

# Data Integration and Analysis



**CALIFORNIA**  
TECHNICAL FORUM

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**PRESENTATION AT CAL TF**  
**SEPTEMBER 2023 MEETING**

**SEPTEMBER 28, 2023**

# Business Case

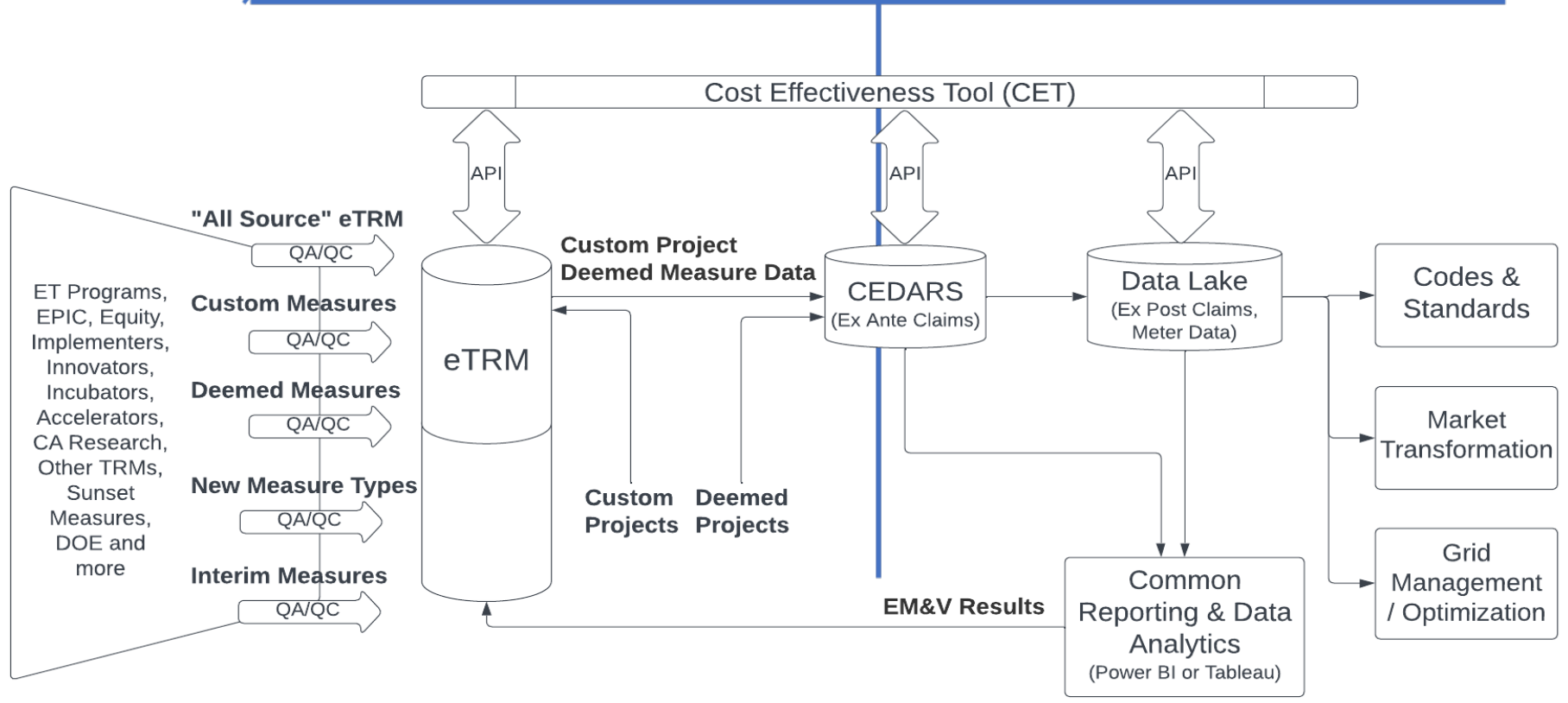
Reduce costs, time and errors associated with EE/DR data administration

Enable data analytics using commercially-available tools and through combining EE/DR data with other federal, state and possibly private data sources

- Background
- Key Emerging Issues Identified to Date
- *Large Group Discussion*

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# Bottlenecks

- Measure Development/Intake
  - Streamline new measure creation
  - Allow new measure types, including equity
- Data Flow
  - Custom – multiple opportunities
  - Deemed –Seamless data transfer
  - Claims - make reported data accessible
  - EM&V - Feed data back to measure development
  - Simplify access to cost effectiveness
- Data Visibility
  - Join multiple data sets
  - Missing data

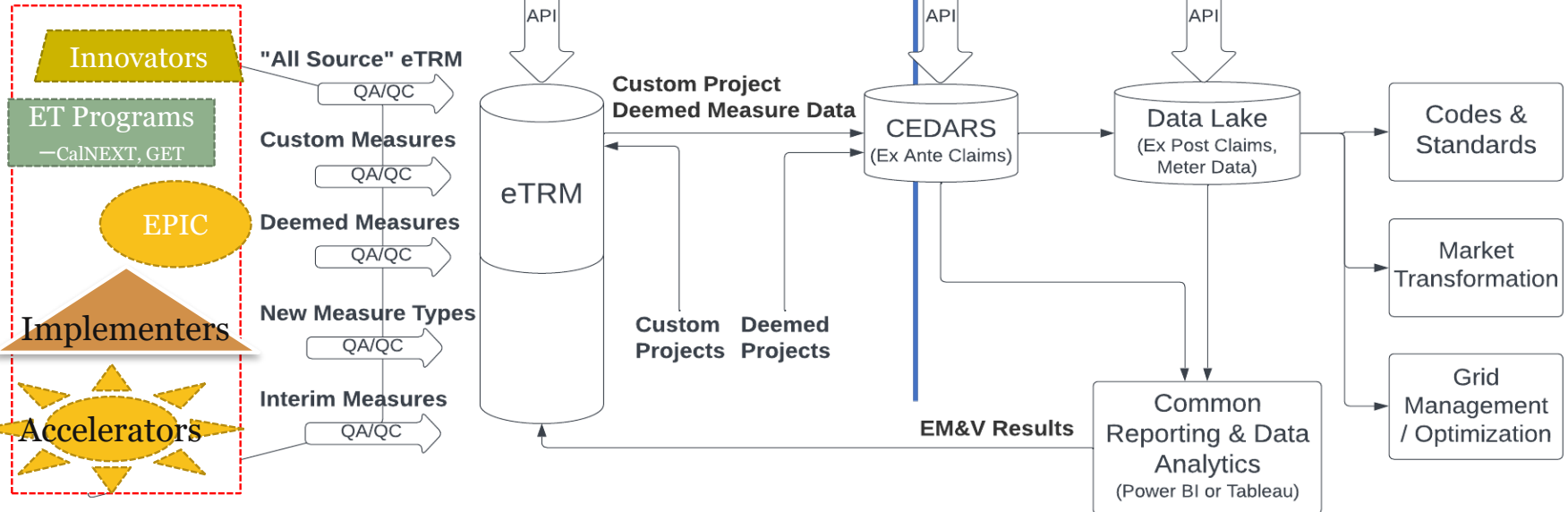
# Streamline New Measure Creation

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Cost Effectiveness Tool (CET)

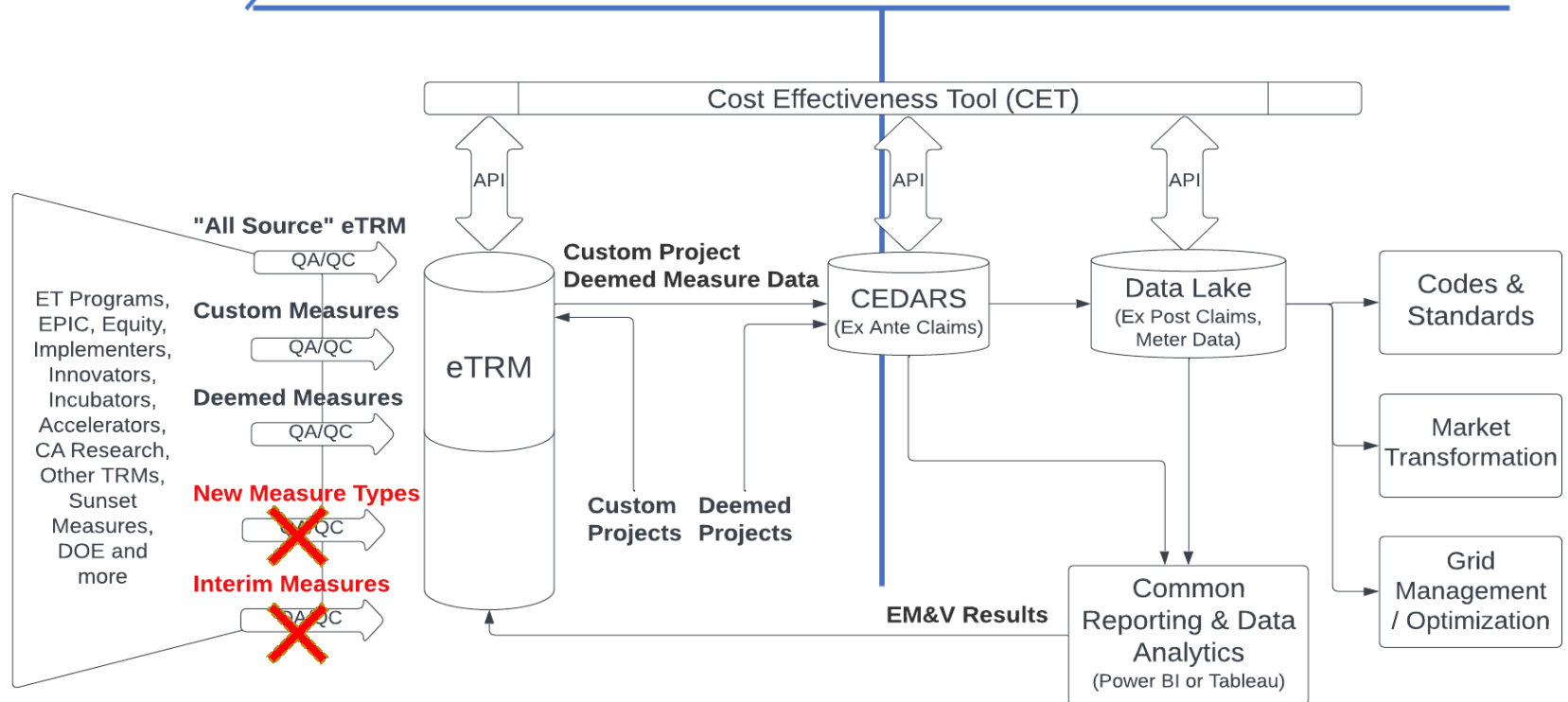


# Add New Measure Types, Including Equity

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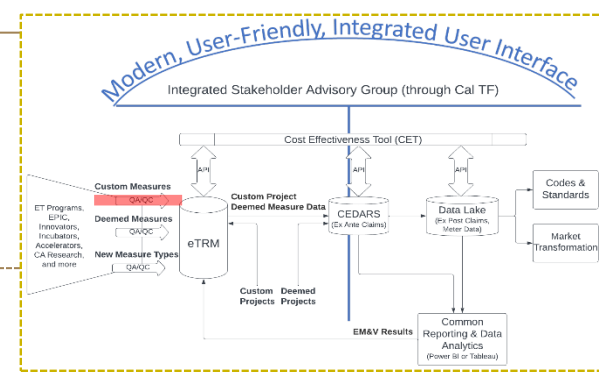
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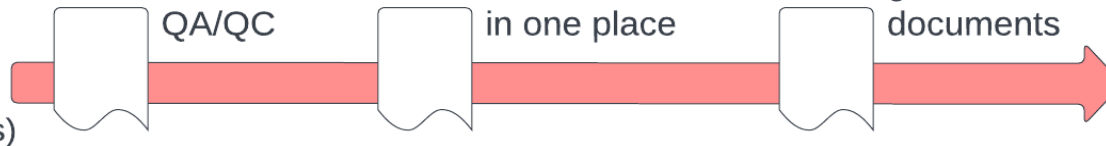
# Cal TF Custom Initiative

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**Custom Project\***  
uploaded in  
consistent format  
(PII accommodations)



Automated  
data  
validation  
to facilitate  
QA/QC

Track project  
timeline  
Document all  
communications  
in one place

Review  
comments  
leveraged for  
guidance  
documents

- Provides a Dashboard for status, history, workload management.
- Track how claims change.
- Supports data analytics.



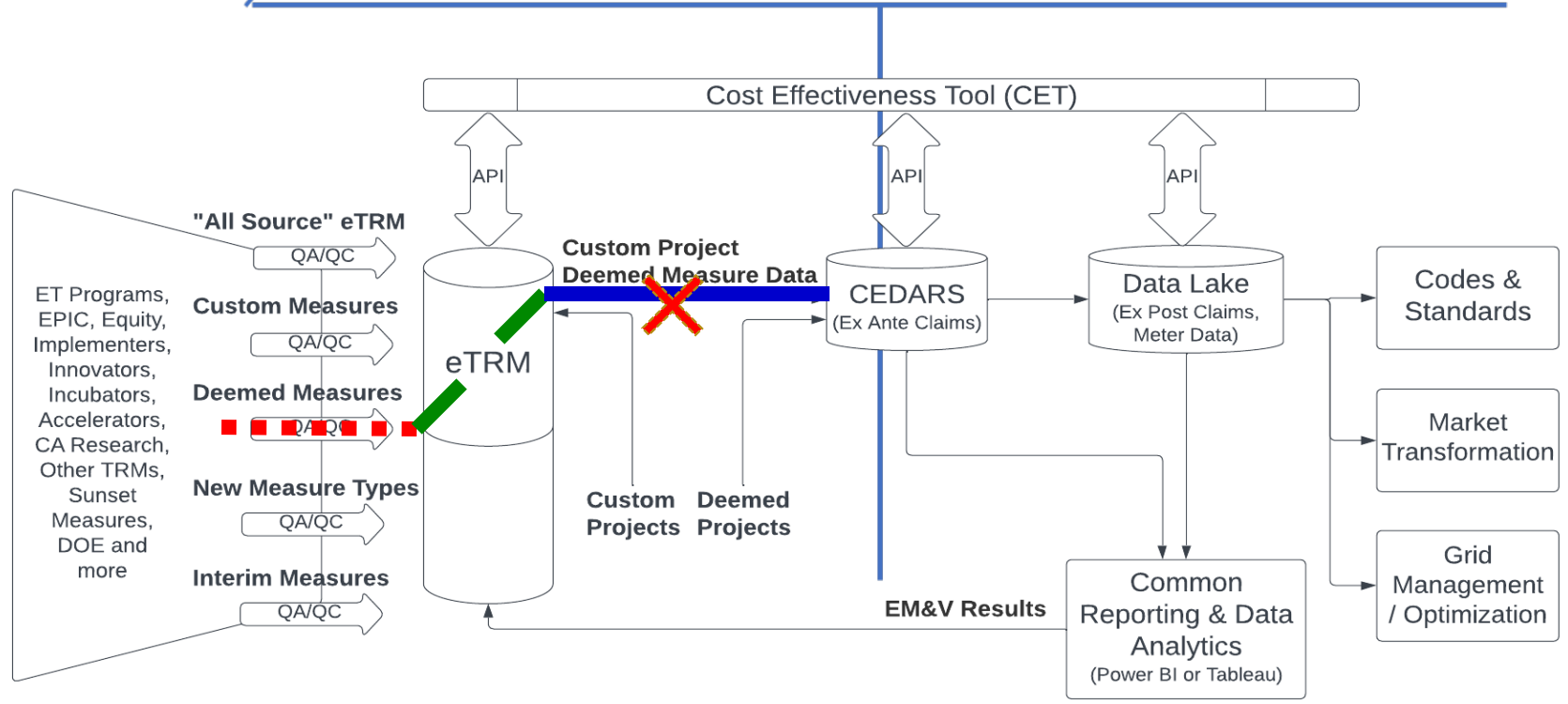
Cal TF Custom Initiative is working on:

- Standardizing custom data nomenclatures
- Standardizing methods, data requirements and tools for custom measures
- Clarifying and making accessible key policy information and data sources

# Deemed – Seamless Data Flow

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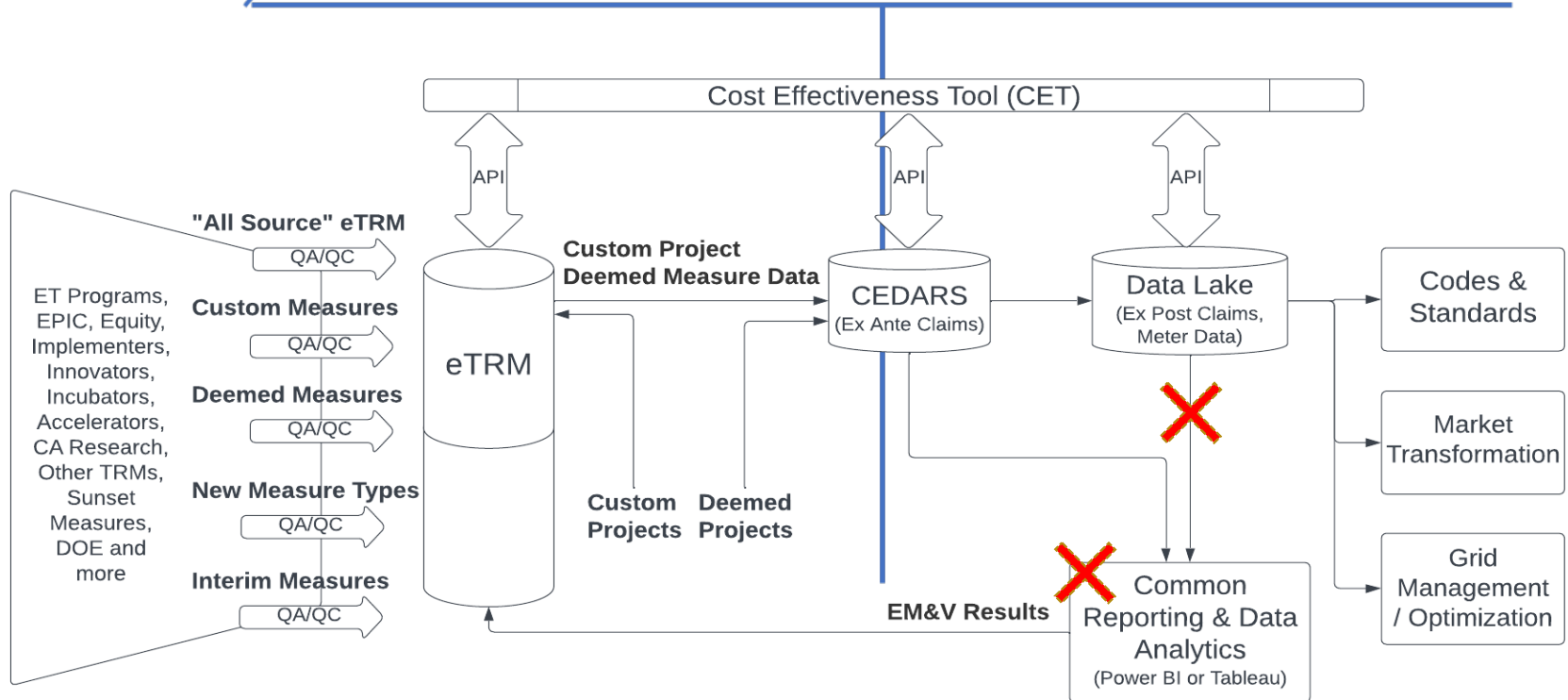


# Claims - Make Reported Data Accessible

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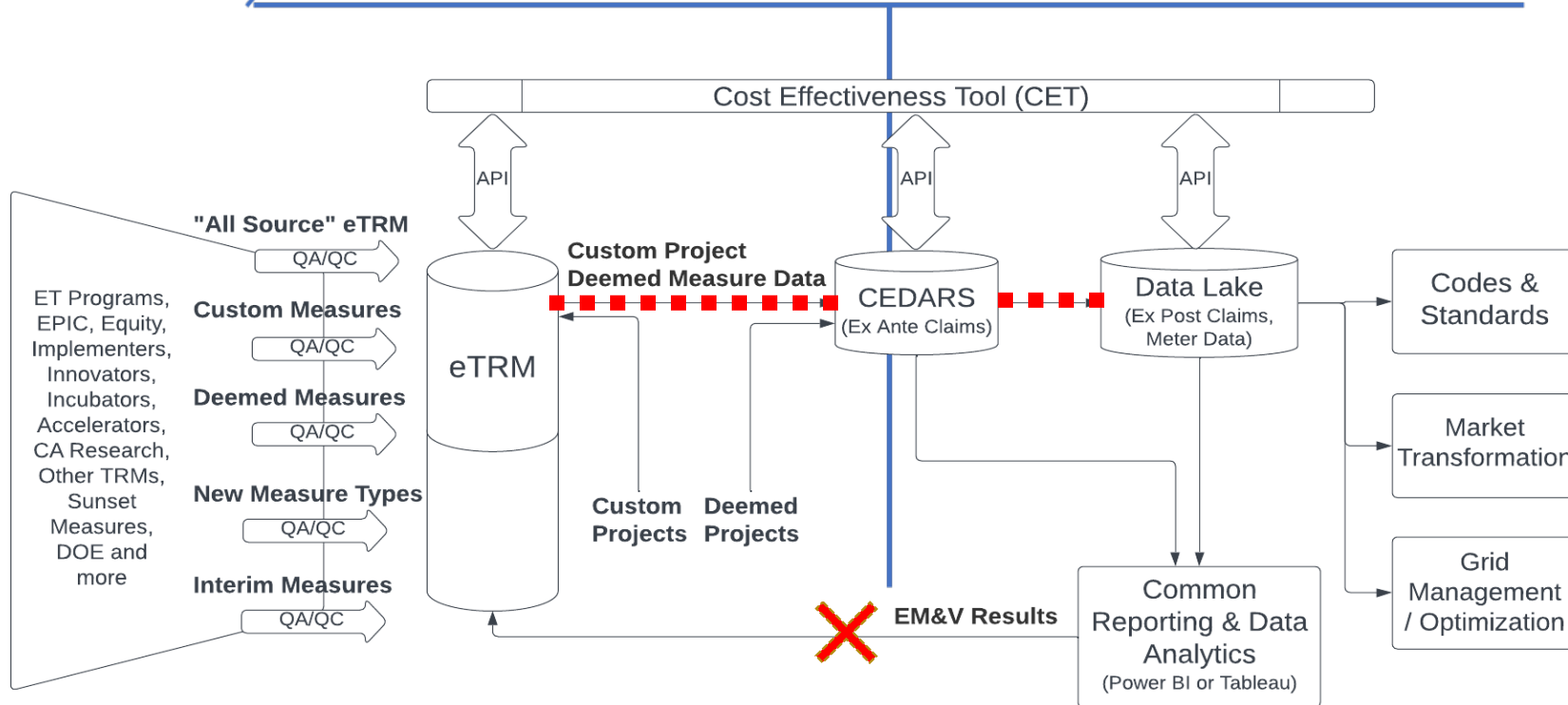


# EM&V - Feed Data Back to Measure

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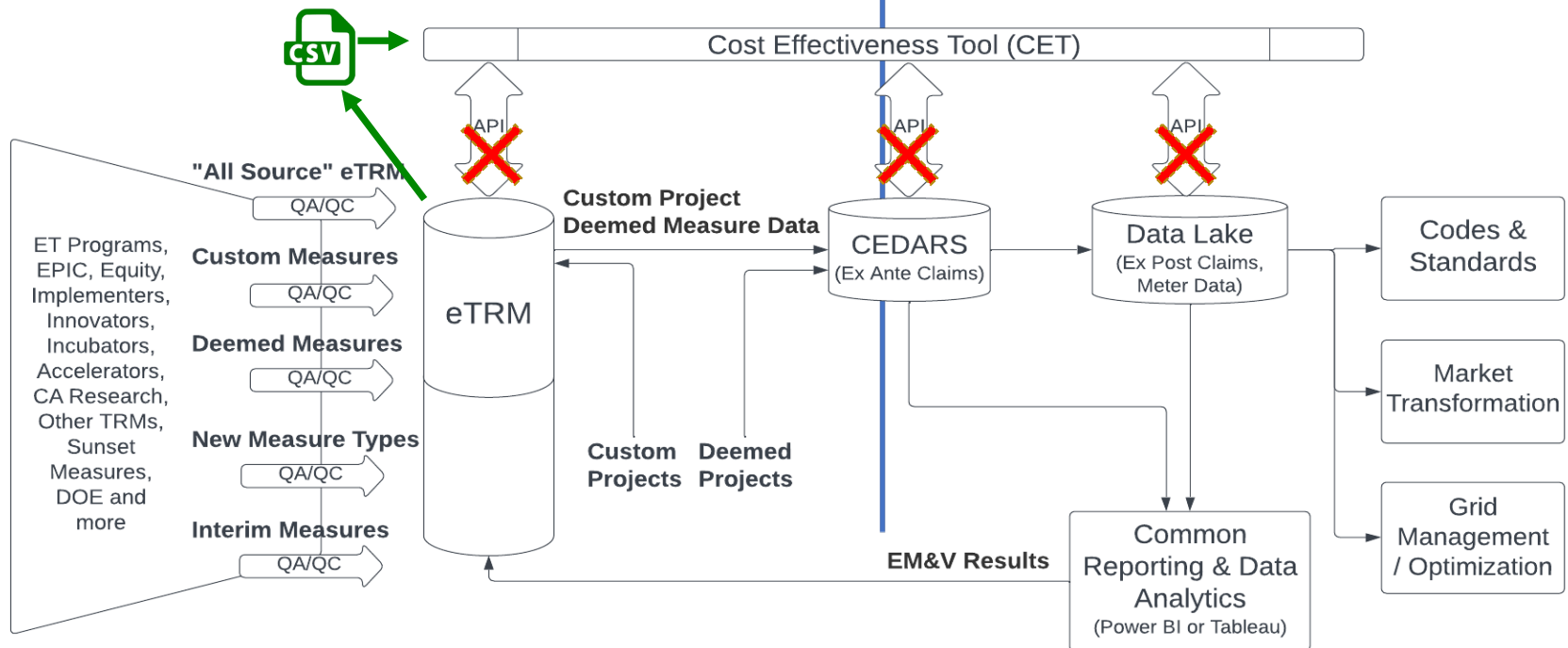


# Simplify Access to Cost Effectiveness

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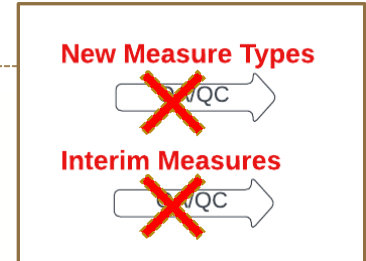
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# DAC Measure Permutations – New Measure Type

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- Create measures for DAC/EJ/low income applications
- **Savings/Cost:** Use existing “market rate” measures, modify relevant parameters to create “DAC” permutations
- **Delivery:** Use “DAC” measures whenever measure is implemented in DAC/EJ/low income community
  - Regardless of whether program is considered “low income”
- Funding should be able to come from EE
  - With consideration of low income program funding as well

# Data Analytics

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- **Enable Data Analytics:** Allow appropriate data access (preserving PII) throughout measure journey for data analysis using commercially-available tools
  - ❑ PowerBI
  - ❑ Tableau
- **Create and Analyze More Robust Data Sets**
  - ❑ Identify federal, state and commercially available data basis that could be combined with EE/DR data to answer important questions in portfolio and program planning, design, implementation and analysis.

# FINAL THOUGHT

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- What power would be unlocked to cost-effectively capture savings, including GHG reductions, if market actors had *access to meter-level data*?



# Large Group: Questions

- How can proposal be improved in terms of:
  1. Claims loaded directly to eTRM from field
  2. PA ability to track projects in the eTRM
  3. PA ability to review projects in the eTRM
  4. Interim measure / New measure type value
  5. EM&V positive feedback loop
- What is most important to address first?

# Back-up – Slides Supporting Questions

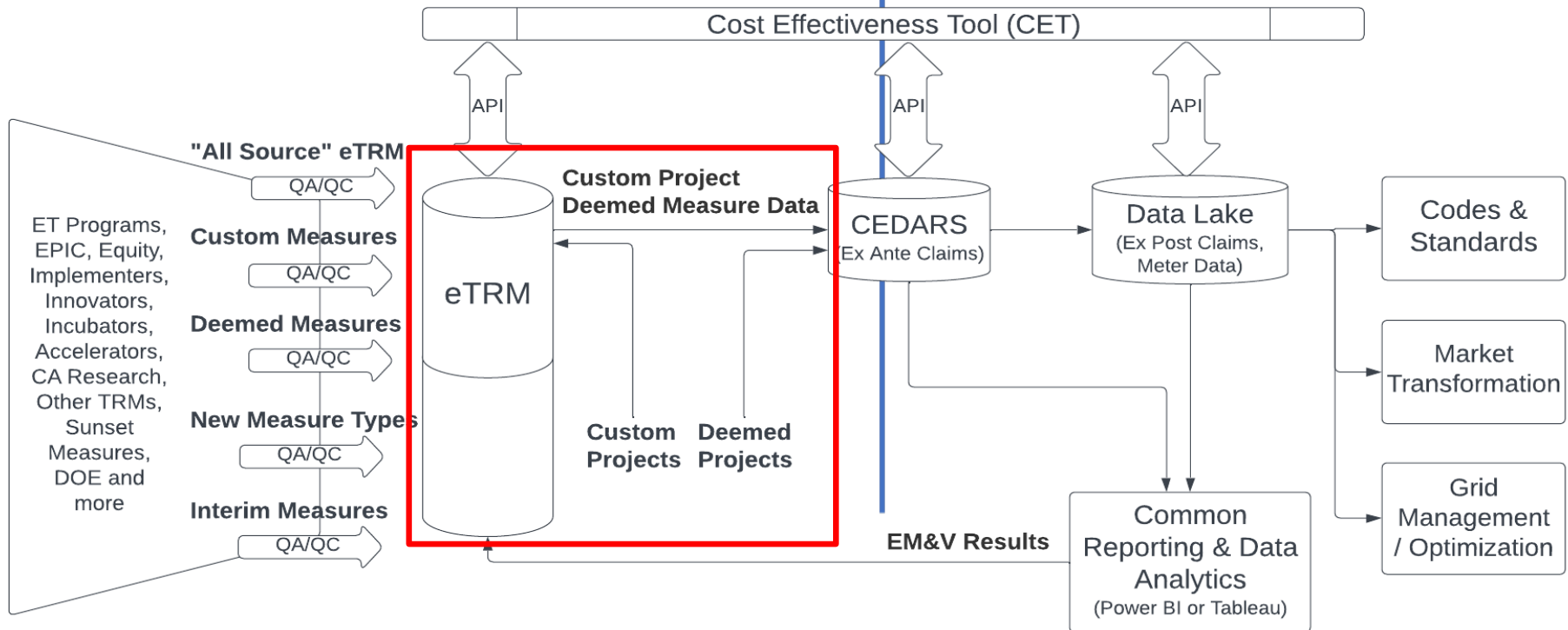
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# Claims loaded directly to eTRM from field

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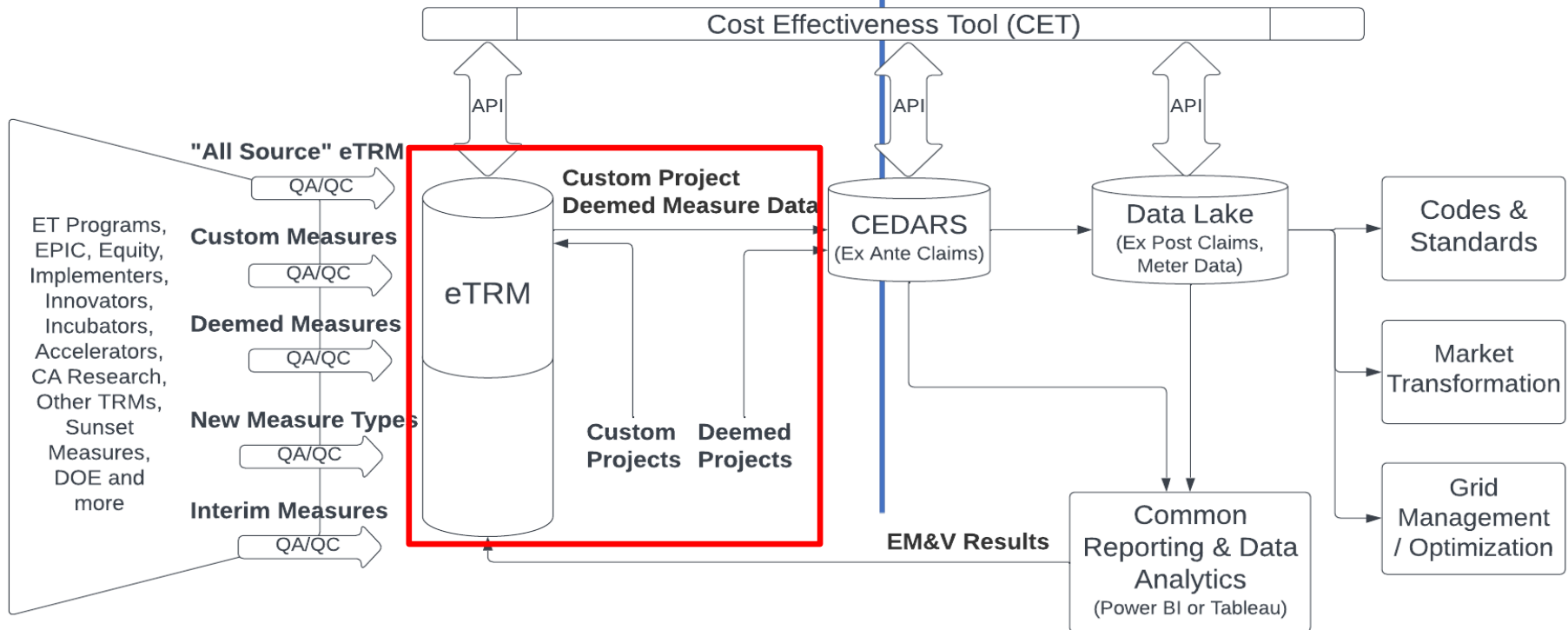
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# PA ability to track/review projects in the eTRM

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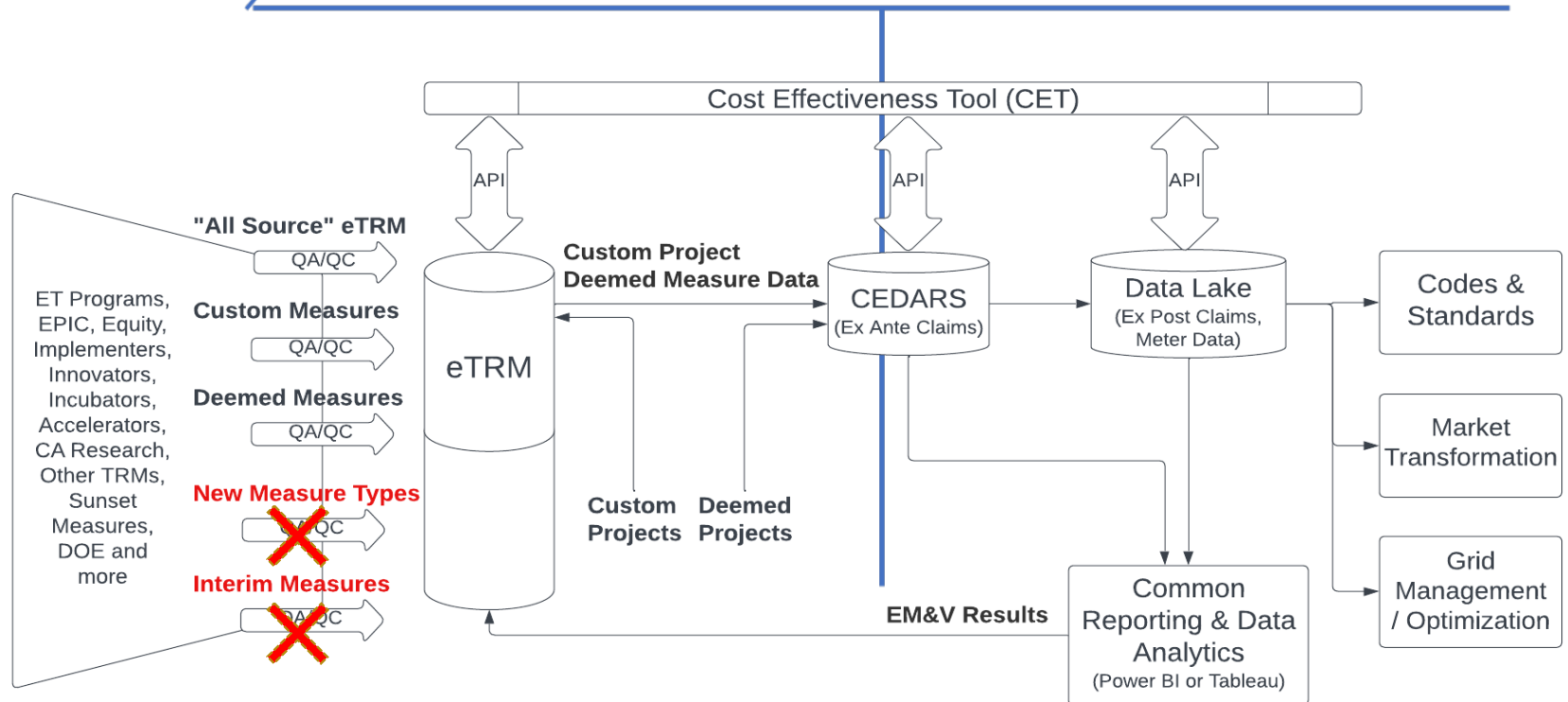


# Add New Measure Types, Including Equity

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# EM&V - Feed Data Back to Measure

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