

Technical Forum Meeting



JANUARY 26, 2023
LOS ANGELES, CA

Agenda

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Time (PST)	Agenda Item & Action	Discussion Leader
10:00 – 10:15	Introduction and Agenda Review	Annette Beitel
10:15 – 10:45 (30 min)	BP Metric 4A: Develop/Implement Measure Identification <ul style="list-style-type: none">• Status update on new measures• Proposed strategy for measure identification and rapid screening ACT: <ul style="list-style-type: none">• Feedback on proposed strategy	Ayad Al-Shaikh
10:45 – 12:00 (75 min)	Measure Reviews <ul style="list-style-type: none">• Direct Evaporative Cooler, Residential (LADWP/AESC)• Portable Air Conditioners and Heat Pumps, Residential (LADWP/TRC)• Solar Attic Fan, Residential (LADWP/TRC) ACT: <ul style="list-style-type: none">• Feedback on measures and CPUC policy	Ayad Al-Shaikh and Lake Casco
12:00 – 12:45	Lunch (lunch provided for in-person attendees)	n/a
12:45 – 1:00 (15 min)	Metric 8C, workplan procedure and template ACT: <ul style="list-style-type: none">• Affirmation of workplan procedure/template	Arlis Reynolds
1:00 – 1:30 (30 min)	Custom Update <ul style="list-style-type: none">• Q1 and Custom Subcommittee activities• eTRM “Phase 1” development	Arlis Reynolds

Agenda

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Time (PST)	Agenda Item & Action	Discussion Leader
1:30 – 2:30 (60 min)	eTRM / Existing measures <ul style="list-style-type: none">• 130+ measures updated• Demo: Using the eTRM data to see/understand the updated measures• BP Metric 3C: Stakeholder Communication Plan ACT: <ul style="list-style-type: none">• Input on Communication Plan strategies	Ayad Al-Shaikh and Tomas Torres-Garcia
2:30 – 2:45	Break	n/a
2:45 – 3:15 (30 min)	BP Metric 6D: Provide relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements ACT: <ul style="list-style-type: none">• Input for the activity workplan	Annette Beitel and Arlis Reynolds
3:15 – 3:45 (30 min)	Measure Property Data Whitepaper <ul style="list-style-type: none">• Subcommittee Update• Next steps	Ayad Al-Shaikh
3:45 – 4:00	Closing and Next Steps	Annette Beitel

2023 Schedule – TF Meetings

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Date	Location
January 26	LACI Building (525 S. Hewitt St., Los Angeles)
February 23*	PG&E HQ (300 Lakeside Drive, Oakland, CA)
March 23	Remote
April 27*	LACI Building (525 S. Hewitt St., Los Angeles)
May 25	Remote
June 22	SDG&E (315 Century Park Court, San Diego)
July 27*	BAY AREA TBD
No meeting in August	n/a
September 28	BAY AREA TBD
October 26*	SoCalGas ERC (9240 Firestone Blvd, Downey)
November 16	Remote
December 14	LA/OC TBD

* PAC meeting on the preceding Wednesday

Market Transformation Advisory Board

California Market Transformation Administrator (Cal MTA)

Recruiting Advisory Board Members for California Market Transformation

- California Market Transformation Administrator (CalMTA)
 - CPUC Decision (D.19-12-021)
 - Purpose: <https://calmta.org/mtab>
- 9-member Market Transformation Advisory Board (MTAB)
 - Ratepayer advocacy/protection
 - Workforce and/or labor
 - Environmental advocacy
 - Evaluation professional
 - National/Regional EE policy professional
 - Utility EE representative (to rotate among the IOUs, on the schedule and in the order on which they mutually agree)
 - CCA or REN energy efficiency professional
 - Up to two CPUC staff
- 2-year terms
- Kickoff in April or May
- Applications due by 5 p.m. PST **Friday, 1/27**
 - FAQ: <https://calmta.org/advisory-board-faq>
 - Application: bit.ly/CalMTA-MTAB

BP Metric 4A

Develop and Implement
Measure Identification
Strategy

- Status update on new measures
- Proposed enhancements for measure identification and rapid screening
- **See PPT: Metric 4A Cal TF New Measure Review Process**

- ACT:
 - Feedback on proposed enhancements

Measure Reviews

- **See New Measure PPTs**
 - Direct Evaporative Cooler, Residential (LADWP/AESC)
 - Portable Air Conditioners and Heat Pumps, Residential (LADWP/TRC)
 - Solar Attic Fan, Residential (LADWP/TRC)

- **ACT:**
 - Feedback on measures and CPUC policy

LUNCH

12:00 – 12:45

BP Metric 8C, Workplans

Develop workplans for projects or initiatives as required in the Business Plan

Establish a governance process to approve workplans prior to launching key activities

- Cal TF Workplan Procedure
 - Cal TF procedure document
 - Describes purpose, content, process, and affirmation and documentation requirements
- Cal TF Workplan Template
 - Template for developing workplans when required
- ACT:
 - Affirmation of workplan procedure and template

Cal TF Workplan Procedure

- Requirements
 - A workplan is required when indicated in the Business Plan.
 - Develop workplans using the Workplan Template.
 - Scale
- Affirmation
 - TF affirmation is required for all workplans.
 - PAC affirmation is required only for workplans for which the proposed scope deviates from the approved Business Plan or for which the proposed budget exceeds the Cal TF budget.
- Documentation
 - Document the date of TF (and PAC) affirmation in the workplan.
 - Post the affirmed workplan on the Cal TF website.

Cal TF Workplan Template

WORKPLAN



YYYY BP METRIC XX: SUBJECT

Draft for Cal TF review and affirmation

[Introduce the relevant or proposed business plan activity and proposed/required reviewers]

I. Problem Statement

[Briefly describe the problem or challenge; what is this activity intended to achieve, improve, or resolve? Include quantifiable baseline information where appropriate.]

II. Goals, Metrics, and Objectives

[Specify the goals, metrics, and objectives. Clarify the measures of success, including quantifiable metrics where appropriate.]

Stakeholder Benefits

[Describe how this activity and/or its outcomes will achieve the benefits described in the business plan; include any additional anticipated stakeholder benefits]

III. Scope

[Describe how Cal TF will operate to meet the goals, metrics, and objective (e.g., using an existing or new subcommittee, method(s) for stakeholder input/engagement; data collection and analysis, etc.)]

Deliverables

[list of key deliverables]

Potential Obstacles and Preliminary Solutions

[Describe potential challenges or obstacles (e.g., key stakeholder engagement/participation; required approvals) to completing the work and mitigation strategies/solutions]

WORKPLAN YYYY BP METRIC XX: SUBJECT

IV. Schedule

[Outline the schedule of major milestones and anticipated completion timeframe. For workplans that require a stage-gate process, list the key decision points and required decision makers. Describe any scheduling requirements related to other Business Plan activities or other relevant industry activities or events.]

V. Stakeholders and Team Members

[List the key stakeholders and team members engaged in this activity, and describe the level of effort expected from Cal TF membership]

VI. Budget

[Indicate whether activity budget is within the approved Cal TF budget. If additional funds are required, indicate the additional budget required to conduct the activity.]

VII. Affirmation

[Describe the affirmation requirements and, when affirmed, list the date of affirmation.]

BP Metric 6B, White Papers

- [White Paper Topic Summary](#)
- Top-ranked topics from previous survey
 - ISP Process for Custom Measures/Projects
 - GHG Calculation Approach and Data Sources with Recommendations for eTRM
 - Load Shape Development and Use
- Additional topics suggested
 - Hybrid/Semi-Deemed Measures
 - Custom Review Process
- ACT:
 - Propose additional White Paper topics to consider for discussion at the February TF meeting

Custom Update

Q1 and Custom
Subcommittee activities

Custom Subcommittee
meets monthly on 1st
Wednesdays, 1-3pm

- Develop and implement SW methods for at least three custom measures (5C)
 - eTRM “Phase 1” Development (5D/E)
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- Update list of potential measures that could be uploaded and managed in the eTRM (5A)
 - SW Custom Naming Convention (5A)
 - Proposal to improve approach to summarizing and providing clear CPUC guidance on custom projects (5A)
 - ISP White Paper

Develop Statewide Methods (5C)

- Custom Measures

- Boilers + Boiler AOE
 - ✦ Developing approach for steam boilers; plan to include AOE measures
- Chiller System Upgrade
 - ✦ Examining PG&E HVAC Tool, CPUC Chiller Tool, potential for hybrid options
- Pumps (Pump/VFD/Control Systems)
 - ✦ Examining DOE MEASR Tools, PG&E Pump Tool, and potential for hybrid options
- Retrocommissioning
 - ✦ Developing approach with PG&E HVAC Tool
- VFD on HVAC Fan
 - ✦ Exploring need and hybrid options
- Pump Overhaul
 - ✦ Paused based on CPUC Disposition
- Small HVAC
 - ✦ item moved to New Measure Review Process

Activities:

Consolidating guidance and methods for estimating impacts

Identifying areas that need clarification, simplification

Organizing information in the eTRM

Identifying needs and potential strategies for SW workbook management

Custom Measure List

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- **Update list of potential measures that could be uploaded and managed in the eTRM (5A)**
 - What existing custom measures would benefit from a more standard protocol (e.g., to make more consistent, efficient)?
 - What opportunities are we not seeing (e.g., due to cost to develop) that a standard/hybrid approach can facilitate?
- **Discuss:**
 - Approach and data sources to examine current portfolio activity to see type and frequency of new measures.
 - Methods to identify opportunities to add measures to portfolio.

SW Custom Naming Convention

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- **Develop statewide custom measure/offering IDs**
 - To improve consistency (e.g., same/similar projects are categorized the same way across PA tracking systems)
 - To facilitate statewide analysis of custom measure activity

- **Activity:**
 - Cal TF Staff reviewing existing custom measure lists, outreach to IOU/LADWP teams to understand approach/considerations
 - Custom Subcommittee will discuss/shape proposals

eTRM “Phase 1” Development

- Phase 1
 - Create **Custom Measures** in the eTRM to host information on calculation methods and tools for common custom measures
 - Create **Custom Library** in the eTRM to host calculation tools, templates, and other key statewide resources
 - (Does not include site-specific data or tracking)

- Next Steps
 - Custom Subcommittee provided input to shape “Phase 1” functional specifications
 - 1/23 – Presented wireframes to eTRM development team
 - 2/1 – Present/discuss wireframes to Custom Subcommittee
 - Implementation schedule TBD

Future eTRM Exploration

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- **Discuss future eTRM development within Custom Roadmap (5B)**
 - Hosting dispositions, ISP studies, other resources
 - Power query connections to link eTRM and external workbooks
 - Savings Calculations
 - Site-Specific Custom Measures
 - Custom Projects
 - Measure and Project Review Workflows

5A. Develop proposal to improve approach to summarizing and providing clear CPUC guidance on custom projects

- **Problem statement**
 - Current guidance approach is like “case law”
 - Project-specific dispositions may have an interpretation of guidance/decision that relevant to all stakeholders but not actively communicated to all stakeholders
 - Disposition database is a repository of information (dispositions, ISP, EOs) that may have important information but is not easy to find/identify
 - Dispositions are redacted, organized differently; newer formats of dispositions don't provide level of detail to make the guidance useful
 - Not clear what guidance/disposition information is current/outdated
 - First step of Res on ISPs is to identify existing ISP or disposition.
 - Stakeholders individually navigate/summarize/find information
 - Communications between CPUC and PAs with general guidance information (e.g., information transmitted in an email) may not be available to other stakeholders; stakeholders may not be aware. Ex. Memo on EU California
 - Many sources of guidance; difficult to keep track
 - Some guidance is left to engineering judgement; too much judgement involved – different reviewers may have different determinations
- **Goals/objectives**
 - Define an approach to make current regulatory guidance clear and accessible
 - Identify where there may be conflicts/inconsistency or outdated information in guidance documents; keep guidance documents clear and current
 - Implementers should have same access to guidance as project reviewers
 - Guidance information should be visible
- **Scope of the initiative**
- **Expected benefits to stakeholders**
- **Potential obstacles and preliminary solutions**
 - “Digest” of relevant disposition findings; use digest to clarify guidance going forward
 - Running list of guidance/interpretations from dispositions; provide a single source of information
 - See PG&E rulebook as a good example
 - Need ways to sort through / navigate disposition and guidance information
 - Opportunity for Ex post or Ex ante consultants to share input on the front end of project development – could reduce uncertainty in interpreting guidance (may be difficult for ex post to be involved) – consider opportunity to improve this process; to improve alignment between ex ante and ex post expectations
 - Look at what other jurisdictions do to better integrate ex ante and ex post (examples - TVA, PEPCO,
 - SBW 2019 ex post eval developed a worksheet of all the rules and guidance for 2019 evaluation year – something to consider as a concise, well organized guidance resource
- **Schedule considerations**
 - Explore how to break this down into phases – e.g., start with review of all existing guidance; in parallel, could consider which fields/tags to track and sort information.
- **Interested/required stakeholders**
 - Cal TF stakeholders
 - Custom program stakeholders (IOUs, LADWP, 3P implementers, project developers)
 - CPUC, Ex Ante and Ex Post reviewers

TF members brainstormed this item during December TF meeting; Custom Subcommittee will be working on this item

eTRM / Existing Measures

- **See PPT: Metric 3C Existing Measures, Communication Plan**
 - 130+ measures updated
 - Demo: Using the eTRM data to see/understand the updated measures
 - BP Metric 3C: Stakeholder Communication Plan
- **ACT:**
 - Input on Communication Plan strategies

BREAK
2:30 – 2:45

BP Metric 6D

- “Provide relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements”
- ACT
 - TF membership brainstorm on scope, format, and schedule to inform workplan

6D. Provide relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements

- Problem statement
- Goals/objectives
- Scope of the initiative
- Expected benefits to stakeholders
- Potential obstacles and preliminary solutions
- Schedule considerations
- Interested/required stakeholders

TF brainstorm
during the meeting

Measure Property Data

- **See PPT: Deemed Measure Property Data**
 - Subcommittee Update
 - Next steps

- **ACT:**
 - Email Ayad if interested in getting involved.

Closing & Next Steps

- Action Items
 - Share White Paper topic ideas
- Next TF Meeting
 - February 23, in-person in Oakland