

2020 Statewide New Measure Development & Measure Update Process

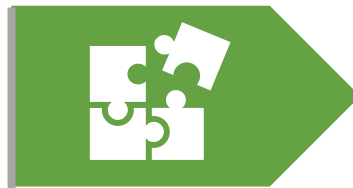


TIM MELLOCH
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Overview



Cal TF - Utility
Collaboration



Applies to All
IOU, 3P & POU
Measures



Applies to
All New &
Updated
Measures



Effective
January 1, 2020

A Productive Collaboration

3



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Key Features

4

Open to 3Ps

Allows 3Ps to propose & develop new & updated measures

Upfront Measure Screening

By committee of multiple stakeholders

Early Input

CPUC Ex Ante Review Team & Cal TF

Standard Template

Standardization increases efficiency & consistency across all measures
Data dictionary explains each field

Clear Guidelines

Standardization of QA/QC
Ensures high-quality, accurate measure analysis & documentation

Final Review

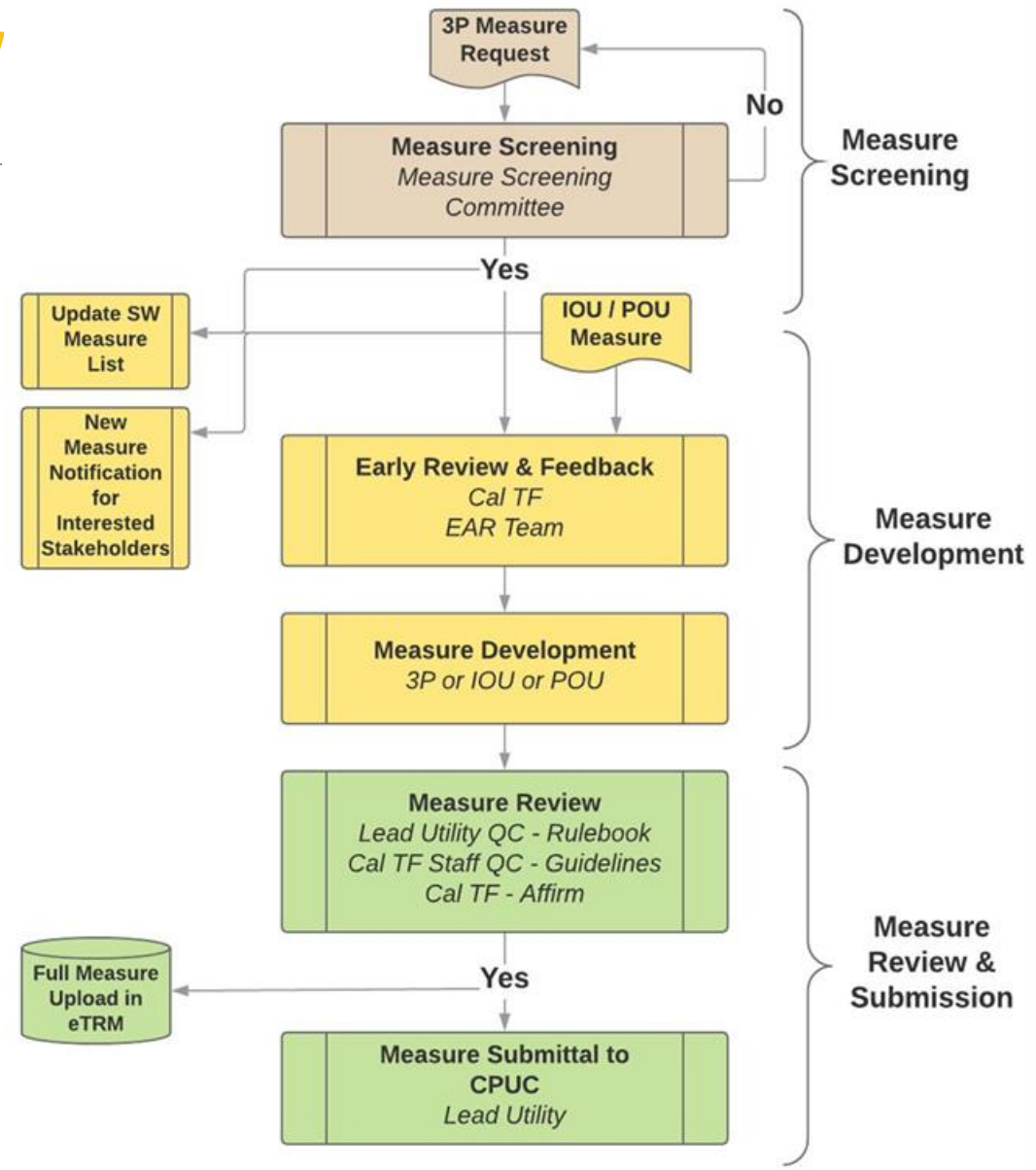
Cal TF Affirmation
Ex Ante Review team review & approval for all IOU measures

Process Overview

5



Process Flow



Measure Screening Committee

7

Voting Members

IOUs PG&E, SCE, SDG&E, SCE
POUs LADWP, SMUD
3Ps CEDMC, NAESCO

Non-Voting Members

CEC
CPUC Staff & EAR Team
+ Independent technical experts as
needed

Voting members cast a single pass/no pass vote

Simple majority advances measure to Measure Development phase

Does not guarantee funding for development

3P can fund development if IOUs don't fund

Outcomes documented & posted to Cal TF website

Measures entered in eTRM

Measure Development Resources & Requirements

8

- Statewide Deemed Measure Template:
 - Statewide Measure Characterization
 - Statewide Data Specification
 - CPUC Four Ex Ante Tables (IOUs to develop)
- Measure Development & QA/QC Guidelines
- Statewide Deemed Rulebook
- Statewide Measure Style Guide

Cal TF Feedback Request

9

- Reaction to New Process
 - Pros?
 - Cons?
- Suggestions for improvement?
- Questions about process?

Reference Slides

10



Measure Screening

11

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
1. 3P Completes & Submits Measure Submission Form	✓	✓	✓		
2. Cal TF Staff Checks Measure Submission Form	✓	✓	✓		
3. Cal TF Staff hosts Monthly Measure Screening Meeting & Measure Screening Committee Makes Pass/No Pass Determination	✓	✓	✓		
4. Cal TF Staff Documents Result of Measure Screening Committee and Communicates to Requester	✓	✓	✓		
5. Cal TF Staff Collaborates with IOUs & POUs to determine Lead Utility	✓	✓	✓		
6. Cal TF Staff Updates Statewide Deemed Measure List (post to Cal TF website)	✓	✓	✓	✓	✓

Measure Development

12

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
7. Measure Developer Completes Measure Development/Update Plan and Submits to Lead IOU/POU	✓	✓	✓	✓	✓
8. Cal TF Provides Early Feedback	✓	✓	✓	✓	✓
9. EAR Team Provides Early Feedback	✓	✓		✓	
10. IOU, 3P, or POU Develops Measure as per Applicable Established Guidelines	✓	✓	✓	✓	✓

Measure Review & Submission

13

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
11. Lead Utility Reviews for Conformance to Deemed Rulebook, EAR Consultant Early Feedback, As Applicable	✓	✓		✓	
12. Cal TF Staff Reviews for Accuracy, Completeness, and Conformance to Style Guide, QA/QC Guidelines, and Cal TF Early Feedback	✓	✓	✓	✓	✓
13. Cal TF Reviews and Affirms	✓	✓	✓	✓	✓
14. Lead Utility (IOU) Prepares Four Ex Ante Tables and Measure Submission Package	✓	✓		✓	
15. Cal TF Staff Conducts Final Review of Measure Submission Package	✓	✓		✓	
16. Lead Utility (IOU) Submits to CPUC for Approval	✓	✓		✓	