Cal TF Meeting
September 2022

SEPTEMBER 22, 2022

Agenda

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 > TF Meeting Materials

Updates (1 of 4)

- 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

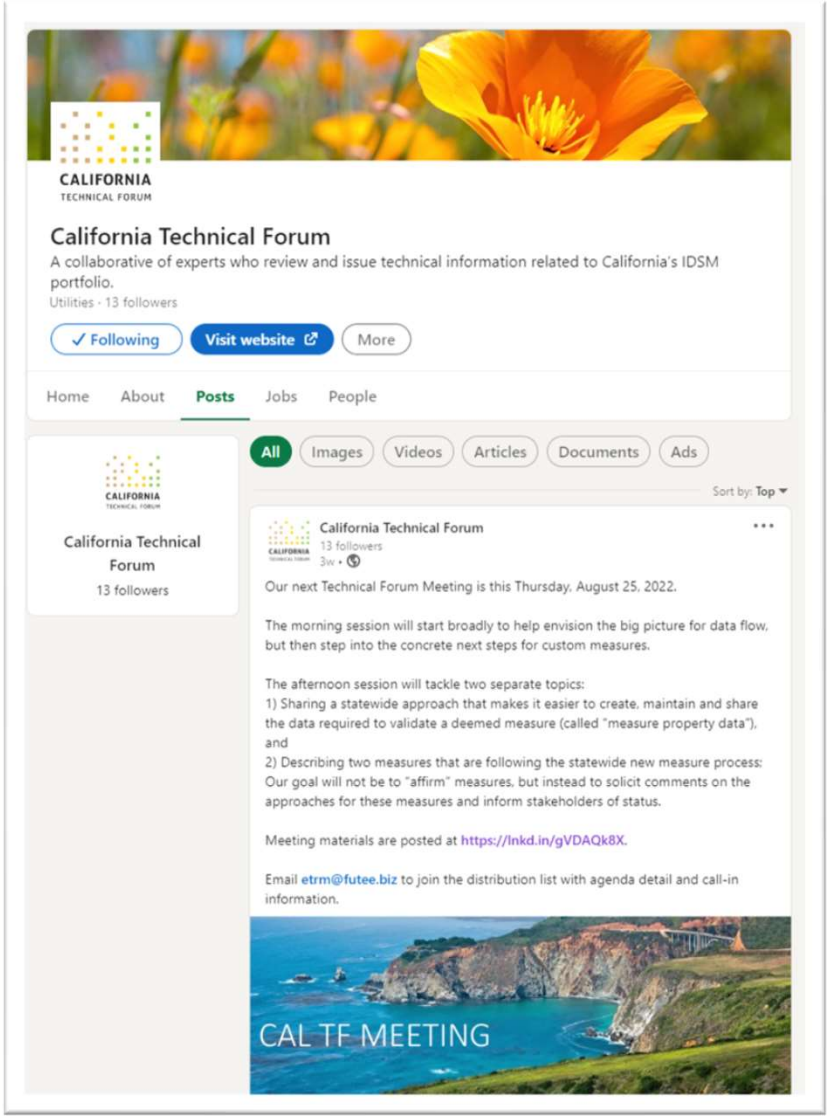
New Measure Development Library

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	3P/Implementer	Affirmed	SCG	Measure Development	5/1/2022	7/25/2022	
SWNM036 - Demand Controlled Ventilation	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)

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



Updates (3 of 4)

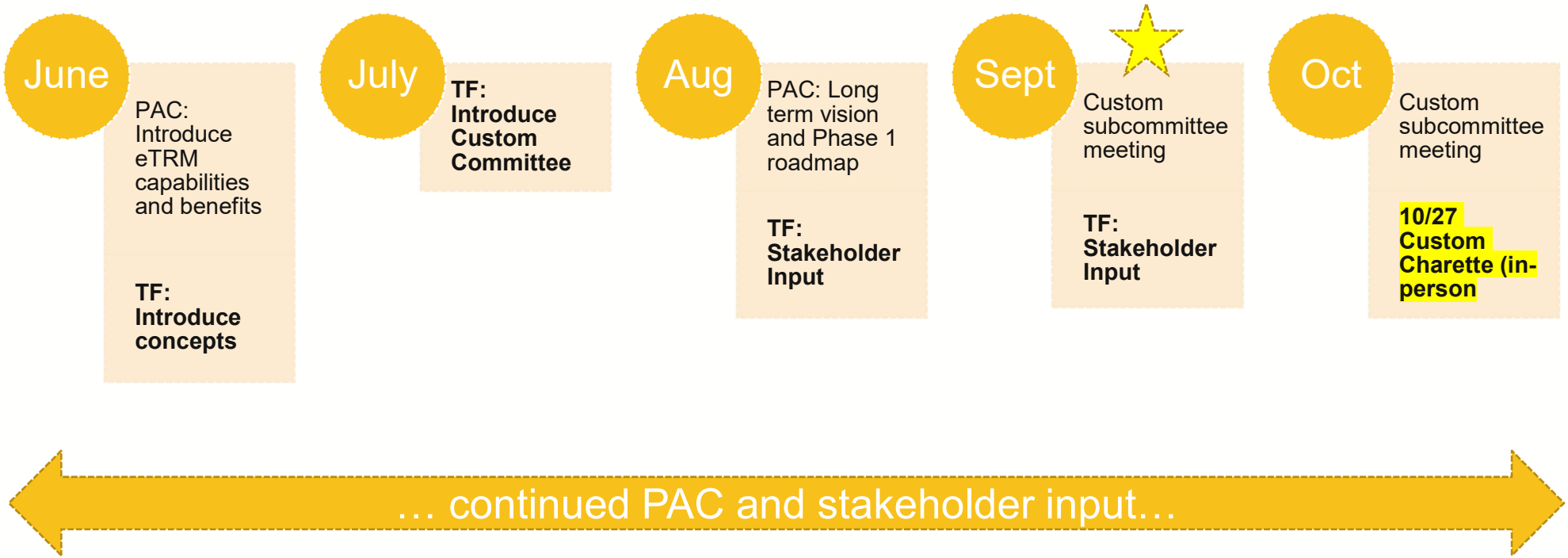
- eTRM Training
  - User Guide and training videos: www.caetrm.com/user-guide/
  - Interested in eTRM 101 training?
  - Consider your and other stakeholder eTRM training needs for afternoon discussion

Updates (4 of 4)

- 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

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



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

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Selected Custom Measures

Pump Overhaul

Chillers

Process Boilers + Pipe Insulation + AOE

RCx

Small HVAC

VFD on HVAC Fans

Pumps

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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 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**

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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

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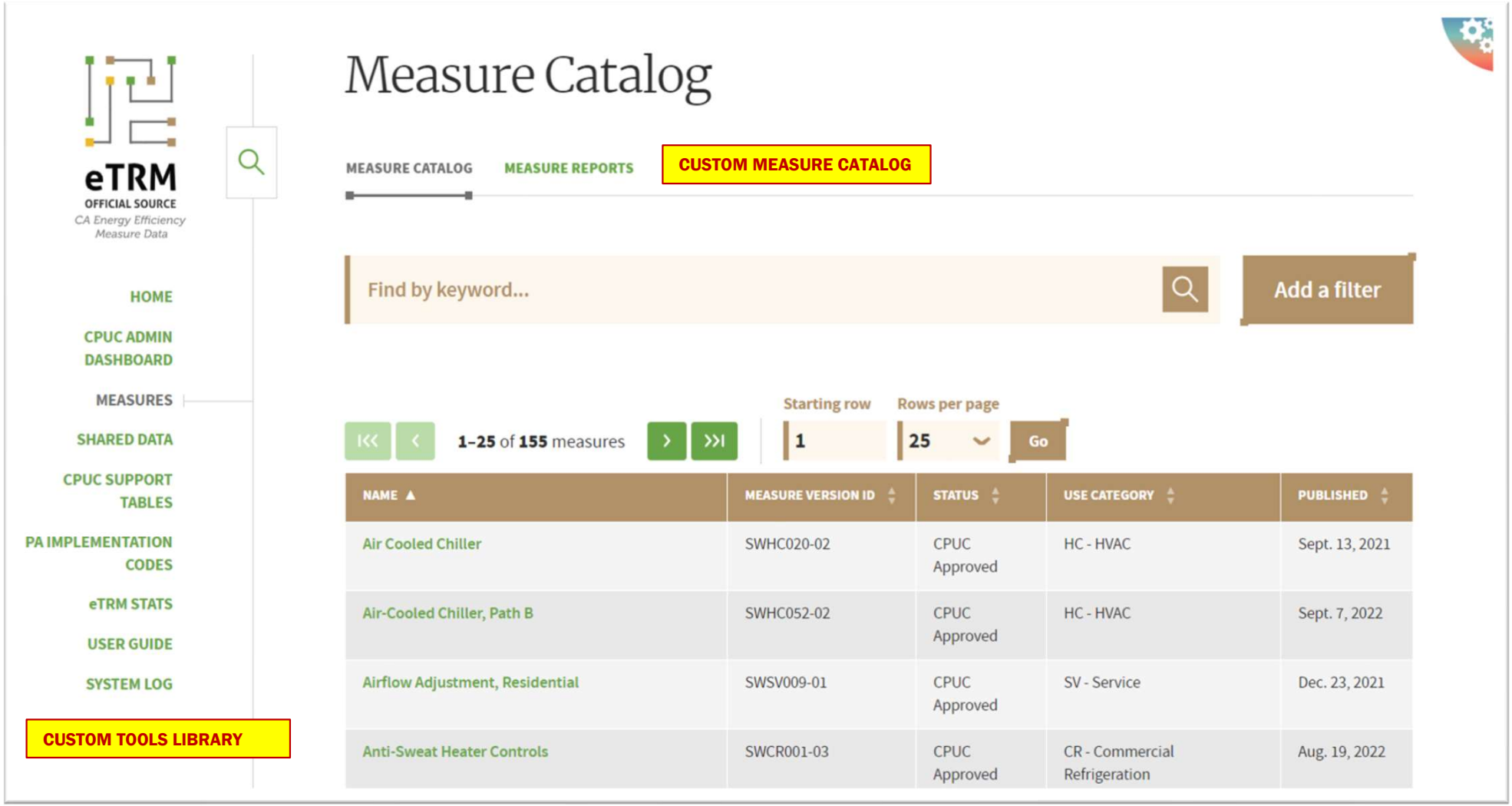
eTRM Enhancements for Custom



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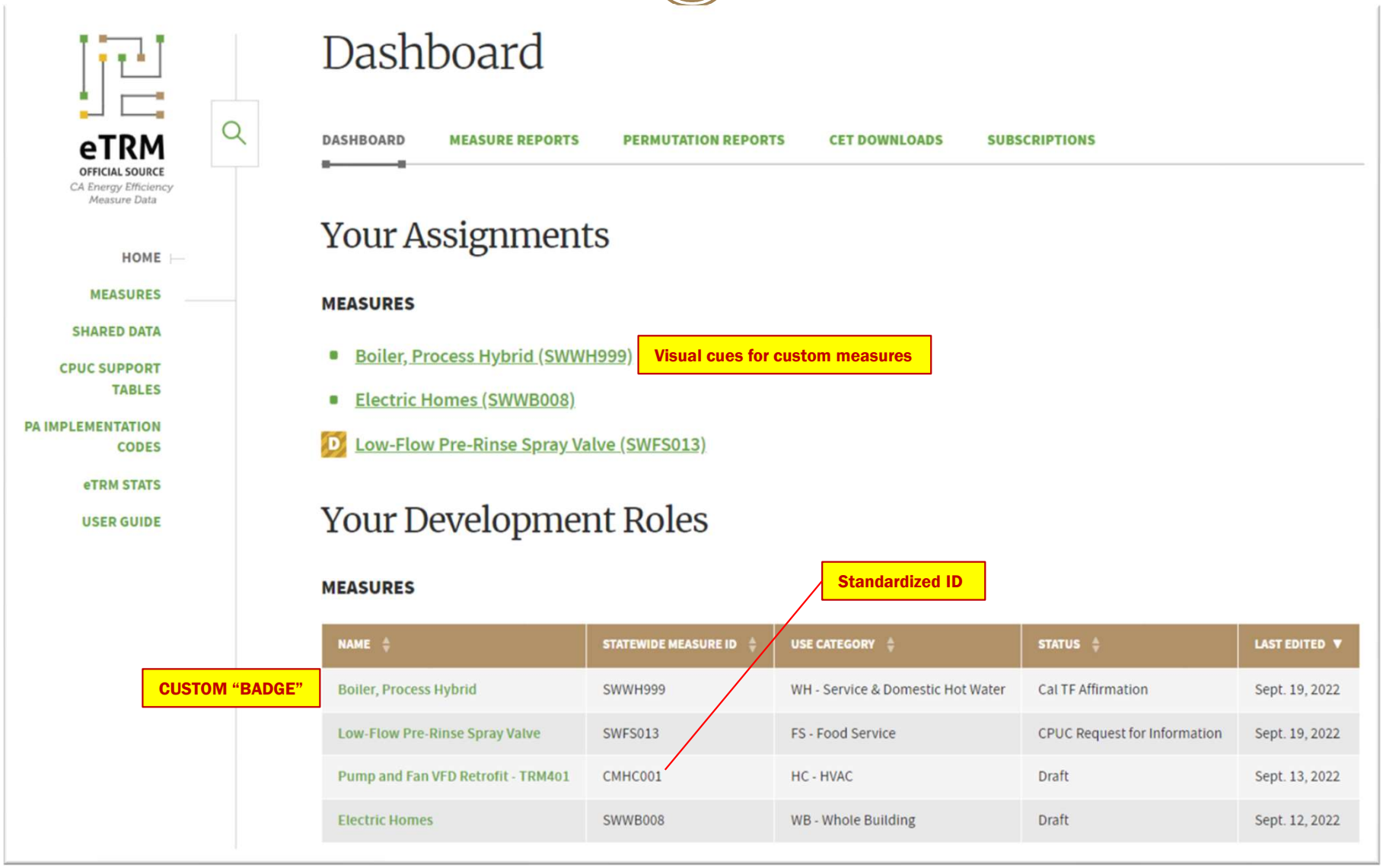
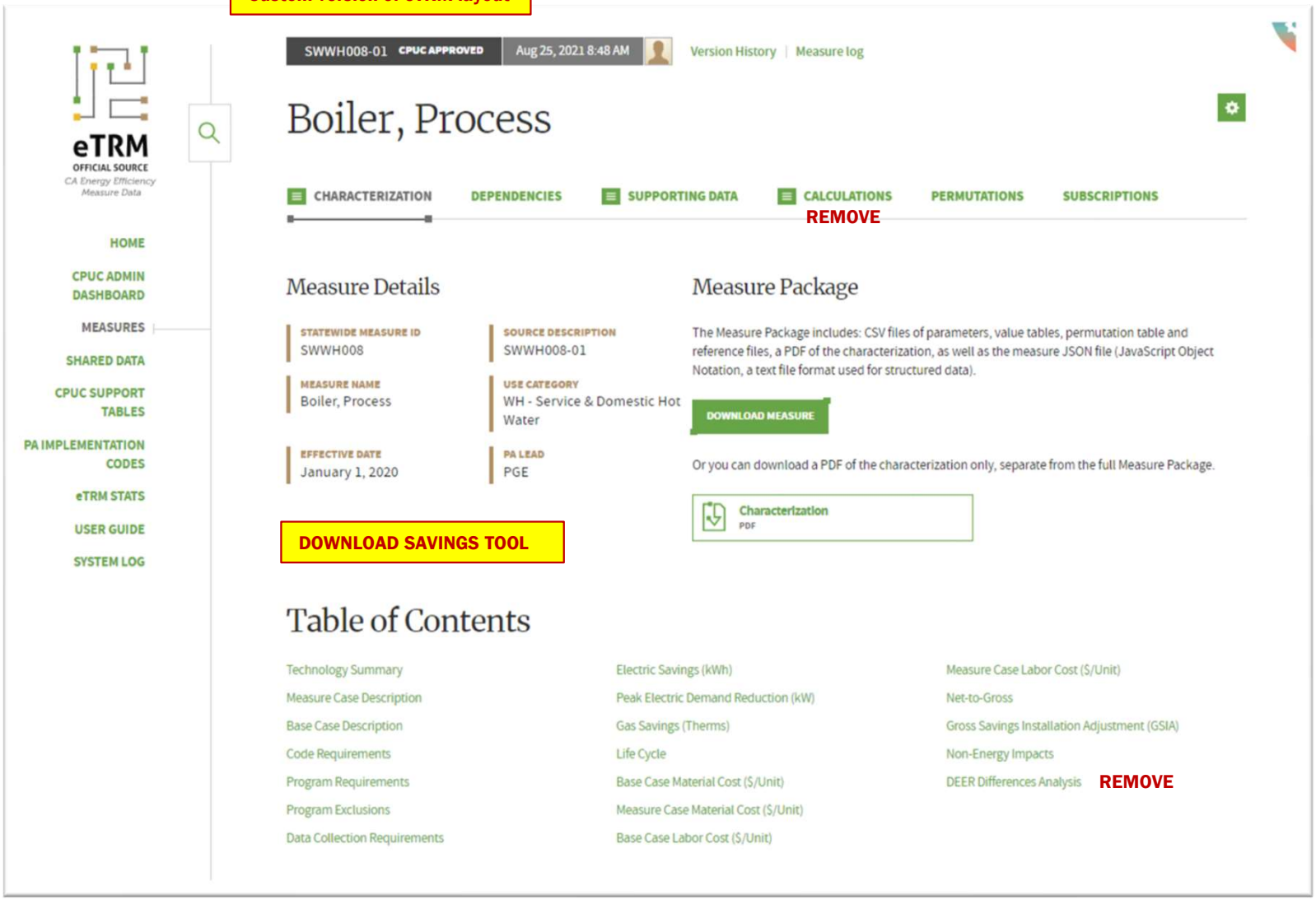


eTRM Enhancements for Custom

Custom version of eTRM layout



eTRM Enhancements for Custom

- Input/Questions
  - Today
  - Next Custom Subcommittee meeting (10/5, 1-3pm)
  - Email 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

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