



Agenda

California Technical Forum (Cal TF) Meeting

August 25, 2022

Location: Teleconference Only

9:00 a.m. – 10:30 a.m.

1:00 p.m. – 2:30 p.m.

Please join my meeting from your computer, tablet or smartphone.

<https://meet.goto.com/169985277>

You can also dial in using your phone.

United States: +1 (312) 757-3121

Access Code: [169-985-277](https://meet.goto.com/169985277)

Time	Agenda Item	Discussion Leader(s)
9:00 – 9:10	Opening	Annette Beitel
9:10 – 9:30	Cal TF Visioning for Integrated Data Flow ACT: <ul style="list-style-type: none"> • Feedback and Comments 	Annette Beitel
9:30 – 10:30	Custom Activities <ul style="list-style-type: none"> • Custom Tools • SW Custom Methods/Tools/Requirements • Disposition Database Next Steps <ul style="list-style-type: none"> • Custom Subcommittee ACT: <ul style="list-style-type: none"> • Feedback and Comments • Opportunity to get involved 	Arlis Reynolds

10:30 a.m. – 1:00 p.m.

Break



Time	Agenda Item	Discussion Leader(s)
1:00 – 1:30	Deemed Measure Property Data ACT: <ul style="list-style-type: none"> Feedback and Comments 	Ayad Al-Shaikh
1:30 – 2:00	New Measure Process – Measure Review <ul style="list-style-type: none"> Deemed Strategy for the Modified Lighting Calculator (<i>Alfredo Gutierrez – Willdan</i>) ACT: <ul style="list-style-type: none"> Feedback and Comments 	Ayad Al-Shaikh Alfredo Gutierrez – Willdan
2:00 – 2:30	New Measure Process – Measure Review <ul style="list-style-type: none"> Business Energy Reports (<i>Steven Long / Lea Lupkin – ICF</i>) ACT: <ul style="list-style-type: none"> Feedback and Comments 	Ayad Al-Shaikh Steven Long / Lea Lupkin – ICF

Meeting Materials

- Meeting Decks**
 - Integrated Data Flow and Custom Update ([on Website](#))
 - Deemed Lighting Strategy ([by Willdan, on Website](#))
 - New Measure – Modified Lighting Calculator (MLC) Deemed ([on Website](#))
 - New Measure Business Energy Reports ([by ICF, on Website](#))

Meeting Attendees

	<i>In-Person</i>	<i>Via Telephone</i>
<i>Cal TF Staff</i>		Ayad Al-Shaikh Annette Beitel Arlis Reynolds Chau Nguyen Tomas Torres-Garcia
<i>Cal TF Members</i>		Adan Rosillo Alfredo Gutierrez Anders Danryd Andres Fergadiotti Andrew Parker Armen Saiyan Briana Rogers



	<i>In-Person</i>	<i>Via Telephone</i>
		Christopher Rogers Dave Hanna Denis Livchak Eduardo Reynoso Eric Noller Gary Fernstrom George Beeler Jay Bhakta Kristin Heinemeier Lake Casco Steven Long Martin Vu Mike Casey Myrna Dayan Richard Ma Roger Baker Sepideh Shahinfard Spencer Lipp Tom Eckhart
<i>Non-Cal TF Members</i>		CPUC Amy Reardon / CPUC Peter Biermayer / CPUC IOU/POU Afshan Hasan / SCG Ajay Wadhwa / SCE Anthony Zavala / SCG Babak Yazdanpanah / LADWP Henry Liu / PG&E John Zwick / SDG&E Merry Sweeney / SDG&E Thomas Adkins / SMUD Wilfredo Garcia / SCG Wayne Chi / SCG Implementer / 3P / Consultant / Other Angela Crowley / RMS Emily Lemei / NCPA James Hanna / Energy Solutions Lauren Seymour / The Energy Coalition Lea Lupkin / ICF Mohammad Dabbagh / NORESKO Steven Apodaca / RMS



Meeting Notes

I. Opening

Presenter: Annette Beitel

II. Cal TF Visioning for Integrated Data Flow

Presenter: Annette Beitel

III. Custom Activities and Next Steps

Presenter: Arlis Reynolds

Materials: Cal TF Meeting - August 2022_custom slides.pdf

Tom Eckhart: Are you trying to follow what the Pacific Northwest is doing, Regional Technical Forum?

- Annette Beitel: Yes and no. We must adapt to the California environment. For custom projects, we are planning to look at other jurisdictions around the country and learn from them.

Lake Casco: Has there been any consideration for standardizing custom technical review forms/ feedback / level of rigor across all PAs through eTRM? Would all communications, submissions/ resubmission, review docs, and final approvals be stored on eTRM?

- Arlis Reynolds: Yes, we would want to standardize across the state. We have learned through stakeholder discussions that navigating packages to find specific documents can be tough; this is something that the Cal TF and eTRM can help address.

Ajay Wadhwa (via Chat): Is there any consideration of how the custom dispositions become more useful for larger stakeholder group. Typically, context of the dispositions may get lost as soon as we redact information from it. Another thought is that custom project measures may have different requirements based on the context of the project itself. Are we looking to standardize the global requirements of these measures and keep specific where?

Ajay Wadhwa: A lot of dispositions that are issued on the deemed side are applicable to the custom side. However, these are not accessible to custom folks, but can we make sure that these are applied globally; e.g., EUL IDs are affected by deemed dispositions. The disposition database does not have deemed dispositions.



- Arlis Reynolds: My understanding is that you're saying deemed dispositions apply to custom, but custom stakeholders may not be aware of those deemed dispositions. How do you propose we bridge the gap (between deemed and custom dispositions)?
- Ajay Wadhera: Internally would be good, have a person for this [at SCE]. But would be good discuss further.
- Lake Casco: Dispositions are also used in other projects if they are related. Some ideas to bridge the gap are below:
 - o Using tags to search for certain things that will pull up relevant dispositions
 - o Dispositions can be out of date, some other disposition may trump that, dispositions are redacted all the time.
 - o Indicating how often a disposition has been referenced by other projects; some way to help show which dispositions are more or less useful.
- Annette Beitel: We have seen this issue in the deemed side; one thought to consider is to ask the question, are dispositions the best way for them to communicate technical guidance. What about a rulebook? Disposition structure is unique to CA; it is a radical opinion, but this should be discussed.
- John Zwick: We are very familiar with the database, and there are search capabilities but there is not a lot of standardization of the quality of the documents going in, the most important ones do not go to the top. I think it is a matter of bandwidth, maybe that is a role that Cal TF can play.

Armen Saiyan (via Chat): Having an organized set of rules would be very helpful in terms of getting technical guidance. Perhaps the content of the dispositions could be reorganized in that manner to make them more accessible. Also, I would recommend bifurcating technical guidance vs policy guidance (for those entities that are not subject to CPUC policies). Just making sure to keep technical and policy rulesets separately.

Andres Fergadiotti (via Chat): that's a good point. Ideally, we prefer clear ("generalized") guidance from Commission when appropriate. In some cases, dispositions are rather specific to specific measures.

Annette Beitel: For the sake of time, lets keep this discussion ongoing offline with folks that are interested.

Arlis Reynolds: Are there other custom improvements efforts Cal TF should consider for Phase 1? Future?

Adan Rosillo: Would the hybrid measures be handled differently in this database? Are the disposition processes the same or different?

- Arlis Reynolds: There is a broad spectrum of custom measure complexity – from measures that are close deemed to very unique, complex custom measures. Our focus on the measures that can be standardized. It may not make sense to do standardization for all measures since some custom measures truly are very different.



Tom Eckhart (via chat): Question for Armen and the gas utilities and interested parties: How does the proposed hearings to review gas conservation measures by the CPUC impact the planning for gas measures at the TF?

- Arlis: The subcommittee will be looking at this. It's important that our work is focused on measures and outcomes that will be used and useful.

Arlis Reynolds: What other common/useful tools should we include this list as references for the subcommittee?

- Ajay Wadhera: We are hoping to post tools like the MLC in the DEER landing page. I think everything that is used SW should be post on CEDARS.
- Jay Bhakta: A few tools that we might want to add are the Fuel Substitution Calculator (FSC) and the RACC.
 - o Ajay Wadhera: FSC may be posted under a different section.
- Mike Casey (via chat): Not familiar with the PG&E Air Compressor tool. Is it like AirMaster+?
- Wayne Chi (via chat): DOE Tools should be considered on steam and process heating systems.

Arlis Reynolds: Provide input on which measures are good/bad candidates for SW standardization.

- Lake Casco: These seem more like technologies rather than measures. What will be standardized?
 - o Arlis Reynolds: Our goal is to standardize the calculation approach, as well as how documentation is collected and organized.
- John Zwick: The MLC would be a good candidate. Some other PA-specific tools might require CZ specific data that might not be available, the MLC is well established.
 - o Ayad Al-Shaikh: The MLC is a unique case that is already in the process of being transitioned into deemed.
- Armen Saiyan: Does it have to be related to an existing tool? Maybe defining a method or an approach that might not be defined yet. Might be one approach to take. MLC is good, but defining a custom measure methodology, it could give guidance on developing a tool. There could be standardization there.
- John Zwick: This is a challenge for something like this, procedural types, is that there is a lot of CZ-specific data. The methodology that is appropriate for a specific measure may not be readily available; that information is specified in certain dispositions. Not even sure that a disposition in the disposition database may carry the same weight. If someone did a measure one way before, they should be able to do it again.
- Annette Beitel: I honestly think we should be looking at a new solution, a lot of opportunities for standardization.
- John Zwick: Making requirements more easily available. Good thing about deemed is, you do it one way and it will work out for a while.
- Adan Rosillo: There is a lot of subjectivity. The opportunity here would be to ask CPUC for uniformity.



- Lake Casco: If we are trying to standardize things and need a building model, CZ data make things like this very challenging.
- Annette Beitel: This shouldn't be a big barrier; we can create some good progress and build some momentum.
- John Zwick: Do the simple things first, then tackle the more complex cases.
- Annette Beitel: We are collecting ideas and trying to see what the best solution is moving forward.
- Armen Saiyan (via Chat): Sounds like some measure-specific procedures may be buried in dispositions. However, I am concerned that the nature of the dispositions primarily contain commentary on methods that are not acceptable rather than methods that are. I think the intention for this is to detail methods/calculation approaches that would be acceptable.

IV. Deemed Measure Property Data

Presenter: Ayad Al-Shaikh

Materials: Cal TF Meeting Aug - Measure Property Data.pdf

Ajay Wadhwa: How do you produce data that show the nameplate? We are developing a comprehensive checklist and engaging our implementers to see if we are able to collect and it is not an issue down the road.

- Ayad Al-Shaikh: This is what we want people to comment on, and maybe it changes measure by measure.
- Jay Bhakta: We talked a bit about pictures and video when something is not clear, then we have a hierarchy. What happens if you don't have one, then what about the other. The question is what is acceptable, we would need to have some consensus on what should be acceptable to meet some of these criteria.

V. New Measure Process – Measure Review (Modified Lighting Calculator)

Presenter: Ayad Al-Shaikh & Alfredo Gutierrez (Willdan)

*Materials: New Measure - Deemed MLC 8-24-2022.pdf;
DeemedLightingStrategyForCalTF_Final.pdf*

Ajay Wadhwa: There are still a few EUL IDs on the residential side that need to be added. Everything that we are doing currently, updating the standard practices, are for 2023 not what is existing. No controls, only fixtures, and retrofits.

Ed Reynoso (via Chat): Question: If the MLC is custom lighting tool then its subject to CMPA process which includes EM&V plan and pre/post inspections, correct? Then how can the CMPA be applied to an upstream /midstream delivery given the current custom review process?



- Alfredo Gutierrez: This would be for deemed, still a bit unclear on the upstream/midstream.
- Eduardo Reynoso: A lot of these are going to be AR.
- Ajay Wadhwa: We would limit these to NC/NR only.

Lake Casco (via Chat): How was std practice efficacy determined from DLC and ES? a certain percentile?

- Alfredo Gutierrez: Yes, how it was done in the past.
- Ajay Wadhwa: Comprehensive answer, we can discuss offline.
- Sepi Shahinfard (via Chat): 25% is used for standard practice efficacy for each LED product class

Armen Saiyan: Does this effort also include lighting controls, or is it exclusive to lighting fixture replacements/retrofits? Also, will other PAs have full access to the list of the 90M and make requests to expose what is needed? what would that process look like.

- Alfredo Gutierrez: We should chat about possible solutions.
- Ayad Al-Shaikh: Any specific permutation can be generated, so they are all accessible and clearly defined. However, there will not be a full list of the 90M permutations available to download.

Ed Reynoso (via Chat): Question: any potential issues with CEDARS reporting given the number of lighting permutations? Also, the eTRM Measure Detail ID has limited character string -does this trigger revision to measure detail ID?

- Ayad Al-Shaikh (added offline): The intent is to publish measure detail IDs in a way that exposes them – since they were always previously defined. The exposed list could then be pushed to PAs, who could use them for CEDARS claims. In this way, CEDARS can also check/validate these claims items.

VI. New Measure Process – Measure Review (Business Energy Reports)

Presenter: Ayad Al-Shaikh & Steven Long / Lea Lupkin (ICF)

Materials: New Measure - Business Energy Reports 8-24-2022.pdf

Spencer Lipp (via Chat): As these are categorized as custom measures, are these posted to CMPA like other custom measures?

- Ajay Wadhwa: Downstream-Custom, it is a procedural workpaper, it's the reversal. Will still go through the deemed team.
- Spencer Lipp: Sounds like it is creating another channel, does not fit either one.



- Steven Long: It's a different process, but it is already there, HER. It is like an ex-post evaluation.

Roger Baker: We tried doing something like this in Illinois, 12 months before to see what your baseline is, then 12 months after implementation to see what the measure case is but we saw a lot of obstacles, getting the information from/to the right person. Good thing you are only targeting small business.

- Lea Lupkin: We are using the 12-month treatment approach, getting feedback to the decision maker is a challenge in all of these measures. We have integrated a lot of tactics to improve data points.
- Roger Baker: Smaller business, what is the kW range?
- Lea Lupkin: < 100 kW.
- Adan Rosillo: One of the issues with these types of measures is the savings persistence. How do you define a small business? A lot move around or close; have you considered that in the programs? What about persistence?
- Steven Long: There is a study out there for persistence.
- Lea Lupkin: I don't think we will fully understand persistence, until this is implemented for a few years due to treatment.