

# Cal TF Meeting September 2022



**SEPTEMBER 22, 2022**

# Agenda

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## **Morning Session: 9:00 a.m. – 11:00 a.m.**

- Quick Updates
- Custom Activities Update/Discussion
- Deemed Measure Property Data

## **Afternoon Session: 11:30 – 1:00 pm**

- New Measure Process:
- eTRM Release Documentation
- Cal TF 2023 Business Plan
- Closing
  
- **Today's meeting will be recorded.**
- **Please use mute when not speaking.**

## **Meeting materials:**

- [www.caltf.org](http://www.caltf.org) > TF Meeting Materials

# Updates (1 of 4)

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- Cal TF Website
  - ❑ New Measure List webpage
  - ❑ <http://www.caltf.org/new-measure-list>

Dynamic list of proposals submitted to the Measure Screening Committee, with status and other info

## New Measure Development Library

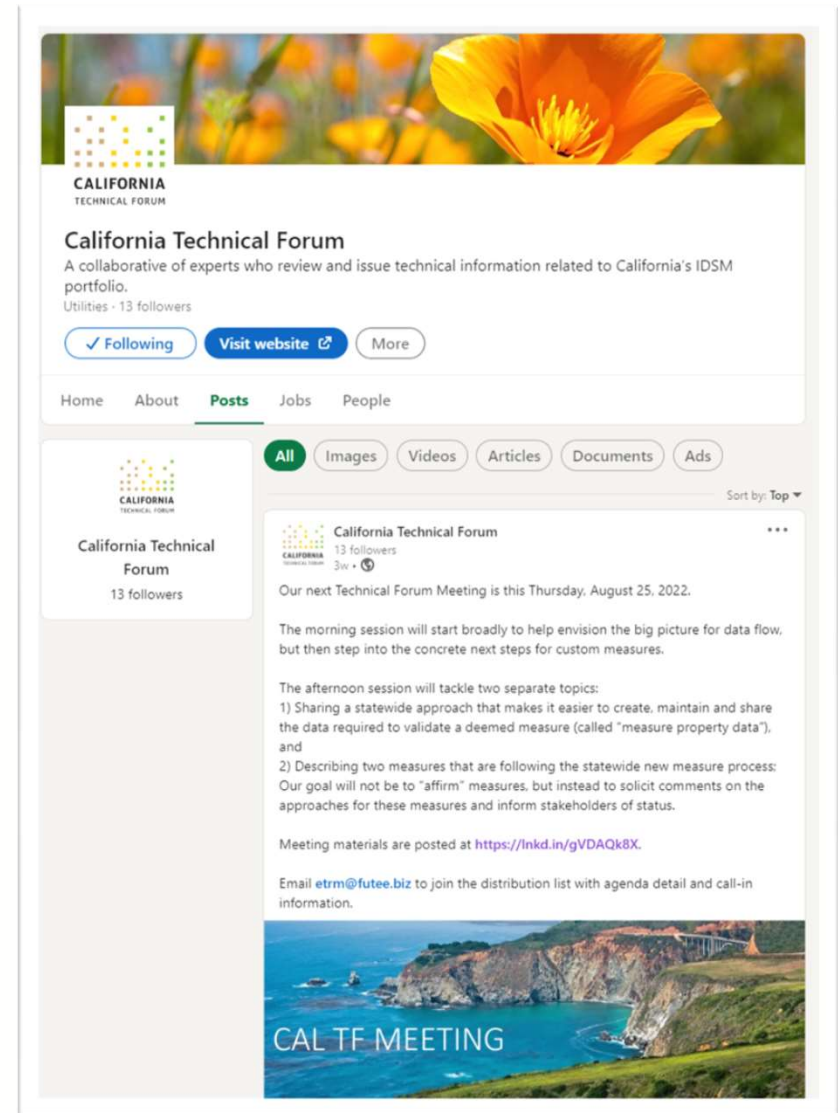
Name	Source	Status	Lead IOU	Stage	Submittal Date	Modified	Statewide Measure ID
SWNM043 - Weather-Based Irrigation Controllers - WEN	3P/Implementer	Affirmed	SDG&E	Measure Development	9/8/2022	9/16/2022	
SWNM042 - High Efficiency Toilets - WEN	3P/Implementer	Affirmed	SCG	Measure Development	9/8/2022	9/16/2022	
SWNM041 - Automatic Control Receptacle	3P/Implementer	Pending	SDG&E	Measure Screening Committee	9/8/2022	9/15/2022	
SWNM040 - Switch Reluctance Motor	3P/Implementer	Affirmed		Measure Screening Committee	8/1/2022	9/15/2022	
SWNM039 - Rotisserie Oven	3P/Implementer	Pending		Measure Screening Committee	7/1/2022	7/25/2022	
SWNM038 - Res NC, Electrification Package	3P/Implementer	Affirmed	PG&E	Measure Development	6/1/2022	7/29/2022	
SWNM037 - Steam Table, Commercial Ventilation	3P/Implementer	Affirmed	SCG	Measure Development	5/1/2022	7/25/2022	
SWNM036 - Demand Controlled	Manufacturer	Pending	SCE	Measure Screening Committee	6/1/2022	7/25/2022	
SWNM035 - Soup Warmer, Commercial	3P/Implementer	Affirmed	SCG	Measure Development	5/1/2022	7/25/2022	
SWNM034 - Cooktop, Commercial	3P/Implementer	Affirmed	SCG	Measure Development	5/1/2022	7/25/2022	
SWNM033 - RCA+	Manufacturer	Pending		Measure Screening Committee	5/1/2022	7/25/2022	SWSV006-01
SWNM032 - Radiant Conveyor Toaster	3P/Implementer	Affirmed	SCG	Measure Development	4/1/2022	7/25/2022	SWFS023-01
SWNM031 - VFD on Rodbeam Pumps	3P/Implementer	Pending		Measure Screening Committee	4/1/2022	7/25/2022	
SWNM030 - Hot Food Holding Bin	3P/Implementer	Affirmed	SCG	Measure Development	3/1/2022	7/25/2022	
SWNM029 - Building Automation - Passive Logic	Manufacturer	Withdrawn		Withdrawn	3/1/2022	7/25/2022	
SWNM028 - Modified Lighting Calculator	3P/Implementer	Affirmed	SCE	Measure Development	3/1/2022	7/25/2022	
SWNM027 - Occupancy-based Fan	Manufacturer	Affirmed		Measure Development	3/1/2022	7/25/2022	SWHC009-02

Source: All | Status: All | Lead IOU: All | Submittal Date: Y, M, D: All | Date Modified: Y, M, D: All

# Updates (2 of 4)

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- Cal TF LinkedIn Site
  - ❑ Increase stakeholder awareness and engagement with Cal TF resources and activities (meetings, subcommittees, and trainings)
  - ❑ [www.linkedin.com/company/caltf](http://www.linkedin.com/company/caltf)
  - ❑ Please follow and share



The screenshot shows the LinkedIn profile for the California Technical Forum. The profile header includes the logo and the text "California Technical Forum" and "A collaborative of experts who review and issue technical information related to California's IDSM portfolio." Below the header, there are navigation tabs for "Home", "About", "Posts", "Jobs", and "People". The "Posts" tab is selected, showing a post from the California Technical Forum. The post text reads: "Our next Technical Forum Meeting is this Thursday, August 25, 2022. The morning session will start broadly to help envision the big picture for data flow, but then step into the concrete next steps for custom measures. The afternoon session will tackle two separate topics: 1) Sharing a statewide approach that makes it easier to create, maintain and share the data required to validate a deemed measure (called 'measure property data'), and 2) Describing two measures that are following the statewide new measure process: Our goal will not be to 'affirm' measures, but instead to solicit comments on the approaches for these measures and inform stakeholders of status. Meeting materials are posted at <https://lnkd.in/gVDAQk8X>. Email [etrm@futee.biz](mailto:etrm@futee.biz) to join the distribution list with agenda detail and call-in information." Below the text is a banner image of a coastal landscape with the text "CAL TF MEETING".

# Updates (3 of 4)

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- eTRM Training
  - User Guide and training videos: [www.caetrm.com/user-guide/](http://www.caetrm.com/user-guide/)
  - Interested in eTRM 101 training?
  - Consider your and other stakeholder eTRM training needs for afternoon discussion

# Updates (4 of 4)

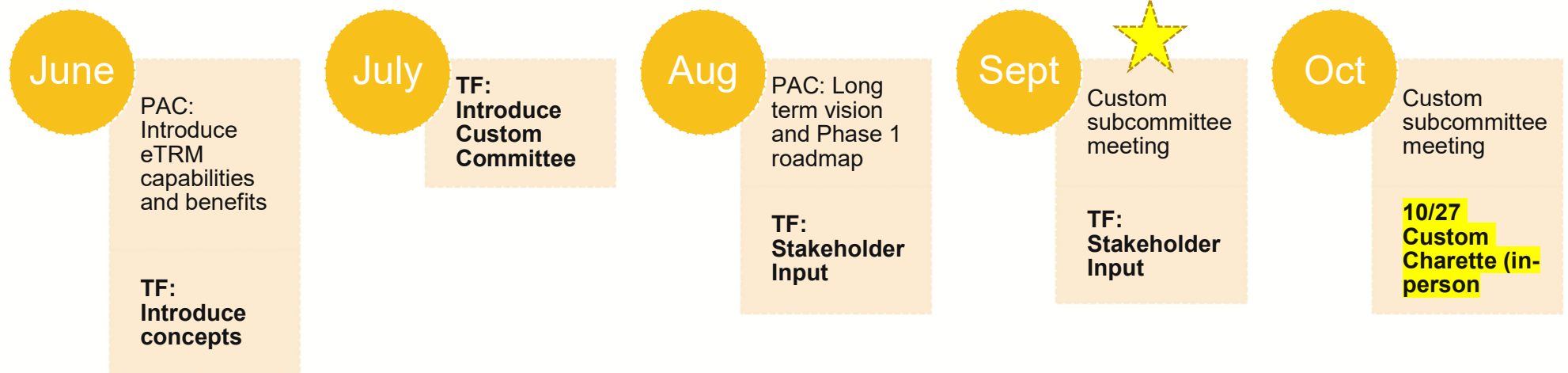
6

- Return to In-Person Meetings
  - October (10/27)
    - ✦ LACI, Los Angeles
    - ✦ 10am to 5pm; followed by Happy Hour
  - November (11/17)
    - ✦ Northern California (planned, subject to change)
  - December (12/15)
    - ✦ Southern California (planned, subject to change)
  
- We will always have a remote participation option
- Non-TF members invited pending capacity limitations

# Custom Recap

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- 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 Activities Update

- Updates
  - Subcommittee Meeting (9/13)
  - Next Subcommittee Meeting (10/5)
  - 10/27 Custom Charette (Los Angeles)
    - ✦ Joint TF + Custom Subcommittee
    - ✦ Other stakeholders: remote participation available; email Arlis to attend in-person
  - Subcommittee SharePoint Site
- Discussion/Input
  - Selected Custom Measures
  - eTRM enhancements
  - Custom Charette Agenda/Topics



## Selected Custom Measures

Pump Overhaul

Chillers

Process Boilers + Pipe Insulation + AOE

RCx

Small HVAC

VFD on HVAC Fans

Pumps

### Stakeholder questions for selected measures (see list on the left)

- For each measure:
  - What stakeholders have important expertise or history in the measures and should be consulted?
  - What stakeholders are implementing this measure now and may have useful data and practical insights?
  - What resources/references, tools, resolutions, dispositions, etc. should the Measure Champions be aware of?
  - Are there any other key considerations in developing a SW standard approach and calculation tool?
  - Do you foresee any significant challenges in standardizing this measure?
- Are there any other measures we should consider in this first round of measure standardization efforts?

Share input with [arlis.reynolds@futee.biz](mailto:arlis.reynolds@futee.biz) by Friday 9/23

Upload materials to Custom Subcommittee SharePoint

# Custom Measures

Objective: develop standard savings estimation methods, calculation tools, and data requirements for select custom measures

## Measure Standardization Approach [draft]

start

**ID measures for statewide standardization**

- Subcommittee identify Measure Champion (MC)
- Stakeholders share resources, experts, background information, etc.
  - Upload key resources to SharePoint
- MC develop initial draft for SW recommendations
  - Measure definition (scope and boundaries)
  - Measure characterization
  - Savings estimation methods
  - Guidelines for site-specific parameters
  - Data collection and M&V requirements
  - Determine whether tool is needed
- Input from TF, CPUC, other stakeholders
- MC revise based on feedback
- Subcommittee affirmation
- Send recommendation to the TF for review/approval
- Publish custom measure in the eTRM
- Request CPUC Early Opinion on “hybrid” approach



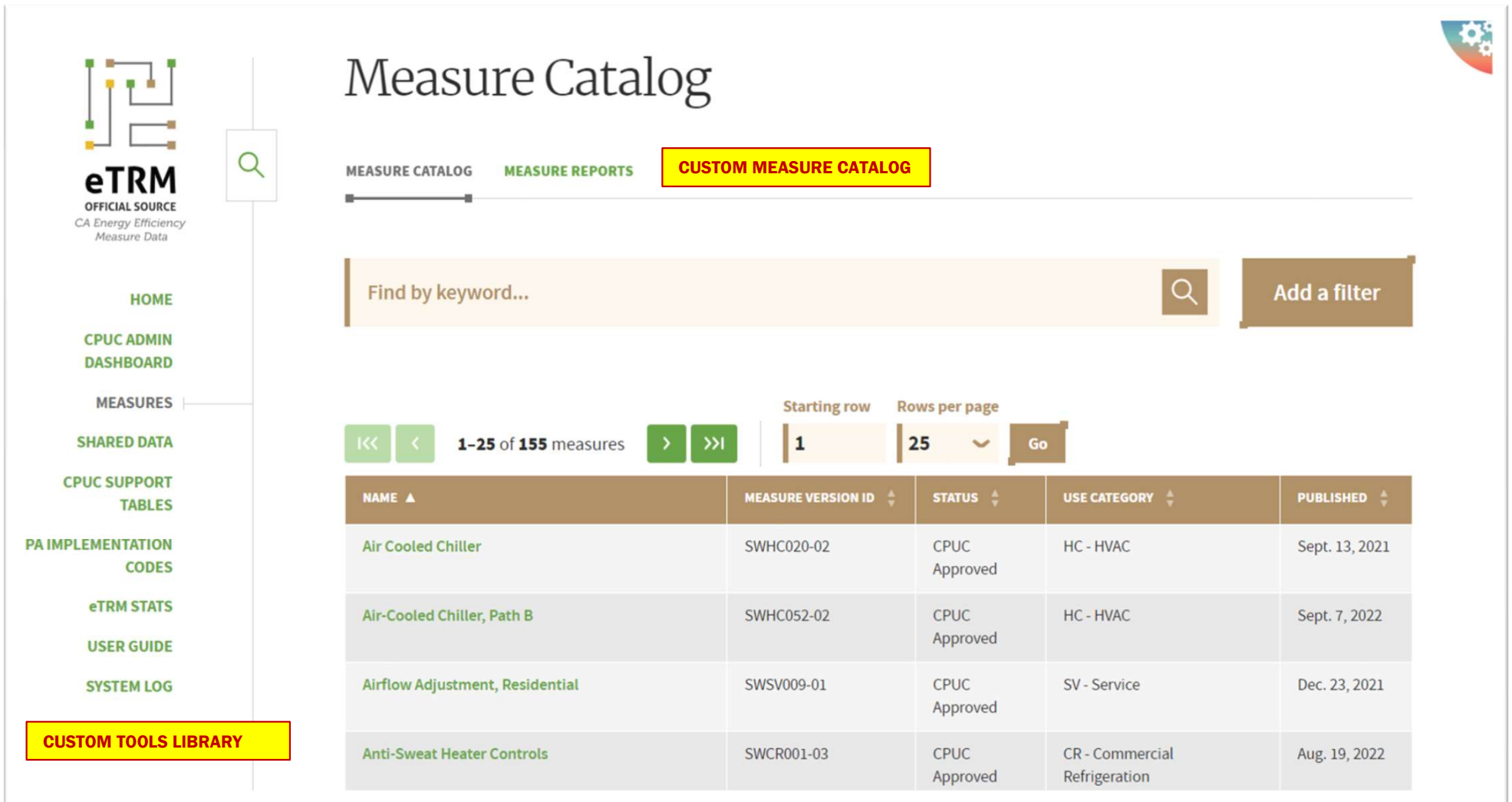
goal

**Cal TF approved savings methods, hosted in the eTRM for transparency and access**

# eTRM Enhancements

- Initial Approach
  - A repository with version controls for external calculators
  - eTRM measure template – provides clear, consistent guidance on statewide standardized methods and requirements, with and access to tools
- Simple eTRM Enhancements
  - Custom measure catalog
  - Top-level custom tools library
  - Badge to indicate custom measures
  - Standardize eTRM layout to accommodate custom measures
  - Download button to download a calculator
- Input/Questions
  - Today
  - Next Custom Subcommittee meeting (10/5, 1-3pm)
  - Email [chau.nguyen@futee.biz](mailto:chau.nguyen@futee.biz)

# eTRM Enhancements for Custom



The screenshot shows the eTRM Measure Catalog interface. On the left is a navigation sidebar with links: HOME, CPUC ADMIN DASHBOARD, MEASURES, SHARED DATA, CPUC SUPPORT TABLES, PA IMPLEMENTATION CODES, eTRM STATS, USER GUIDE, and SYSTEM LOG. A yellow box highlights 'CUSTOM TOOLS LIBRARY' at the bottom of the sidebar. The main content area is titled 'Measure Catalog' and has three tabs: 'MEASURE CATALOG', 'MEASURE REPORTS', and 'CUSTOM MEASURE CATALOG' (highlighted in yellow). Below the tabs is a search bar with the text 'Find by keyword...' and a search icon, and a button labeled 'Add a filter'. Below the search bar is a pagination control showing '1-25 of 155 measures', 'Starting row 1', 'Rows per page 25', and a 'Go' button. Below the pagination is a table with the following data:

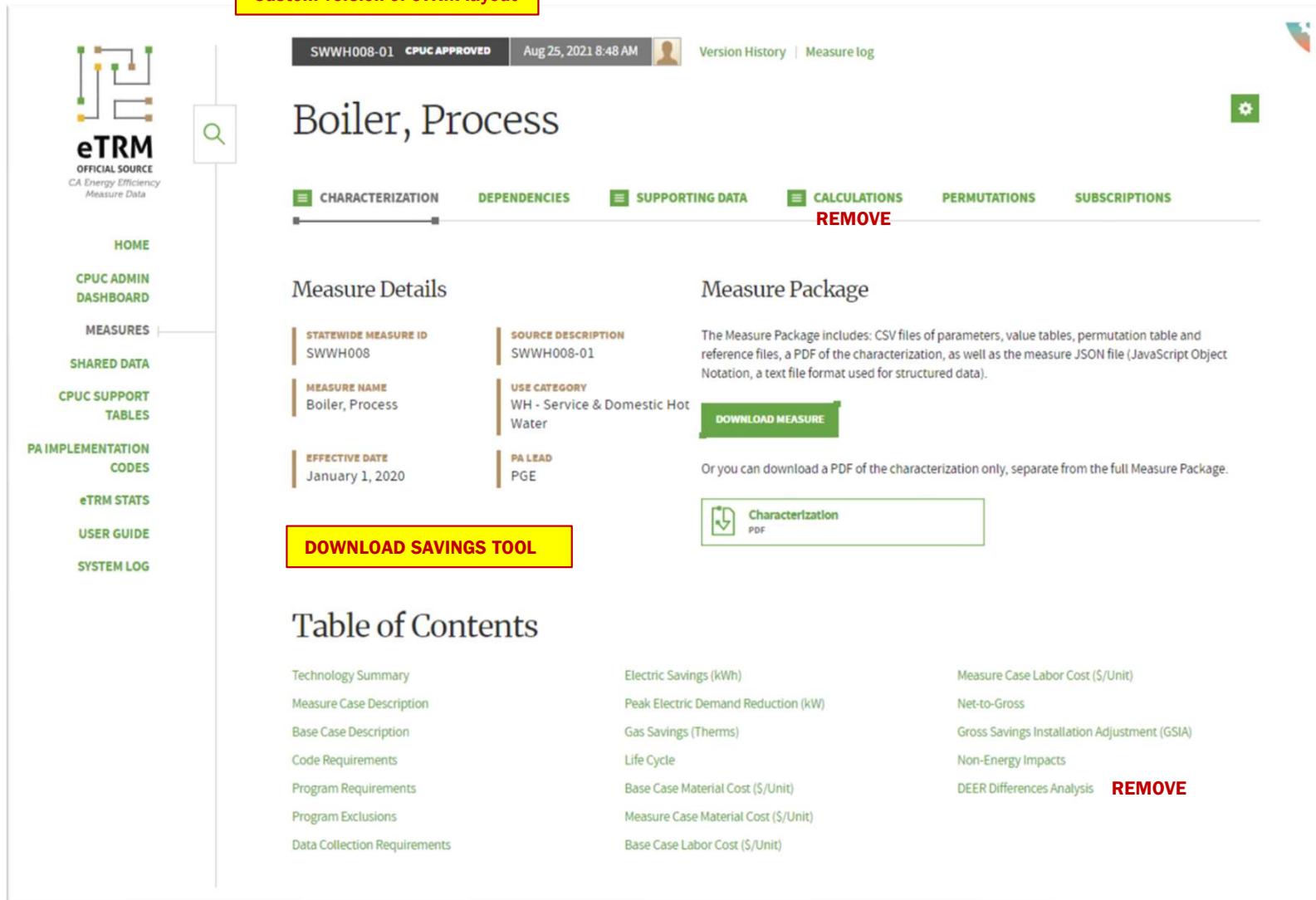
NAME ▲	MEASURE VERSION ID ▲	STATUS ▲	USE CATEGORY ▲	PUBLISHED ▲
Air Cooled Chiller	SWHC020-02	CPUC Approved	HC - HVAC	Sept. 13, 2021
Air-Cooled Chiller, Path B	SWHC052-02	CPUC Approved	HC - HVAC	Sept. 7, 2022
Airflow Adjustment, Residential	SWSV009-01	CPUC Approved	SV - Service	Dec. 23, 2021
Anti-Sweat Heater Controls	SWCR001-03	CPUC Approved	CR - Commercial Refrigeration	Aug. 19, 2022

# eTRM Enhancements for Custom

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# eTRM Enhancements for Custom

Custom version of eTRM layout



The screenshot shows the eTRM web application interface for a measure named "Boiler, Process". The interface includes a left-hand navigation menu with options like HOME, CPUC ADMIN DASHBOARD, MEASURES, SHARED DATA, CPUC SUPPORT TABLES, PA IMPLEMENTATION CODES, eTRM STATS, USER GUIDE, and SYSTEM LOG. The main content area is titled "Boiler, Process" and features a breadcrumb trail: CHARACTERIZATION > DEPENDENCIES > SUPPORTING DATA > CALCULATIONS > REMOVE > PERMUTATIONS > SUBSCRIPTIONS. The "Boiler, Process" page is divided into two main sections: "Measure Details" and "Measure Package".

**Measure Details:**

<b>STATEWIDE MEASURE ID</b> SWWH008	<b>SOURCE DESCRIPTION</b> SWWH008-01
<b>MEASURE NAME</b> Boiler, Process	<b>USE CATEGORY</b> WH - Service & Domestic Hot Water
<b>EFFECTIVE DATE</b> January 1, 2020	<b>PA LEAD</b> PGE

**Measure Package:**

The Measure Package includes: CSV files of parameters, value tables, permutation table and reference files, a PDF of the characterization, as well as the measure JSON file (JavaScript Object Notation, a text file format used for structured data).

Or you can download a PDF of the characterization only, separate from the full Measure Package.

**DOWNLOAD SAVINGS TOOL**

**Table of Contents:**

Technology Summary	Electric Savings (kWh)	Measure Case Labor Cost (\$/Unit)
Measure Case Description	Peak Electric Demand Reduction (kW)	Net-to-Gross
Base Case Description	Gas Savings (Therms)	Gross Savings Installation Adjustment (GSIA)
Code Requirements	Life Cycle	Non-Energy Impacts
Program Requirements	Base Case Material Cost (\$/Unit)	DEER Differences Analysis <b>REMOVE</b>
Program Exclusions	Measure Case Material Cost (\$/Unit)	
Data Collection Requirements	Base Case Labor Cost (\$/Unit)	

# eTRM Enhancements for Custom

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- Input/Questions

- Today
- Next Custom Subcommittee meeting (10/5, 1-3pm)
- Email [chau.nguyen@futee.biz](mailto:chau.nguyen@futee.biz)

# October Charette

Thursday, 10/27

10am-5pm (followed by  
Cal TF Happy Hour)

LACI, Los Angeles  
(remote options)

Topic: Custom Charette  
to shape Custom  
Roadmap

- Custom Charette
  - Stakeholder discussions to shape long term custom roadmap for Cal TF/eTRM
- Goal
  - Develop common understanding of issues, opportunities, and challenges
  - Achieve shared vision for custom improvements and draft custom roadmap
  - Understand steps required to arrive at the shared vision
- Topics
  - Integrated Custom Data Flow
  - SW Standard Measures in the eTRM
  - SW Standard Custom Nomenclature
  - SW templates and organizing customer/PII data
  - eTRM enhancements for custom measures,
  - eTRM enhancements for custom projects and technical review workflows
  - Regulatory Review
  - Disposition Database

RSVP and share input: [arlis.reynolds@futee.biz](mailto:arlis.reynolds@futee.biz)