CALIFORNIA
TECHNICAL FORUM

DRAFT Business Plan
2020

To support the growth and success of energy efficiency and integrated demand-side management (IDSM) through a technically rigorous, independent, transparent peer review of California energy efficiency values and other related technical information.

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
1. **Administer the eTRM ver. 1.0**	Complete 2020 eTRM **training** objectives, including: • Conduct up to nine (9) two-hour webinar trainings for different user groups. Implement **Phase 3 eTRM Enhancements** • Complete by end of Q4 2020 Administer eTRM • Ongoing Develop **2021 eTRM Enhancements** list by end of Q3 2020	Cal TF Staff will support **industry training** on the eTRM through the following activities: • Coordinate with the IOUs, POUs, CPUC, and CEC to determine their training needs and timing. • Solicit input on eTRM training needs of 3P implementers/other stakeholders through Cal TF and other venues (such as CEDMC). • With input from CPUC Staff, solicit input on eTRM usability and training needs by developing and administering an online questionnaire for trainees and users and preparing summary memorandum (Q3 2020). • Solicit and memorialize feedback from users on experience with eTRM ver. 1.0 and possible enhancements and solicit recommendations additional features and enhancements for 2021 (Ongoing). Cal TF Staff administers Phase 3 Enhancement contract so that development and deliverables are on-time and within budget. Cal TF Staff will administer the eTRM through the following activities: • Respond to questions and issues raised by "Key Organizations" within 1 business day; in-state users within 2 business days. • Maintain "issue" and "suggestion" log to track user issues and questions. • Manage user roles and permissions • Develop guidelines, processes and requirements for various functions, • Monitor system performance and fix identified issues.	Cost Savings Transparency Standardization eTRM User Experience Transparency eTRM User Experience	Key stakeholders (6 funders – PG&E, SCE, SCG, SDG&E, LADWP and SMUD – and the regulatory agencies, CPUC and CEC) will identify key internal users to receive eTRM training and support. CPUC Staff and Ex Ante Review Consultants (EAR Consultants) will provide input on what feedback they would like from eTRM users. Key stakeholders (6 funders – PG&E, SCE, SCG, SDG&E, LADWP and SMUD – and the regulatory agencies (CPUC and CEC) will dedicate staff to test new features after each eTRM development "sprint." The eTRM web developer will complete bug fixes or required updates.

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2.	**Implement the eTRM Launch Plan so the eTRM will be the "Database of Record" Effective January 1, 2021**	Implement the eTRM Launch Plan so that eTRM is used as **"Database of Record"** for statewide deemed measures by CPUC, IOUs, POUs, and 3Ps by **January 1, 2021** [1]	Cal TF Staff will coordinate with multiple organizations to implement the eTRM Launch Plan. **Cal TF Staff will work with the CPUC Staff and Cal TF PAC** to identify and implement the path to eTRM adoption as the "Database of Record" by January 1, 2021. Cal TF Staff will update measures with all eTRM Phase 3 Enhancement features so that measures that are already entered will reflect all Phase 3 Enhancements. Cal TF Staff will update existing published measures with DEER updates so that eTRM reflects DEER updates. Additional technical analysis or modeling will be performed by the PAs and Cal TF Staff will enter results into the eTRM.	Cost Savings eTRM User Experience Transparency Statewide Consistency	The following organizations will meet with Cal TF Staff to identify opportunities for **transitioning to and leveraging the eTRM:** • **CPUC** • **CEC** • **CEDMC and members** • **IOUs** • **POUs** • **RENs**
3.	**Implement and Manage 2020 New and Updated 3P Measure Development and Review** **Provide Consistent Cal TF Review of IOU-Developed and Updated Measures.**	Track and report measure development metrics (Ongoing)	Cal TF Staff will establish a **statewide Measure Review Committee** consisting of several informed parties in addition to the IOUs to assess the viability of 3P proposed measures. Cal TF Staff will create a **central intake process** for 3P proposed measures (new or updated) through Cal TF website. Cal TF Staff will screen Measure Intake form for completeness. Cal TF Staff will organize and administer a SW Measure Review Committee process for considering 3P new measures or revisions to existing measures. Cal TF Staff will **memorialize measure review committee decisions and will enter "passing" measures into eTRM.**	Cost Savings Time Savings Transparency Stakeholder Engagement	The IOUs and POUs will track time and costs associated with new measure development and measure updates utilizing tools available in the eTRM.

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[1] Successful completion of this deliverable is subject to CPUC approval for the eTRM to serve as the Database of Record for statewide deemed measures.

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
		Cal TF Staff will solicit early Cal TF and EAR Consultants feedback on proposed measures or measure updates and will monitor measure development. Cal TF Staff will review final measure or measure update to ensure it conforms to the Measure Development and Peer **Review QA/QC Guidelines**. Cal TF Staff will then work with measure developers to present and seek affirmation from Cal TF. Finally, Cal TF Staff will then coordinate with IOUs, who will submit measures through WPA for CPUC Staff review and approval. Cal TF Staff will work with CPUC Staff, IOUs, and POUs to develop **tracking of time and costs** associated with new measure development and measure updates.		
4. **Develop Statewide Low-Income Deemed Measure Template for Low-Income Measures** **Consolidate three (3) Measures Based on Similar Statewide Measures in the Mainstream EE Portfolio.** [2] **NOTE**: This item could not be funded through EE funding, and would be subject to approval by low income staff (CPUC and IOUs).	Develop Statewide Low-Income Deemed Measure Template Consolidate and prepare three (3) low-income measures	Cal TF Staff will work with IOUs and will solicit input from CPUC Staff to develop a Statewide Low-Income Deemed Measure Template for low-income measures. Cal TF Staff will work with the low-income subcommittee to identify three (3) low-income measures to develop. Cal TF Staff will lead measure harmonization/consolidation process for those three measures. Cal TF will review secondary sources if needed but will not conduct primary (field) research to address data gaps. Cal TF Staff will work with the low-income subcommittee to present the three (3) low-income measures to CPUC EAR Consultants for review/comment.[3]	Technical Rigor Statewide Consistency Transparency	Cal TF members and IOUs will continue to participate in the low-income subcommittee and will engage both low-income and measure development staff to participate in low-income measure harmonization, standardization, and documentation process. CPUC Staff agree to allow EAR Consultants to review and comment on the modified measure template for low-income measures as well as the initial three low-income measures.

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[2] In response to CPUC Decision 17-12-009 that directed the IOUs to coordinate with the Cal TF to recommend prospective savings values and revisions to its EM&V methodologies for low-income programs.

[3] Low-income measures are not reviewed/approved by the CPUC Staff.

	Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
5.	**Manage, Update and Communicate Monthly Changes to the "Statewide Deemed Measure List"** **Facilitate Statewide Coordination and Communication of New Statewide Deemed Measures and Measure Updates.**	Update and post the Statewide Deemed Measure List (Monthly)	Cal TF Staff will work with CPUC Staff and EAR Consultants to update the Statewide Deemed Measure List form with additional fields and information requested by the EAR Consultants. Cal TF Staff will circulate the Statewide Deemed Measure List monthly to IOUs and POUs for new measures and measure updates. Cal TF Staff will conduct monthly teleconferences with designated IOU and POU leads to review new measures and measure updates to ensure all are aware of changes/additions and can ensure measure changes/additions reflect statewide needs. Cal TF Staff will post monthly updated Statewide Deemed Measure List to Cal TF website.	Cost Savings Statewide Consistency Transparency	During monthly meetings, the IOU and POU measure development coordinators will inform their IOU counterparts and Cal TF Staff of measures under consideration, in development, and retired; as well as the status of measures in development. IOU/POU measure development leads will ensure that new measures are developed to be applicable statewide and will reflect include input from their counterparts at other IOUs and POUs.
6.	**Update and Maintain Stage 2 Issues List** [4] **Develop One or More "Technical Position Papers"**	Track, monitor, and report on recommendations pertaining to Cal TF Stage 2 Issues List Draft and final Technical Position Paper	Cal TF Staff will maintain and update the Stage 2 Issue List with input from IOUs, POUs, Staff and EAR Consultants and CEC Staff. Potential Topics: • Reviewing EE Technical Potential Approaches • Harmonizing cost methodologies and measure-level load shapes • PAC Test vs. TRC in screening and valuing measures.	Transparency Statewide Consistency Technical Rigor	The following entities will provide timely input on the Stage 2 Issue List, particularly how to prioritize issues and if they would like to lead development and resolution of one or more Stage 2 issues: • IOUs & POUs • CPUC ED & EAR team • CEC
7.	**CA EnergyPlus Building Prototype Model Analysis and Documentation**	Document differences between the common commercial building prototypes (differences in rulesets)	**Document the differences between and locate documentation for common commercial building prototype sets:** • DOE Energy Plus – NREL • DOE Energy Plus – PNNL (ASHRAE 90.1) • DOE Energy Plus – PNNL (IECC) • CPUC DOE2/2r Commercial	Cost savings Standardization Transparency	UC Davis will provide technical and modeling support (EnergyPlus) for prototype analysis and documentation under a subcontract to Cal TF. CEC Staff and CPUC Group A and Group D consultants will provide input throughout.

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[4] Stage 2 issues are issues related to deemed measures that should be addressed/resolved later (after CPUC review/approval process for a new/updated measure). It is common for issues to be identified (policy or technical) that cannot be addressed/resolved at the time a measure is submitted for review due to insufficient data, need for a policy clarification/change, or other reasons.

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
	Create and populate a single statewide repository of well-documented common EnergyPlus CA commercial prototypes developed that can be used for modeling deemed and custom measures and in the new construction programs Investigate the creation of a set of well-documented EnergyPlus CA residential prototypes that could be used as a basis for deemed, custom, and code-compliance	• CEC Energy Plus (CBECC-Com) Provide guidance on the structured approach for documenting building prototypes. Recommend a set of inputs and associated documentation to harmonize across these five (5) commercial prototype sets. Investigate and document the differences between the residential building prototypes from these standards: • CEC CSE (CBECC-Res) • CPUC DOE2 Residential Provide recommendations on the number of building type and vintage prototypes that should be maintained. Clearly define what is and not included in the ruleset documentation for residential and commercial building prototypes and identify rules that need to change between different use-cases.	Standardization Transparency Cost Savings Standardization Transparency Standardization Transparency	SCE, the statewide lead for modeling, will collaborate with Cal TF Staff.
8. **Document Deemed Modeled Measures in a Consistent / Transparent Way**	For all modeled measures (primarily DEER measures), identify missing documentation for the eTRM (requires assistance from EAR Consultants) Create documentation standard to follow for a modeled measure to ensure all modeled measures for deemed are well-documented and reproducible	Create consensus on the methodology for documenting modeled measures that could include: • Prototype source • Input files (weather files, thermostat settings, weighting files, etc.) • Keyword changes with justification and documentation. • Identify areas where documentation is not available so it can be updated over time. Create a standard way to document results of a modeled measure.	Cost Savings Transparency Standardization Transparency Standardization	EAR Consultants will identify missing documentation for DEER modeled measures. CPUC Consultants (Group A and D) and CEC Staff will develop common documentation standard for modeled measures. SCE, the statewide lead for modeling, will collaborate with Cal TF Staff.
9. **Support Custom Process Project Improvement Process**	Develop custom project workflow technical and business specification for the eTRM	Create a technical and business specification to develop the custom measure workflow within the eTRM that will make custom project	Cost Savings Customer Experience Transparency Standardization	SCE will work with Cal TF Staff to ensure that all custom project forms have been created for statewide use: • Project feasibility form (complete)

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
	Develop statewide numbering and naming system through consensus process

Develop customer project POE guidelines through consensus process for consideration by CPUC Staff | development and review (time and process) transparent, trackable, and reportable.
Work with SCE to implement a custom project package solution that organizes and maintains documents throughout the life of the custom project. This will minimize additional work needed to generate packages for EAR Consultants.

Gain consensus and formalize the recommended statewide number and naming system in a memo. Note that IOUs will likely maintain a crosswalk internally to accommodate within their systems.

Gain consensus through Cal TF and formalize the recommendations for POE associated with custom projects through a memo.

Gain consensus on reducing the subjectivity of the CPUC questionnaire that offers early guidance on whether a project can be accepted in the custom program. | Customer Experience Standardization Time Savings Cost Savings Increased Savings

Standardization

Cost Savings Transparency Standardization

Cost Savings Customer Experience Transparency | • Pre-inspection form
• Installation report form
• Post-inspection form

IOUs will provide their respective custom measure numbering processes.

SCE, the statewide lead for custom process improvement, will collaborate with Cal TF Staff. |
| 10. **Develop Guidelines and Process for Hybrid Measures** | Develop guidelines for "hybrid measures" created through consensus process

Identify and create 2 – 3 hybrid measures (Q4 2020) | Define and create criteria for a hybrid measure.

Develop Hybrid Measure Characterization Template and Data Specification based on the Statewide Deemed Measure Data Specification.

Review IOU custom measure project lists from the previous 5 years to create list of all potential hybrid measures and support the choice for the first 2 – 3 hybrid measures.

Ensure that the first hybrid measures include both gas and electric savings measures. | Cost Savings Time Savings Customer Experience Increased Savings

Standardization Cost Savings Transparency

Cost Savings | The IOUs will provide custom data to support this goal.

The IOUs and CPUC Group D consultants will provide input and review.

CPUC Staff and Group A consultants will provide input to ensure alignment.

Cal TF members will help to gather the implementer perspective for this process. |

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
		Create guidance for the hybrid measure savings calculation methodology for the 2 – 3 example measures that includes: • Allowable assumptions • Inputs from specifications • Inputs from spot measurements • Inputs from logged/monitored data	Customer Satisfaction Standardization Cost Savings Transparency	
		Create guidance for M&V that varies based upon savings or risk or other defendable criteria for the 2 – 3 example measures.	Standardization Cost Savings	
		Create guidance for the calculation methodology specifically for the 2 – 3 example measures that includes: • Cost documentation • References • Project life • Influence	Cost Savings Customer Satisfaction Standardization	
11. Manage the Cal TF and Cal TF PAC	Conduct at least six (6) TF meetings and additional subcommittee meetings held, as required. Conduct four (4) PAC meetings or teleconferences Maintain Cal TF website and update and post all materials	To manage the TF, Cal TF Staff will: • Prepare a calendar of TF meetings and locations • Secure meeting locations and arrange other logistics • Prepare and post meeting agendas and materials • Manage TF meetings • Prepare and post meeting notes To manage the Cal TF PAC, Cal TF Staff will: • Schedule PAC meetings approximately quarterly, based on policy needs and activity • Prepare meeting agendas and materials • Manages meetings • Prepare and circulate meeting notes Cal TF Staff will maintain current data and information (including Cal TF process documents) on the Cal TF website.	Transparency Statewide Consistency Stakeholder Engagement	Cal TF and PAC members will attend meetings. Cal TF members will participate in subcommittee meetings relevant to their expertise. Cal TF and PAC members will prepare for meetings by reviewing materials in advance.

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
12. **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 Cal TF 2021 Business Plan from TF, PAC, CPUC and CEC staff, and other stakeholders. Cal TF Staff will update the draft plan to reflect the stakeholder input. Cal TF Staff will develop a final Business Plan that reflects stakeholder input. Cal TF will submit to PAC review and approval in the December 2020 PAC meeting.	Transparency	PAC, TF, CPUC Staff, and others will provide input on 2021 Cal TF Business Plan. PAC will affirm the Business Plan by December 2020.