Cal TF 2020 Business Plan Status Update

CALIFORNIA
TECHNICAL FORUM

ANNETTE BEITEL
AYAD AL-SHAIKH
CAL TF STAFF
SEPTEMBER 24, 2020

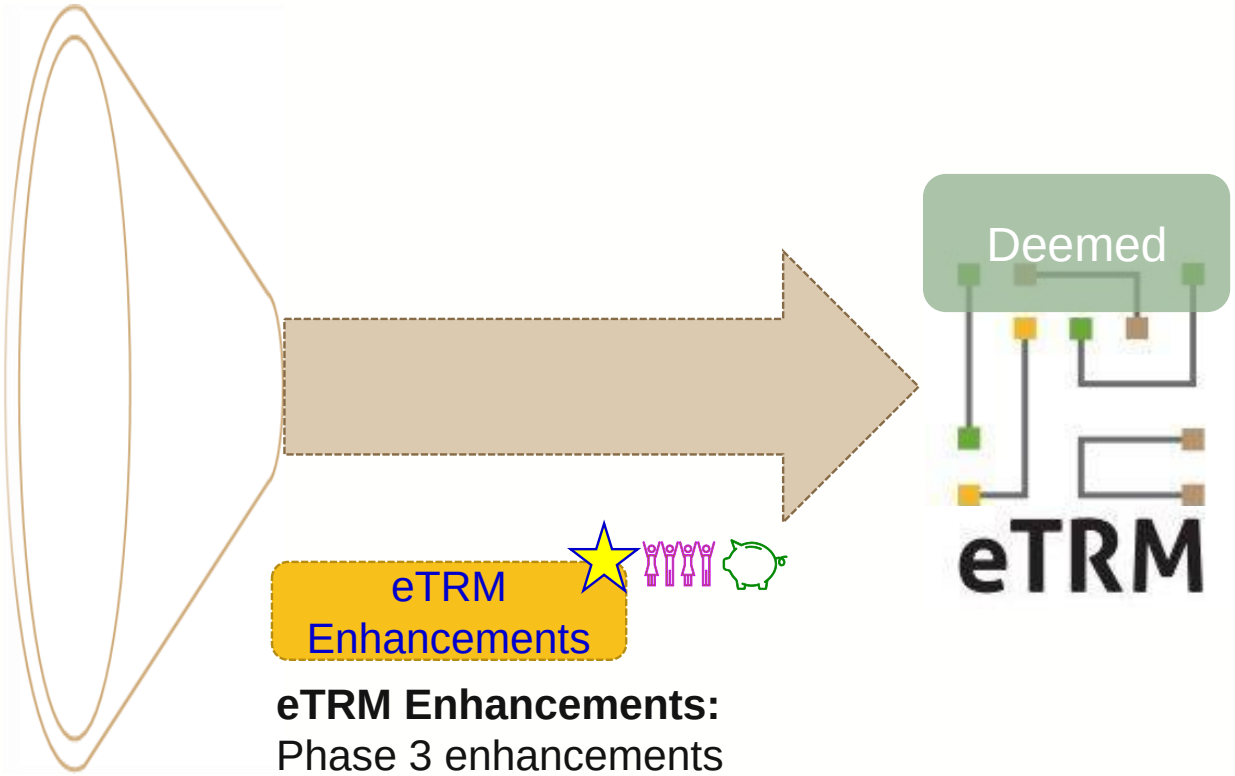
Cal TF 2020 Business Plan Status Update

- Agenda
  - General eTRM Update
  - Review the status of various business plan goals for 2020
  - Show how these elements work together to enhance the deemed measure ecosystem

- Key:
  - Goal Complete
  - Goal In Progress
  - Cost Savings
  - Collaboration
  - More Measures

Measure Ecosystem
Goal 1 – Administer the eTRM

eTRM Administration



eTRM Enhancements

eTRM Enhancements:
Phase 3 enhancements socialized; mandated by E-5082 (plus more).

Trainings

eTRM Trainings:
- IOUs and POUs
- WP developers
- CPUC Staff
- CPUC consultants (Group A and Group D)
- CEC (Demand Analysis -> Energy Assessments Division; Energy Research and Development Division)
- Innovators (LACI, individuals submitting to Measure Process)
- Universities (UCD)

Support Users

Measure Ecosystem
Goal 2 – eTRM Transition & Launch Plan

Purpose: Phase out DEER Ecosystem

Conditional Data Source of Record 1/2/21

CPUC-Phase 1

Deemed

eTRM

Conditional Data Source of Record

Phase 1 Requirements:
Execute plan to meet conditional data source of record requirements.

eTRM Transition and Launch Plan

- IOUs - 4
- POUs – 2
- POUs – (Rest)
- CPUC Staff
- CPUC Consultants
- CEC Staff
- 3Ps

eTRM Governance Plan

- CPUC (& CEC?)
- POUs – LADWP and SMUD

Measure Ecosystem
Goal 3 – New Measure Process

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TPP-11: New Measure Process

Manage & Implement Process

Website Launch: May 2020
- Data request tool

Process Launch: June 2020
- Screening Committee Training
- First measure!

Develop Metrics

Deemed

eTRM
Best-in-Class

Outcomes
- Inclusive committee measure review
- Transparent process
- Feedback *and help* to measure proposers
- New measure forms aligned with Measure Template (so developers will know what is needed for regulatory review/approval and portfolio introduction)

Expanded Measures
- New Measure types
  - EE/DR
  - Bundle packages
  - IoT
  - Targeted measures
  - …

New Measure Process

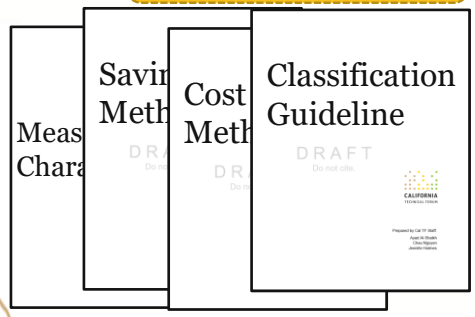
Cal TF Website
www.caltf.org

- eTRM (*www.caetrm.com*)
  - User Guide
- Submit a Measure
  - Proposal Form
- Tools
  - Measure Template
  - Data Dictionary
  - Style Guide
- The TF (Subcommittees)
  - Savings Methodology
  - Cost Methodology
  - Measure Classification

Measure Ecosystem
Goal 4 – White Papers - Guidelines

Purpose: Clarity, Consistency and Transparent Approaches

White Papers



Deemed

eTRM

Best-in-Class

Modeled Measure Guidelines
- Subcommittee developed
- ***Cal TF Affirmed!***

Measure Savings Guidelines

Measure Cost Guidelines
- Subcommittee developed
- Affirmation planned for Sept mtg

Measure Classification Guidelines
- In subcommittee development

Guidelines:
- Transparency
- Get it right the first time!
- Lower costs
- Consistency across measures and measure categories

Measure Ecosystem
Goal 4 – White Papers – New Measure Types

Purpose: New Measures for Portfolio

New Measure Type Memos

Outcomes:
- More measures!
- More savings!

Best-in-Class

New Measure Types:

- Procedural measures
- Targeted measures
- Bundled EE measures
- Measures with savings predominantly from software
- BRO & service measures
- EUL extender measures
- Industrial measures
- Fuel Substitution measures
- Generation + EE
- Demand Response + EE
- Storage + EE

Measure Ecosystem
Goal 4 – Technical Position Paper (TPP)

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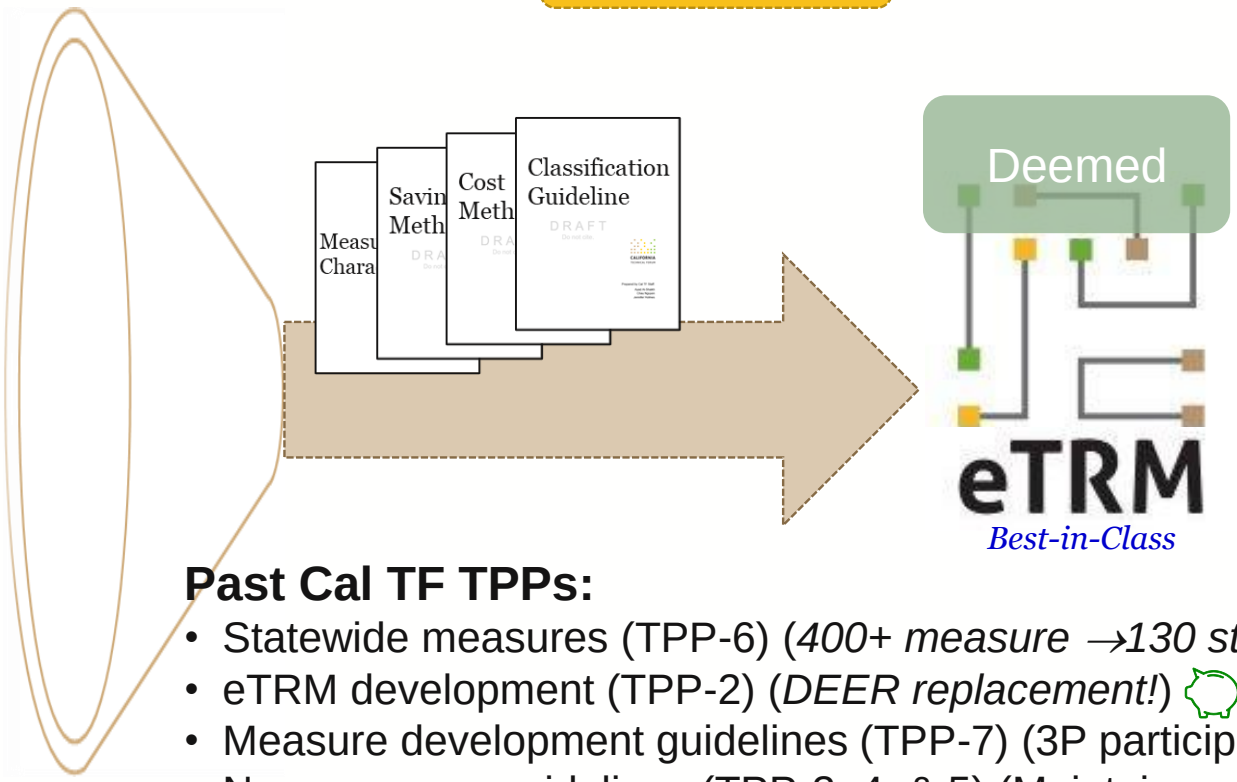
Purpose: More C/E Measures for Portfolio!

C/E Scope



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Outcomes:

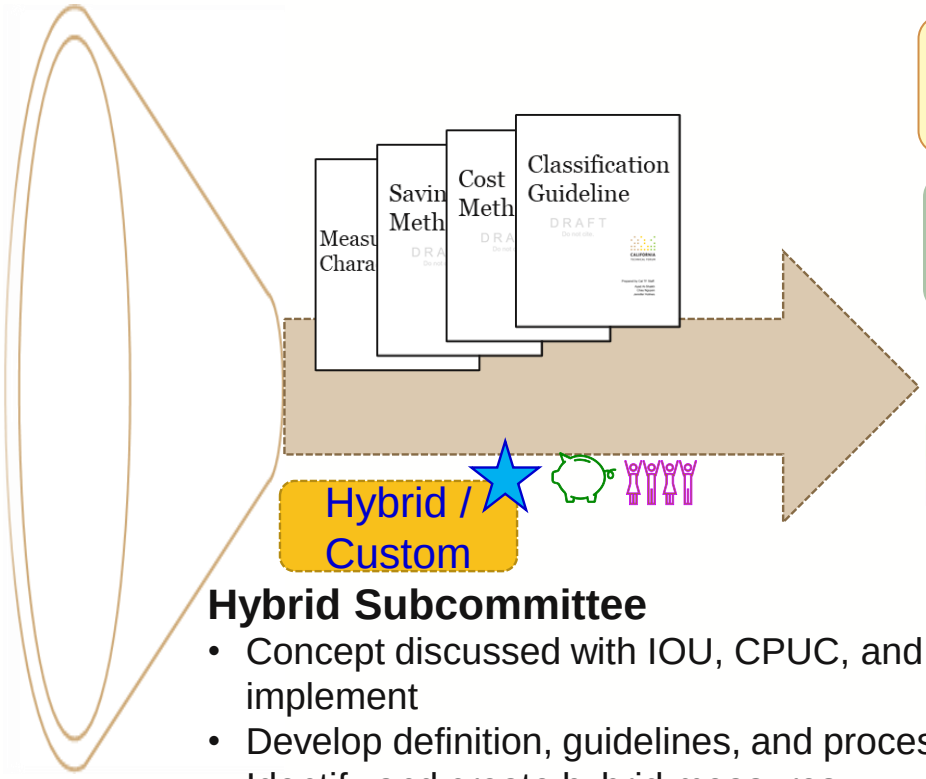
- Foundational documents
- Not just technical or policy
- Provides a plan for execution
  - Framework
  - Process
  - Collaborative approach for generating consensus

Past Cal TF TPPs:

- Statewide measures (TPP-6) (*400+ measure →130 statewide*)
- eTRM development (TPP-2) (*DEER replacement!*)
- Measure development guidelines (TPP-7) (3P participation in implementation)
- New measure guidelines (TPP-3, 4, & 5) (Maintain workpaper standards)
- New measure process (TPP-8 & 11) (More measures)

Measure Ecosystem
Goal 6 – Hybrid Measure Guidelines

Develop Guidelines and Process for Hybrid Measures



Custom

Hybrid

Deemed

eTRM

Best-in-Class

Hybrid Subcommittee

- Concept discussed with IOU, CPUC, and implement
- Develop definition, guidelines, and process
- Identify and create hybrid measures

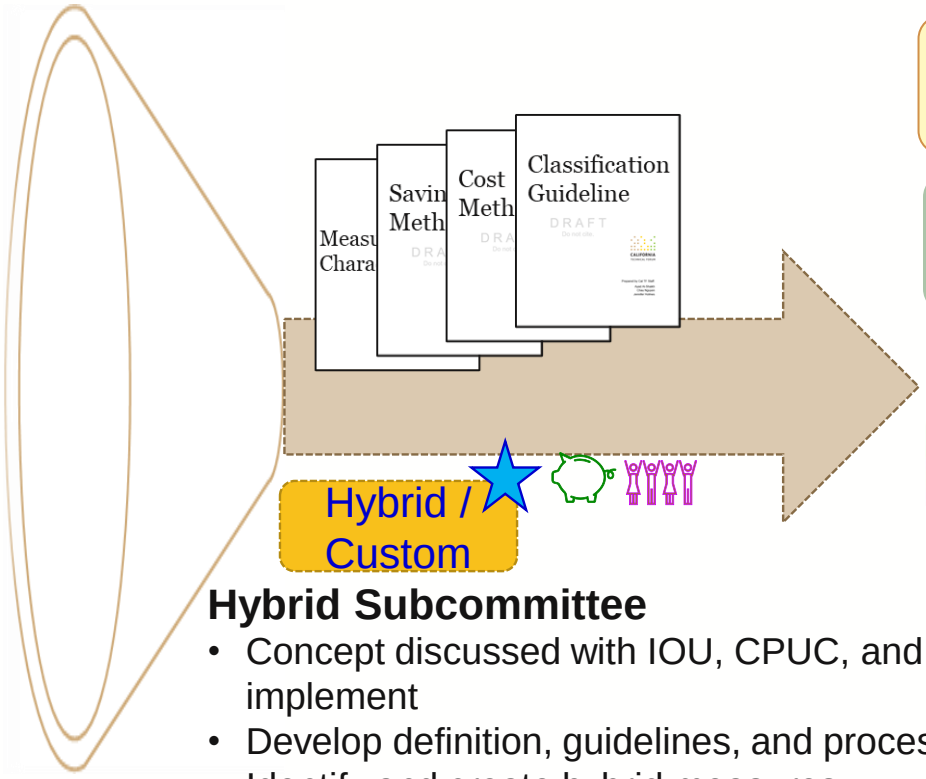
POU Custom Project Development and Review White Paper

Outcomes:

- Streamlined custom
- Less expensive
- Happier Customers!
- Less frustration for implementers

Measure Ecosystem

Develop Guidelines and Process for Hybrid Measures



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2021 Cal TF BP

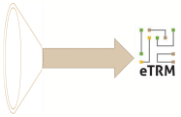
ANNETTE BEITEL
CAL TF STAFF
SEPTEMBER 24, 2020

Business Planning for 2021

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
Develop the 2021 Cal TF Business Plan	Develop Cal TF 2021 Business Plan • Draft by October 15, 2020 • Final by the December 2020 PAC Meeting	Cal TF Staff will solicit comments on the draft Cal TF 2021 Business Plan from TF, PAC, CPUC and CEC staff, and other stakeholders. Cal TF Staff will develop a final 2021 Business Plan that reflects stakeholder input. Cal TF Staff will submit to PAC for review and approval in the December 2020 PAC meeting.	Transparency	PAC, TF, CPUC Staff, and others will provide input on the draft 2021 Cal TF Business Plan. PAC will affirm the 2021 Business Plan by December 2020.

Business Planning for 2021

- Topics to consider
  - Mandatory
    - Cal TF Administration
    - eTRM Enhancements

    - New Measure Review Process 

    - Ongoing Measure Updates

  - Optional
    - White papers, TPPs, Custom, Hybrid
    - Additional Considerations:
      - Are we meeting POU wants/needs
      - Interests of other TF members?

Regulatory Engagement Update: CEC

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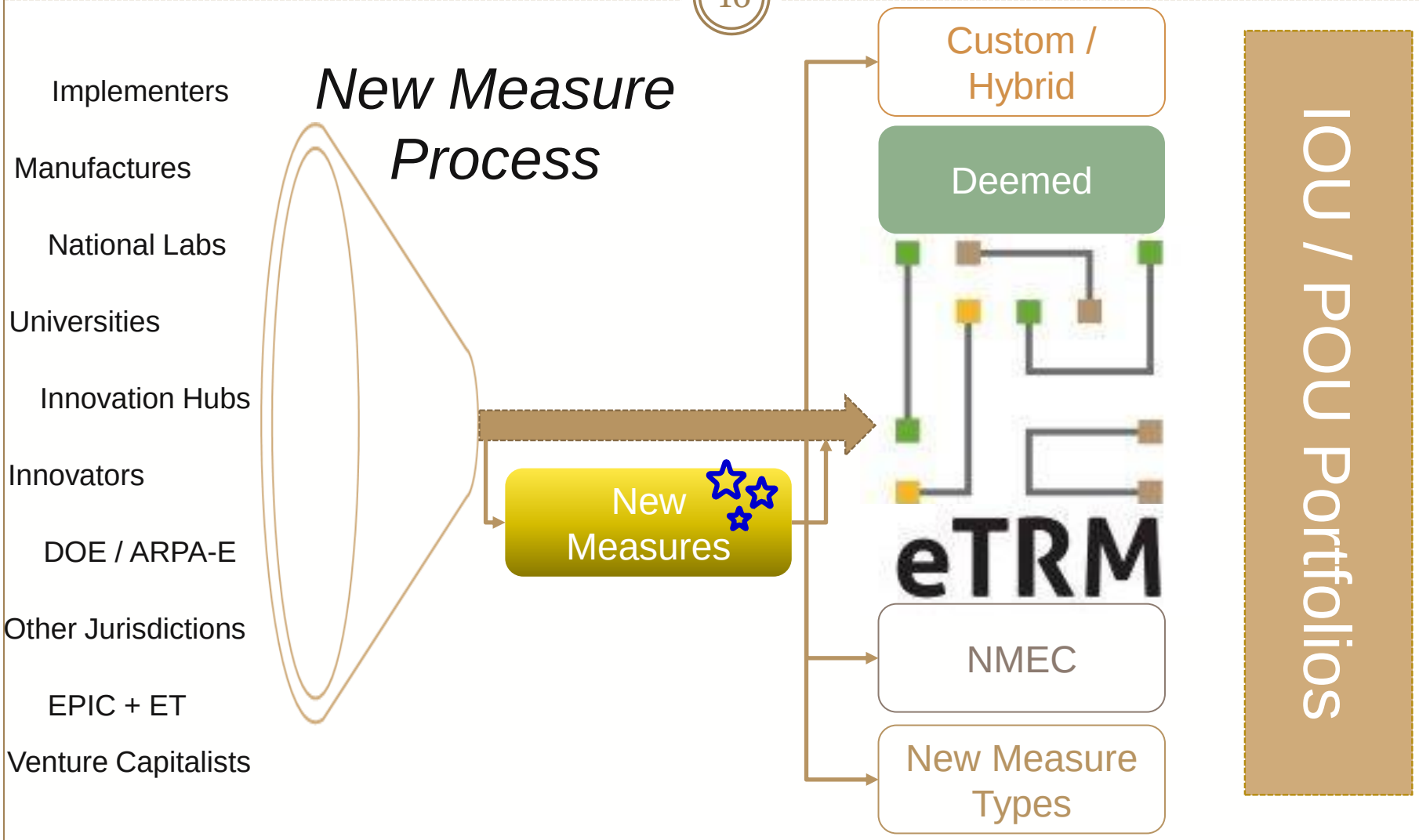
New Measure Process



CEC R&D Team: EPIC Collaboration

Measure Screening Committee:

- Cal TF Staff
- IOU Leads
- POU Leads
- CEDMC
- NAESCO
- SMEs

EPIC
$147M/yr
D.20-08-042
until 2030

EPIC
EE/IDSM

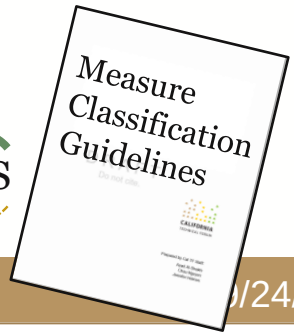
Market Feedback

eTRM, Tools, and Cal TF

IOU / POU Portfolios

New Measures!

R&D / ET | Custom | Hybrid | Deemed | NMEC | C&S



Review of EPIC Annual Reports

- EPIC has broad scope
- Reviewed 5 Annual Reports (2015-2019) and identified 4 potential New Measures

OhmConnect

EE + IDSM
Residential

PowWow

Agricultural

Lightapp

Industrial

Hank

Commercial

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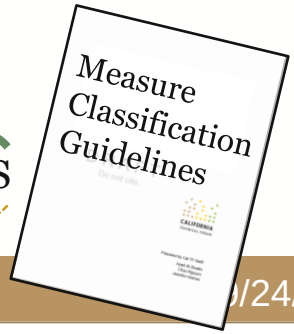

Maximizing Value of Cal TF

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Maximize Value of Cal TF Survey

- Purpose: Help set direction for Cal TF going forward
- Structure:
  - Rate value of past work (numeric and room for comments)
  - Cal TF and PAC Process
    - What is working/what can be improved
    - Solicit input on changes to Cal TF composition
  - Solicit input on future direction
    - Mission
    - Objectives
    - Paste value of future possible work (numeric and room for comments)
  - Will separately report responses from different organizational types (assuming sufficient responses received in individual categories)
    - Cal TF members, implementers, IOUs, POUs, CPUC Staff/consultants, CEC Staff/consultants, Evaluators
  - Follow-up individual interviews, as needed.