

Cal TF Meeting August 2022



CALIFORNIA
TECHNICAL FORUM

ANNETTE BEITEL
ARLIS REYNOLDS
AUGUST 25, 2022

Agenda – Morning Session

2

Morning Session: 9:00 – 10:30 am

- Vision for Integrated Data Flow
- Custom Activities
 - Custom Tools
 - Custom Measures
 - Disposition Database
- Next Steps
 - Disposition Database

Afternoon Session: 1:00 – 2:30 pm

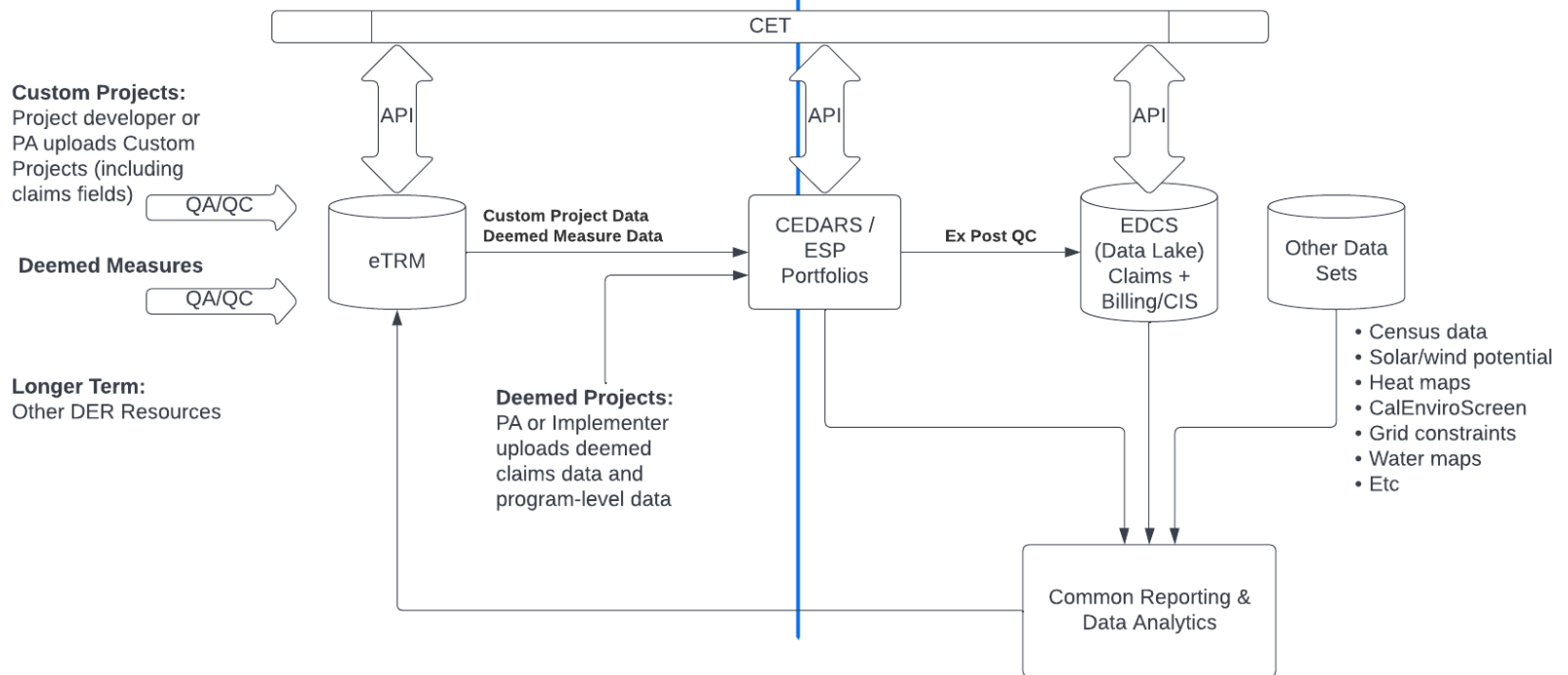
Meeting materials:

- www.caltf.org > TF Meeting Materials

Integrated EE Data Flow

3

Modern, User-Friendly, Integrated User Interface
 Integrated Stakeholder Advisory Group (through Cal TF)



Integrated Custom Data Flow

4

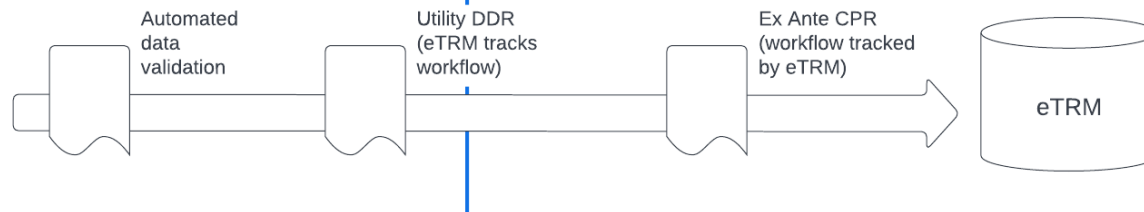
Modern, User-Friendly, Integrated User Interface

Web interface includes:

- All custom requirements
- Statewide tools
- Guidance documents
- Training videos
- Status dashboard
- Reporting/Stats

All Custom Projects housed in eTRM, facilitating Ex Ante and Ex Post analysis, reporting and data analysis across projects

Custom Project*
uploaded by Project Developer (including claims data)



- SW standardized nomenclature
- SW standardized project template, by Project Type
- SW calculation tools, where applicable
- SW standardized data collection requirements, by Project Type
- Standardized / consolidated baseline
- Standardized, approved custom tools

**All PII encrypted*

Benefits for Custom

5



Cost Savings



Time Savings



Customer
Experience



Standardization



Transparency



Stakeholder
Engagement

There remains significant EE savings opportunity for custom measures. We can capture additional EE savings and reduce costs if we 1) organize, simplify, streamline, and standardize custom guidance, tools, and processes and 2) clarify regulatory requirements.

Custom Roadmap – Phase 1

6

Statewide standard “semi-deemed” measures



Statewide standard custom measure nomenclature



eTRM enhancements for Custom Measures



Review regulatory requirements and disposition dbase



eTRM options for project review, CPR/CMPA

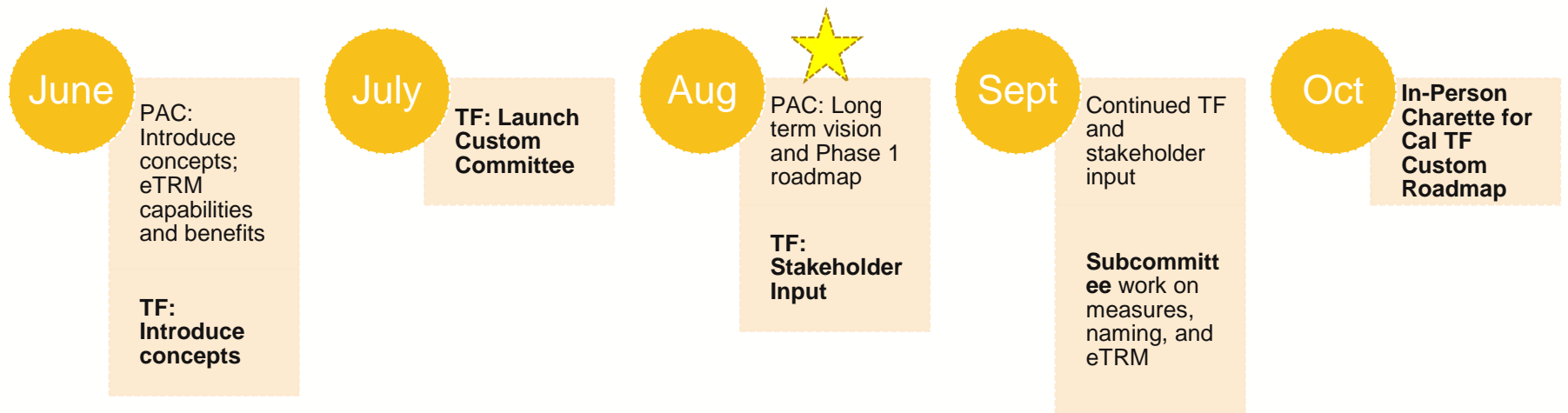


QUESTION: Are there other custom improvement efforts Cal TF should consider for Phase 1? Future?

Recap and Roadmap Planning

7

- Discuss how **Cal TF and** eTRM tools/processes can standardize and streamline custom projects



... continued PAC and stakeholder input...

Please continue to share input ahead of October charette

Custom Tools

Update with comments during meeting

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

- Calculation Tool Archive (CTA)
 - Available to IOUs and CPUC only
- Measure-Specific Tools
 - Customized Calculation Tool (SPC software)
 - (CPUC) Modified Lighting Calculator (MLC)
 - (CPUC) DEER2020 Chiller Workbook
 - (POU TRM) *multiple calculators provided in TRM*
 - (PG&E) AirCompressor-StandardTool
 - (PG&E) HVAC-Standard_Tool
 - (PG&E) Grow_Green_Calculator_Horticulture_Lighting
 - (PG&E) Pool Pump - Standard Tool - v1
 - (PG&E) PumpTool(Custom_Curves)-StandardTool
 - (PG&E) PumpTool(Generic_Curves)-StandardTool
 - (PG&E) Refrigeration-StandardTool
- Other resources
 - Customized Calculated Savings Guidelines

Custom Measures

Update with comments during meeting

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

- Lighting (covered by MLC?)
- Lighting Controls
- Chillers, Process Chillers
- Pumps
- Fans
- Pipe Insulation
- VFD
- Small HVAC
- Boilers and Boiler Add-On
- Retro-commissioning
- Controlled Environment Agriculture
 - (incl. lighting, HVAC, dehumidification, building envelope, process equipment, and controls)
- Fuel Substitution Calculator
 - SCE/CPUC collaboration
- Non-IOU fuel analysis for on-site generation sources

Disposition Database

Update with comments during meeting

QUESTION: How do you use the Disposition Database? What improvements or changes add value?

- www.CAEnergyGuidance.com
 - “This searchable public database contains PA-redacted versions of the CPUC staff dispositions, as well as ISP studies, guidance documents, and other Custom Projects related documents.”
- CPUC disposition data provided:
 - To each PA
 - Public online database (redacted by PA)
 - Summarized in ESPI reports and stakeholder engagement meetings
- TF Discussion:
 - Uses
 - Input on potential improvements for **value** and **useability**

Discuss: General Questions/Input

11

- What other comments/questions come up?



Update with
comments
during meeting

October Charette

- What
 - Charette to discuss and prioritize potential Cal TF and eTRM opportunities to improve the custom programs
- Who
 - TF Members, TF Custom Subcommittee, interested PAC members and stakeholders
- When
 - October 27, 2022
- Why
 - Stakeholder discussions input to shape custom roadmap that addresses key needs and provides most value to custom EE
- Where
 - **TBD In Person, with remote options.**

Next Steps for Custom

13

- Custom Subcommittee (mid September)
 - Custom measures
 - Custom measure nomenclature
 - Input on eTRM enhancements for Custom
- Stakeholder meetings
 - Input for October Charette and Custom Roadmap
- Cal TF Regulatory Review
- eTRM enhancements for Custom

- Email arlis.reynolds@futee.biz to join Custom Subcommittee list
- Share questions and input on custom needs, activities, priorities