Cal TF Update 2022

CALIFORNIA
TECHNICAL FORUM

JUNE 21, 2022

Agenda

- Cal TF Team Introductions (Annette) – 5 min
- RFQ update (Arlis) – 5 min
- Cal TF schedule (Ayad) – 5 min
- eTRM update (Ayad) – 5 min
- New measure process update (Ayad) – 10 min
- Custom update (Arlis) – 20 min
- Next steps (Annette) – 5 min

Core Cal TF Staff

Ayad Al-Shaikh

Arlis Reynolds

Tomas Torres-Garcia

Chau Nguyen

Annette Beitel

RFQ Update

- RFQ for new TF Members
  - www.caltf.org/join-the-tf
  - Responses **due June 24**
  - New TF members will join July meeting

- New areas for 2022-2023 include:
  - New measures and new measure types
  - Custom measure development
  - Closer integration with new measures identified through ET and EPIC

TF Member Information Update

- TF Member Webpage
  - http://www.caltf.org/tf-members
  - Send headshot/bio updates to etrm@futee.biz

- Updates to TF Member Experience
  - Google form to indicate current experience/expertise
    - https://forms.gle/CzFNoVYU4sHzabpu7
  - < 5 minutes to complete

- **Please complete by Thursday, June 30**

Cal TF Schedule for 2022
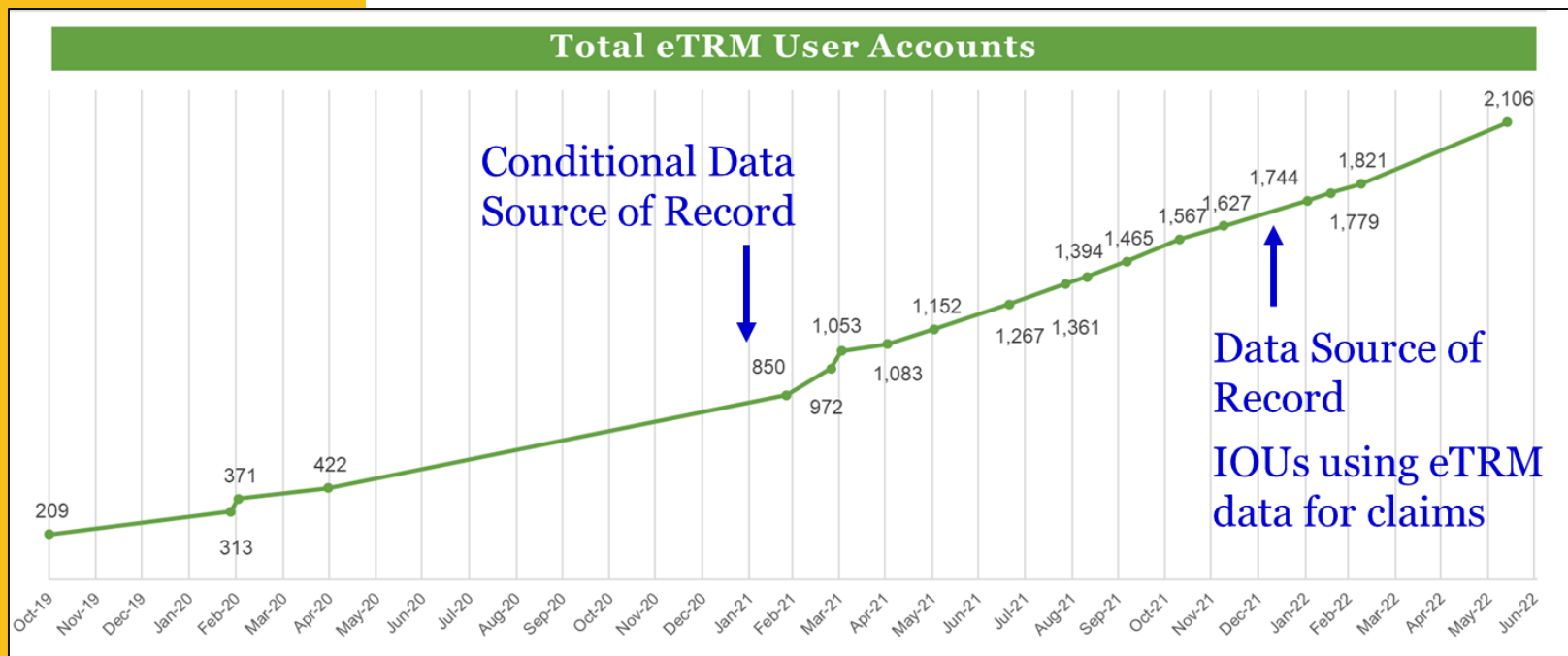
Date	Location
Week of July 25	Online webinar/teleconference
August 25, 2022	Online webinar/teleconference**
September 22, 2022	Online webinar/teleconference**
October 27, 2022	Online webinar/teleconference**
November 17, 2022	Online webinar/teleconference**
December 15, 2022	Online webinar/teleconference**

**May switch to in-person later in 2022

We want your feedback how the team is feeling about having in-person meetings again

eTRM Update

- July Release and New Features
- Growing User Base

Total eTRM User Accounts

- Conditional Data Source of Record
- Data Source of Record
- IOUs using eTRM data for claims

Data points: 209, 313, 371, 422, 850, 972, 1,053, 1,083, 1,152, 1,267, 1,361, 1,394, 1,465, 1,567, 1,627, 1,744, 1,779, 1,821, 2,106

X-axis: Oct-19, Nov-19, Dec-19, Jan-20, Feb-20, Mar-20, Apr-20, May-20, Jun-20, Jul-20, Aug-20, Sep-20, Oct-20, Nov-20, Dec-20, Jan-21, Feb-21, Mar-21, Apr-21, May-21, Jun-21, Jul-21, Aug-21, Sep-21, Oct-21, Nov-21, Dec-21, Jan-22, Feb-22, Mar-22, Apr-22, May-22, Jun-22

We want your feedback on training needs and future features! Contact Ayad or Tomas

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July eTRM Release

- Data
  - Download PA Implementation Codes to know which measures are available
- Reports
  - Measure Package Review Summary
  - Report displays measure versions that are "Under Review" or have a disposition ("Approved" or "Rejected")
- Version History Panel
  - Change description
  - Start / End dates

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New Measures

- New Measure Screening Committee

- New Measure Process Status

- New Measure Cal TF Affirmation Approach
  - New and Some Updates

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New Measure Screening Committee

Voting Members:

- IOUs
  - ❑ Henry Liu / PG&E
  - ❑ Jay Bhakta / SCE
  - ❑ Anders Danryd / SCG
  - ❑ Ed Reynoso / SDG&E
- POUs
  - ❑ Armen Saiyan / LADWP
  - ❑ (open) / SMUD
- CEDMC (*one vote*)
  - ❑ Jim Hanna / Energy Solutions
- NAESCO (*one vote*)
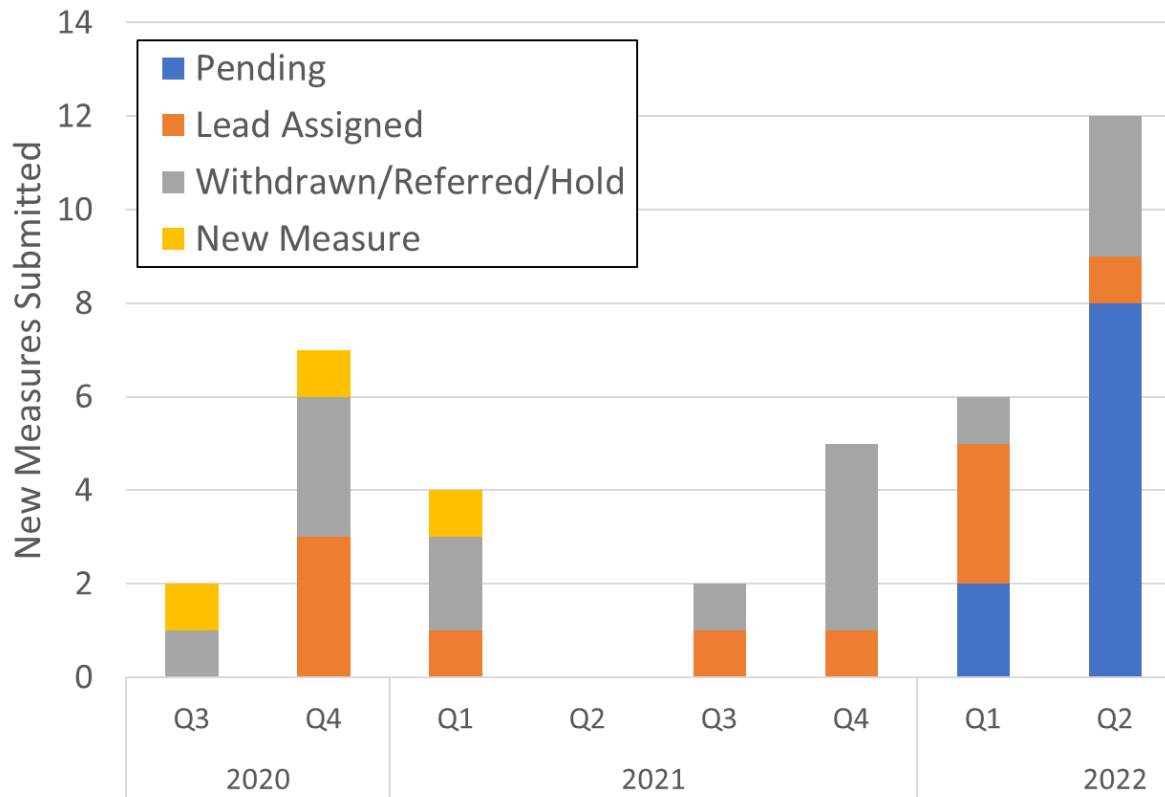 - ❑ Mike Casey / Onsite Energy – A Willdan Company (*formerly*)

Non-Voting Members

- CEC
  - ❑ Yu Hou / CEC
  - ❑ Gabriel Taylor / CEC
  - ❑ Tiffany Mateo / CEC
- CPUC
  - ❑ Staff (tbd)
  - ❑ EAR Team (tbd)
- Independent Advisors
  - ❑ As needed
- Cal TF Staff
  - ❑ Ayad Al-Shaikh
  - ❑ Tomas Torres-Garcia
  - ❑ Chau Nguyen

Process Status

New Measure Status

Legend:
- **Pending** (blue)
- **Lead Assigned** (orange)
- **Withdrawn/Referred/Hold** (gray)
- **New Measure** (yellow)

Y-axis: New Measures Submitted (0–14)

X-axis:
- 2020: Q3, Q4
- 2021: Q1, Q2, Q3, Q4
- 2022: Q1, Q2

- Number of measures into process increasing
  - Source = 2/3 from implementers
  - Rest from IOUs/Manufacturers
- Quality varies dramatically

- Project list will be posted at Cal TF website
- Working on hand-off process to PA Lead
- Will begin "*Early Review & Feedback*" of New Measure ideas with Cal TF Members

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Cal TF Affirmation

Keep stakeholders informed through website, eTRM Reports, or eTRM Announcements

- **Cal TF Affirmation**
  - *Objective*: Request Cal TF member affirmation
  - Present pre-synthesized information at Cal TF Monthly meeting or Subcommittee meeting
- **Inform Stakeholders**
  - *Objective:* Keep stakeholders informed
  - Allows stakeholders to identify exceptions (Measures that should be reviewed)

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Affirmation Approach
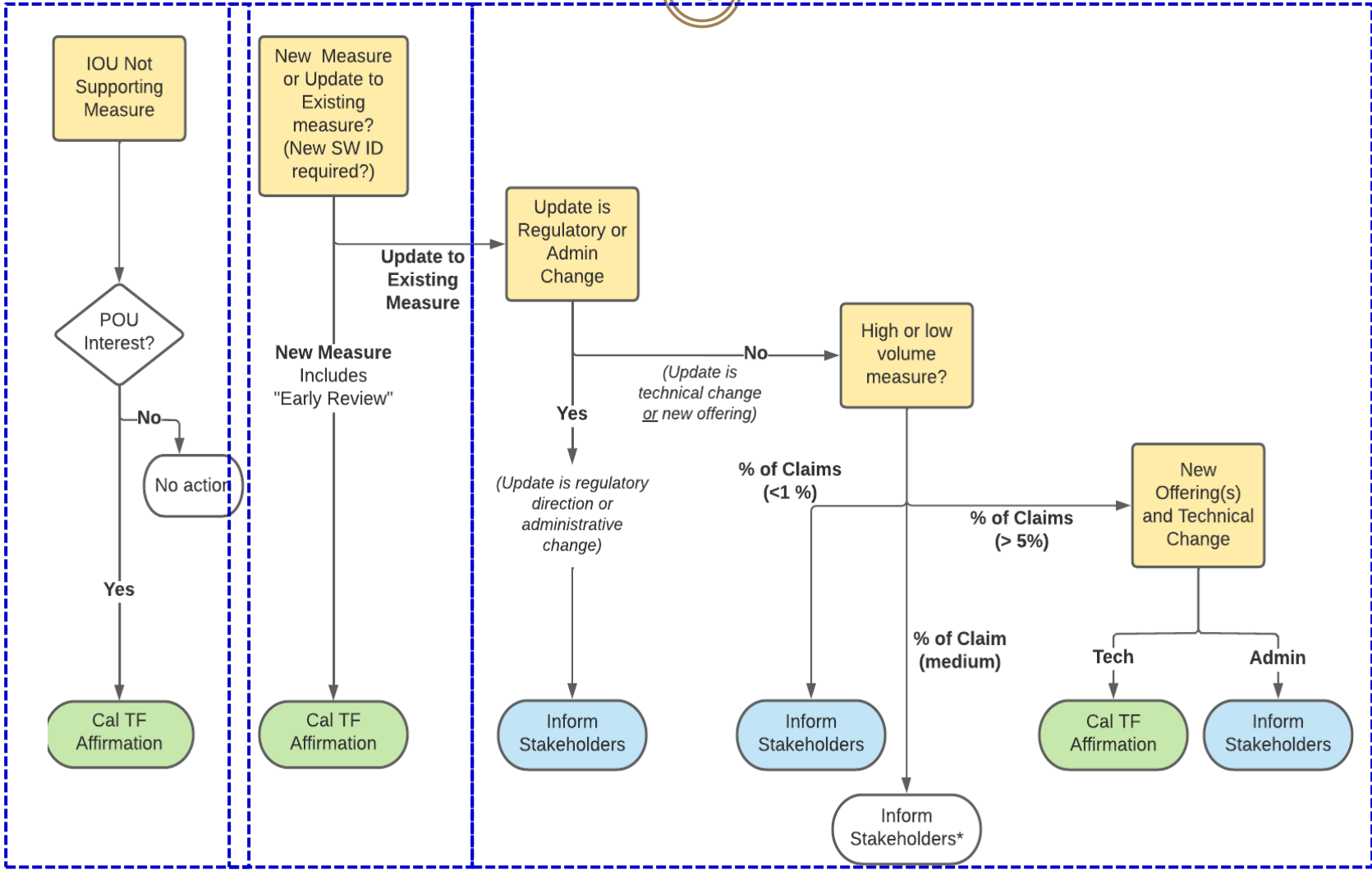
Custom Update

- 2022 Business Plan Goal 5: Continue Development of POU Custom Measures for eTRM
  - Standard methods, tools, and data requirements for "semi-deemed" measures
  - Standard custom measure nomenclature
  - Analysis of how existing eTRM tools could be used to standardize and streamline custom projects
- Project Goals:
  - Reduce costs and time
  - Increase transparency, process efficiency, and consistency
  - Ensure work can be equally used and useful for IOU custom projects – Cal TF value of statewide approaches, to extent possible
  - **More custom projects! More savings from custom!**

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Prior POU Custom Project Analysis

- Reviewed LADWP "Standard Custom" measures, tools and documentation requirements

- Cal TF Staff memo on value of/approach to incorporating LADWP standard custom measures into eTRM

- Other smaller POUs – few custom projects; limited technical review resources

  ❑ Conclusion

    ✖ **Project could increase POU custom projects by making process easier and standardized**

    ✖ Statewide Approach – common nomenclature, standardized tools, calculations and data requirements

Cal TF Staff Analysis To Date

- Reviewed recent analyses and processes used to improve Custom Process and Projects, and to identify ongoing challenges for IOU and 3P Custom Programs
    - CPUC-staff and consultant-led working group efforts to clarify, standardize, streamline custom projects and processes, etc.
    - Resulting Custom Process Review process improvements, including custom templates and guidelines posted on CPUC website
    - SB-1131 timeline requirements
    - 2022 Study of IOU DDR Processes
    - Stakeholders indicate continued desire for improvements

- 5/16 Memo: Leveraging the eTRM for Custom Projects

Leveraging eTRM for Custom

Improvement Opportunity Areas

Overarching	Workflow Process	Project Submittal Quality

Benefits

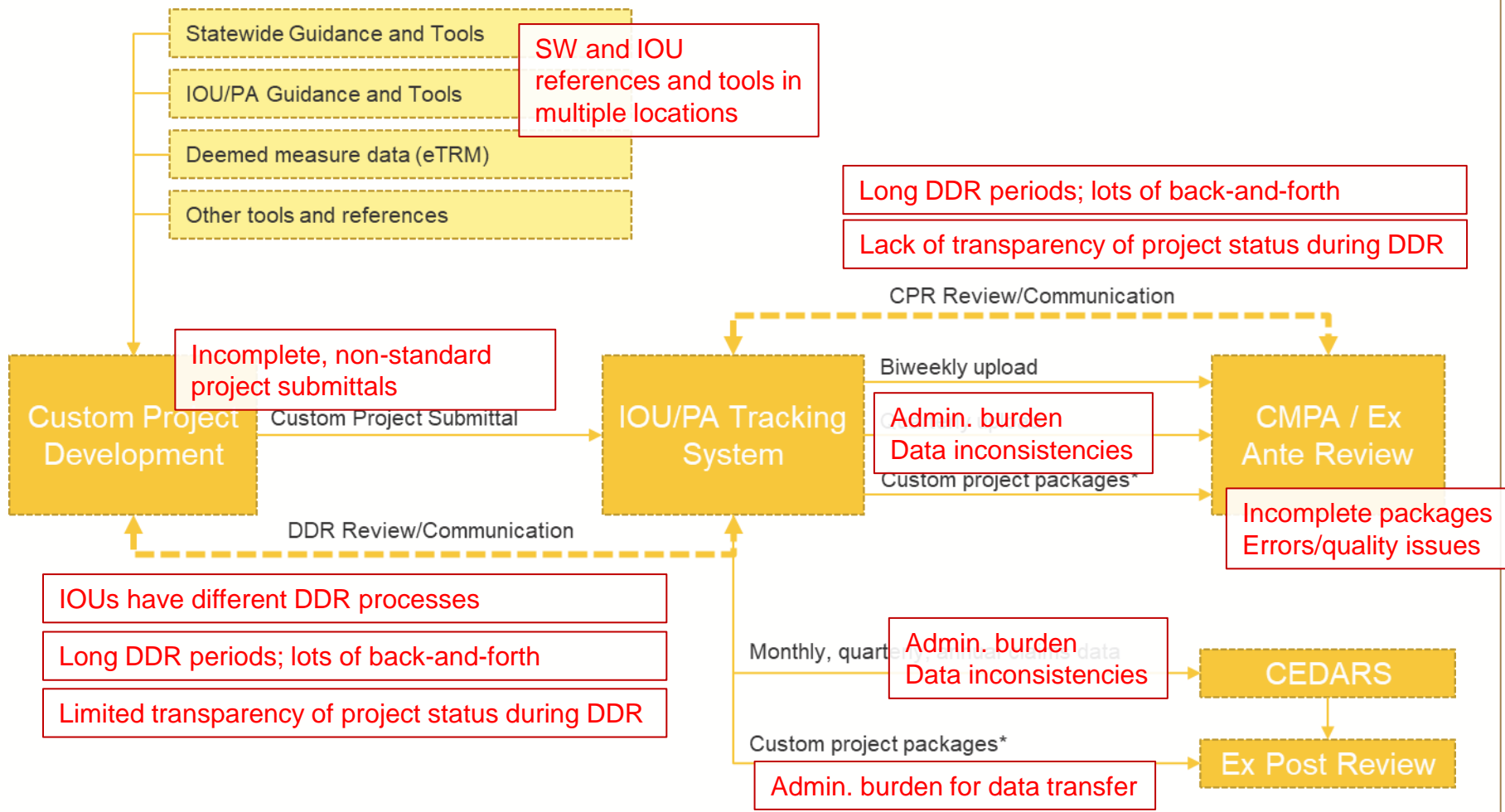| Cost Savings	Time Savings	Transparency	Standardization	Stakeholder Engagement & Customer Experience

Outcomes

Reduced stakeholder frustration	Better project quality	Reduced time/cost for ex ante and ex post reviewers	Higher/broader implementer participation	Higher program throughput and savings

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Existing Challenges

Statewide Guidance and Tools

IOU/PA Guidance and Tools

Deemed measure data (eTRM)

Other tools and references

SW and IOU references and tools in multiple locations

Long DDR periods; lots of back-and-forth

Lack of transparency of project status during DDR

CPR Review/Communication

Incomplete, non-standard project submittals

Custom Project Development

Custom Project Submittal

IOU/PA Tracking System

Biweekly upload

Admin. burden Data inconsistencies

Custom project packages*

CMPA / Ex Ante Review

Incomplete packages Errors/quality issues

DDR Review/Communication

IOUs have different DDR processes

Long DDR periods; lots of back-and-forth

Limited transparency of project status during DDR

Monthly, quarterly

Admin. burden Data inconsistencies

CEDARS

Custom project packages*

Ex Post Review

Admin. burden for data transfer

eTRM Opportunity

22

Statewide Guidance and Tools

IOU/PA Guidance and Tools

Deemed measure data (eTRM)

Other tools and references

Centralized, statewide documentation with version control

Custom Project Development

Custom Project Submittal

Standardized project templates; defined submittal requirements; data validation; common measure naming; alignment with deemed

DDR Review/Communication

CPR Review/Communication

Centralized project tracking/reporting

All custom data in a single repository

User-friendly access to project status/info

Streamlined, transparent workflow

CMPA / Ex Ante Review

Monthly, quarterly, annual claims data

Automated/improved data transfer for reporting and ex post review

Custom project packages

CEDARS

Ex Post Review

Next Steps for Cal TF

- <u>Ongoing Stakeholder Input</u>: Continue to solicit input/comment from key stakeholders to develop/refine
  - ❑ White Paper(s)
  - ❑ Graphical models
  - ❑ Identify value and barriers/challenges to moving forward

- <u>Engineering</u>: Collect custom tools/data requirements (IOU/POU). Review/standardize through Cal TF subcommittees

- <u>eTRM Updates</u>: Refine enhancements to eTRM so custom tools can be uploaded, and later possibly customer projects

What tools do you have that can be recommended for Statewide Semi-Deemed measures?

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Next Steps

- Our next Cal TF Meeting:

  Week of July 25th

- Feedback requests:
  - Updates to TF Member Experience (Google form to be sent)
  - How does the team feel about in-person meetings?
  - Additional needs for eTRM training or new enhancements?
  - Get involved with custom analysis

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