Cal TF 5-year Roadmap



MARCH 23, 2023 REMOTE MEETING

5-year Roadmap





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

February 2023 - PAC Brainstorm

June 2023 - Draft Roadmap September 2023 - Final Roadmap

April 2023 – PAC Discussions

Q3 2023 – Stakeholder Input



8A Cal TF 5-year Roadmap

Agenda



CALIFORNIA TECHNICAL FORUM

- Roadmap Goals [10]
 - Baseload Activities
 - Strategic Initiatives
- Roadmap Tactics [60]
 - Add/remove
 - Refine/clarify
 - Rating by importance/value
- Next Steps [5]
- Slido Polling Tool
 - Use cell phone or separate browser window



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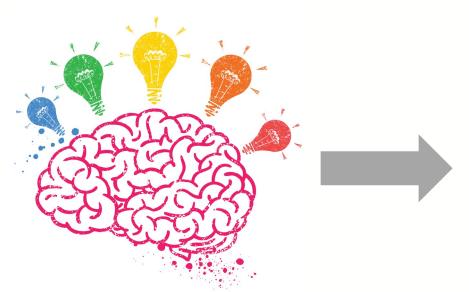


What is your favorite vacation destination?

Roadmap Development









TODAY: Organize, refine, prioritize

Goals and **Tactics**

LATER: Refine and sequence tactics on timeline

Success Factors (Draft)





- Reduce level of effort and cost
 - Measure package development and updates
 - Custom project development
 - Data management and reporting
 - Enable "small" measures/projects
- Centralized, organized, error-free data
- Broad use of eTRM by stakeholders
- Accelerated new measure development
- Increased participation, savings
- Predictable outcomes
- System encourages innovation
- Leveraging data and analytics support program strategies
- Amplify/accelerate capture of all ISDM opportunities

Roadmap Goals (Draft)





Baseload Activities

- eTRM Management and Development
- Measure Management
- Technical Policy Analysis & Recommendations
- Stakeholder Engagement

Strategic Initiatives

- Data Integration & Analytics
- Custom Initiative
- New Measure Development and Updates
- "All Source" eTRM
- eTRM Extension

Baseload Activities (Draft)





eTRM Management and Development

- Operational excellence, ongoing maintenance
- Enhancements
- Training (targeted stakeholder training)
- Ensuring cybersecurity

Measure Management

- Maintaining and updating SW measures to meet regulatory compliance and market changes
- Streamline MP development
- Notifications/Communication
- Improve quality (videos, example)
- Improve workflow / workload balancing
- Integrate evaluation / measure property data results
- Bundled measures

Technical Policy Analysis & Recommendations

- Develop analysis and stakeholder consensus on important technical policy issues facing California
- Improve SW consistency
- Standardize/streamline regulatory guidance, processes
- Centralized source of accurate, reliable policy information
- Facilitate policy clarifications when needed

Stakeholder Engagement

- Engage Cal TF, PAC members, regulatory agencies, experts, and other interested parties on development of common tools, technical analysis, and technical policy issues.
- Manage the Cal TF, PAC, and Subcommittees

Roadmap Goals (Draft)





Baseload Activities

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Strategic Initiatives (Draft)





Data Integration & Analytics

- Centralize, link, standardize EE data ("one stop shop" for data)
- Streamlined data flow to minimize manual data management and duplicative data
- Simplify and integrate reporting
- Integrate non-EE data (e.g., solar maps, EnviroScreen/DAC, census data, market data)
- Data analytics
 - Program activity overlap
 - Analytics for program planning
 - Locational activity, analysis, and value
 - Scenario Analysis
- Track measure journey (ET to Market Tx)
- Incorporate Portfolio and Goals data to track progress and identify gaps





Rate each Data Integration/Analytics Tactic based on level of importance and value.

(i) Start presenting to display the poll results on this slide.

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3/22/2023

Strategic Initiatives (Draft)



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Custom Initiative

- Streamline
- Centralize/organize regulatory guidance
- SW custom measures & tools
- Custom measures/tools in the eTRM
- Hybrid measures, deemification
- Develop/review custom projects in eTRM
- Perform custom project review/QA
- Third party arbiter when needed



Rate each Custom Initiative Tactic based on the level of importance and value.

Strategic Initiatives (Draft)



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New Measure Development and Updates

- Decarbonization/CO2/GHG measures (e.g., methane leaks)
- Expand and accelerate new measure identification
- Identify and engage with new entities and organizations to increase pool of new measures
- Streamline development and approval of new measures
- Accelerate measure uptake (training, visibility, videos)
- Streamline feedback to innovators (to support measure development)
- Lead new measure development and updating
- Submit new measures and measure updates directly to regulatory agencies



Rate Each New Measure Dev/Update Tactic based on the level of importance and value.

Strategic Initiatives (Draft)





"All Source" eTRM

- All behind-the-meter resources (e.g., DR, solar, battery, EV)
- Analytic tools and mobile platform to support trade allies and customers in optimize IDSM choices



Rate each "All Source" eTRM Tactics based on level of importance and value.

(i) Start presenting to display the poll results on this slide.

Goals: Strategic Initiatives (Draft)



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eTRM Extension

- Expand measure data (e.g., GHG, water savings)
- Representative measures for planning/forecasting
- Tools for different stakeholders and use cases:
 - trade allies, customers
 - ▼ POUs, CCAs, RENs
 - Local governments, colleges, entities with GHG goals
- Hourly and locational impacts
- Extend to NMEC measures
- Dynamic loadshapes
- Energy Plus integration
- Integrate cost effectiveness
- Regional licensing/leveraging
- Mobile app



Rate each eTRM Extension Tactic based on level of importance and value.

Revisit: Roadmap Goals (Draft)





Baseload Activities

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Strategic Initiatives

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Next Steps





- Refine and Sequence Tactics
- One-pager for each Roadmap Goal
 - Tactics
 - Timing, Sequence
 - Stakeholder value/benefits

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