Technical Forum Meeting

CALIFORNIA
TECHNICAL FORUM

FEBRUARY 23, 2023
OAKLAND, CA

Agenda

Time (PST)	Agenda Item & Action	Discussion Leader
10:00 – 10:15	Introduction and Agenda Review	Annette Beitel
10:15 – 11:15 (60 min)	**Metric 4A: Develop/Implement Measure Identification** • Expanded measure "pull" strategy • 4A Workplan **ACT:** • Affirm 4A Workplan	Spencer Sator
11:15 – 12:15 (60 min)	**Metric 1C: eTRM Enhancements Update** • Review & prioritization process • Enhancement groups and high-level goals **ACT:** • Stakeholder input on eTRM priorities	Tomas Torres-Garcia and Ayad Al-Shaikh
12:15 – 1:00	Lunch (lunch provided for in-person attendees)	n/a
1:00 – 1:45 (45 min)	**Workplans** • Metric 6D: Regulatory Updates to support Cal TF Membership • Metric 3C: Measure Package Communication Plan and Versioning Rules **ACT:** • Affirm 6D Workplan • Affirm 3C Workplan	Arlis Reynolds and Ayad Al-Shaikh

2/23/2023

Agenda

Time (PST)	Agenda Item & Action	Discussion Leader
1:45 – 2:30 (45 min)	**White Paper Updates** • White Paper topic list • ISP White Paper Update • Proposed topic: Streamlining Measures **ACT:** • Input on topics	Arlis Reynolds, Ayad Al-Shaikh, and Annette Beitel
2:30 – 2:45	Break	n/a
2:45 – 3:45 (60 min)	**Metric 8C: Cal TF 5-Year Roadmap – Update** **ACT:** • Input on Roadmap concepts	Annette Beitel
3:45 – 4:00	Closing and Next Steps	Annette Beitel
4:00+	Cal TF Happy Hour – location TBD	n/a

BP Metric 4A

Develop and Implement Measure Identification Strategy

- Last time: Proposed "rapid screening" approach and tool

- This time: Expanded measure "pull" strategy
  - Outreach/collaboration with cleantech community
  - TRM gap analysis
  - Metric 4A - New Measure Review Process

- 4A Workplan

- ACT:
  - Affirm 4A Workpaper

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4A Workplan

- See [4A Workplan](#) on the Cal TF website

- Tasks
  - ❑ 1. "Pull" Strategy to expand new measure intake
  - ❑ 2. Rapid Scoring Method

- Key Milestones
  - ❑ Present 4A workplan for TF affirmation – **February 2023**
  - ❑ Initiate Strategy 1 – **March 2023**
  - ❑ Present Rapid Scoring Methods to New Measure Screening Committee – **March 2023**
  - ❑ Project update to TF and PAC – **July 2023**

- TF Discussion
  - ❑ TF input on "pull" outreach approach
  - ❑ TF input on rapid scoring approach

BP Metric 1C

Complete eTRM enhancement prioritization by 2023 Q2

- See **1C eTRM Enhancements Update** slide deck

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LUNCH
12:15 – 1:00

BP Metric 6D

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

- Last time:
  - TF brainstorm on scope and approach

- This time: [6D Workplan](#)

- ACT:
  - Input on 6D Workpaper
  - Affirm 6D Workpaper

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6D Workplan

- See [6D Workplan](#) on the Cal TF website

- Tasks
  - ❑ 1. Define Regulatory Scope and Existing Communication Efforts
  - ❑ 2. Develop Cal TF Regulatory Update Recommendation
  - ❑ 3. Implement Cal TF Regulatory Update Process

- Key Milestones
  - ❑ Present 6D workplan for TF affirmation – **February 2023**
  - ❑ Define the regulatory scope and understand the ways that regulatory directives are communicated to various stakeholders, including gaps and needs – **April 2023**
  - ❑ Present proposed regulatory update solution to TF – **May 2023**
  - ❑ Solicit CPUC Staff input and buy-in on proposed implementation approach – **June 2023**

- TF Discussion
  - ❑ Measures of success? Quantifiable success metrics?
  - ❑ TF Champions

BP Metric 3C

Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates

- Previously:
  - TF Brainstorm on 3C challenges and potential solutions
  - Existing tools/methods to access data and information in the eTRM
  - TF Brainstorm on outreach strategies and topics for key stakeholder input

- This time: 3C Workplan

- ACT:
  - Affirm 3C Workpaper

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3C Workplan

- See [3C Workplan](#) on the Cal TF website

- Tasks
  - ❑ 1. Define Existing Resources
  - ❑ 2. Stakeholder Outreach
  - ❑ 3. Develop Versioning Protocol for MP Updates
  - ❑ 4. Develop Proposed Solutions

- Key Milestones
  - ❑ Summarize stakeholder needs and preferences – **May 2023**
  - ❑ Present/discuss proposed versioning protocol for MP updates – **May 2023**
  - ❑ Present/discuss proposed process and tool enhancements for stakeholder communication – **June 2023**

- TF Discussion
  - ❑ Quantifiable success metrics?
  - ❑ Forums to connect with stakeholders
  - ❑ TF Champions

BP Metric 6B

White Papers

- White Papers
  - TF Survey on White Paper topics
  - TF Brainstorm on top 3 topics
  - Continued solicitation of topic ideas
  - TF Affirmation: Industry Standard Practice (ISP) for Custom

- ISP Update

- Proposed new topic: Streamlining Measures

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White Paper Topics

Topic	Rank (Score)*
Industry Standard Practice (ISP) Process for Custom Measures/Projects	1 (2.4)
GHG Calculation Approach and Data Sources with Recommendations for eTRM	2 (2.0)
Load Shape Development and Use	3 (1.8)
Analysis Controller to Integrate Energy Plus Prototypes with the eTRM	4 (1.7)
Dual fuel gas and electric measures	5 (1.6)
Integrated Data Flow for Energy Efficiency	6 (1.5)
Measure lifecycle integration into eTRM (Potential and Goals, ETP, EM&V, and C&S)	7 (1.4)
Hybrid Measure (Semi-Deemed) Development	New
Custom Review Process	New
Streamlining Measures – Reducing Number of Permutation	New

* Rank based on **29** unique responses received through **1/18/2023**.

* Topic descriptions and stakeholder comments: **Cal TF White Paper Topic Descriptions and Comments** (PDF)

Measure Package Streamline

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TPP 5 – Reducing Measure Complexity

- ## Regulatory Context
  - ❑ Use "best available information"
  - ❑ Modeling appropriate for weather-sensitive measures
  - ❑ Balance accuracy with need to enable promising new technologies to enter IOU portfolios
  - ❑ Balance accuracy and precision, cost, and certainty

Recommended Process

- Calculation Approach
  - Impact: High / Normal / Low / Interim
  - Approval length varies – Short / Long
  - Approach: Equations / Modeled / Statistical / Evaluation / Other

- Parametric Analysis
  - Identify key inputs
  - Number of measure combinations

- Evaluate Information

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Recommended Process

- # Level of Statistical Rigor
  - ○ Evaluate confidence level and error suitable to impact

Table 2. Recommended Considerations for Statistical Rigor of Studies done Pursuant to Cal TF Recommendation

Approval Type	Low Impact Measure	Normal Impact Measure	Demonstrated High Impact Measure	Interim Measure
Short Term (Measure expires after 1 year, then "Long Term" review required)				• Statistical analysis for highest impact parameters in engineering calculation • 80% confidence level • Sampling and measurement error within suitable range
Long Term (Measure expires at discretion of Cal TF)	TF judgment	• Statistical analysis for highest impact parameters in engineering calculation • 80% confidence level • Sampling and measurement error within suitable range	• Statistical analysis for highest impact parameters in engineering calculation • 90% confidence level • Sampling and measurement error within 10%	

- # Number of measure combinations
  - ○ Differ >10%: Low / Normal / Interim
  - ○ Differ >1%: High
- # Administrative Considerations

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Data Use Cases

Planning / Program Management	Reporting
• Summarized to show the big picture	• Detailed to clarify acceptable claims
• Understand changes and impact	• Maintain data change protocols
• Reduced parameter set needed	• Maintain clear and robust connection between eTRM and CEDARS

BREAK
2:30 – 2:45

BP Metric 8A

Cal TF 5-year Roadmap

- Roadmap
  - Purpose
  - Form

- Background
  - Industry Trends
  - Organizational Wants/Needs
  - Regulatory Wants/Needs

- Key Goals/Initiatives

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5-year Roadmap

- BP Metric 8A. Develop 5-year Roadmap that identifies <u>core Cal TF/eTRM activities</u>, <u>new strategic initiatives</u>, and <u>desired success factors</u>. Roadmap will identify <u>coordination needs</u> and <u>leveraging opportunities</u> to achieve desired outcomes.

February 2023 - PAC Brainstorm

June 2023 - Draft Roadmap

September 2023 - Final Roadmap

April 2023 – PAC Discussions

Q3 2023 – Stakeholder Input

Closing & Next Steps

- Action Items
  - TBD

- Upcoming Meetings
  - 3/1 – Custom Subcommittee
  - 3/16 – Measure Screening Committee
  - TBD – eTRM Enhancement Charette
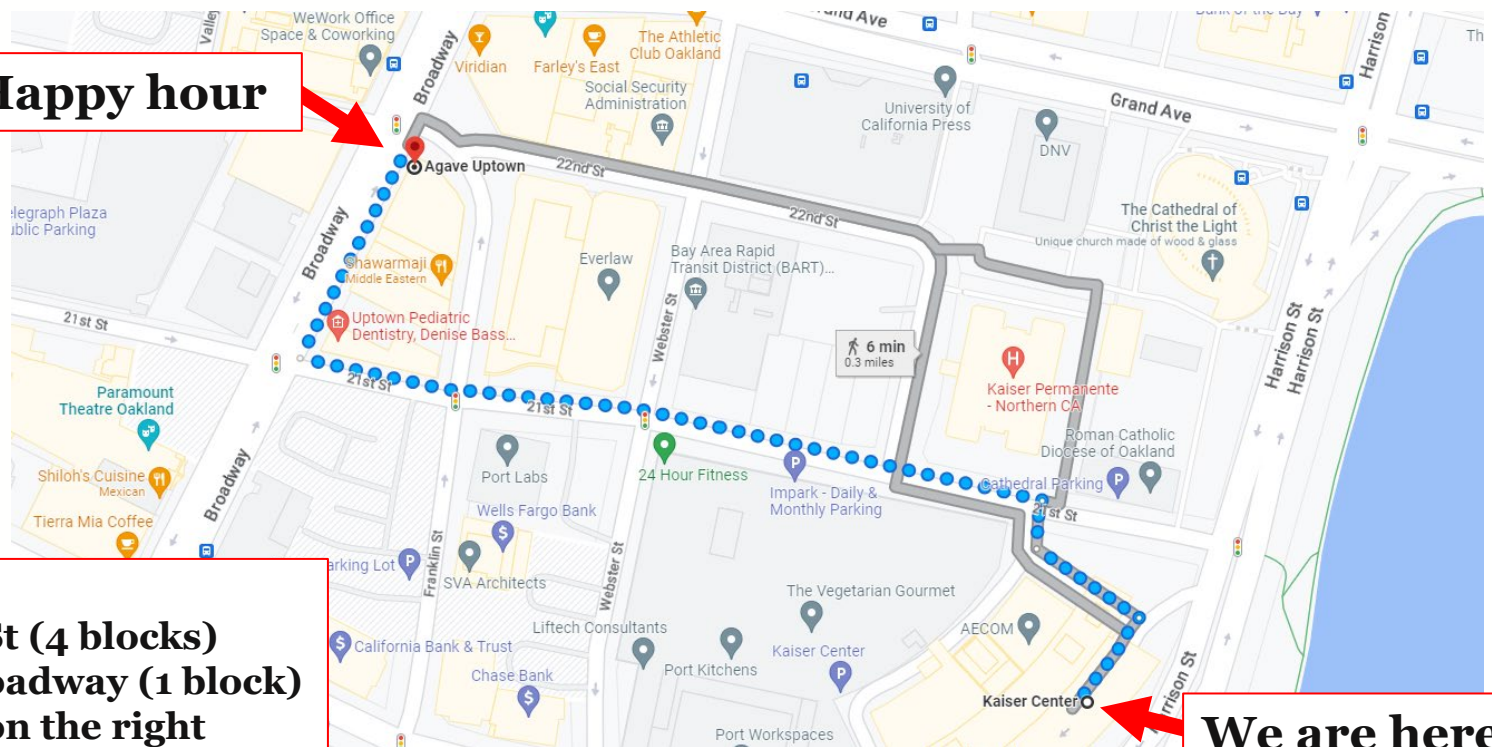
- Next TF Meeting
  - March 23, online

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Cal TF Happy Hour

- Agave Uptown, 2135 Franklin St, Oakland, CA
- 7-min (0.3 mile) walk

Happy hour

Directions:
Left on 21st St (4 blocks)
Right on Broadway (1 block)
Location is on the right

We are here