

Cal TF 5-year Roadmap



CALIFORNIA
TECHNICAL FORUM

MARCH 23, 2023
REMOTE MEETING

5-year Roadmap

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- 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



- Roadmap Goals [10]
 - Baseload Activities
 - Strategic Initiatives
- Roadmap Tactics [60]
 - Add/remove
 - Refine/clarify
 - Rating by importance/value
- Next Steps [5]
- Slido Polling Tool
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Roadmap Development

6



TODAY:

Organize, refine, prioritize
Goals and **Tactics**

LATER:

Refine and sequence
tactics on timeline

Success Factors (Draft)

7

- 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)

8

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)

10

Baseload Activities

- eTRM Management and Development
- Measure Management
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- Stakeholder Engagement

Strategic Initiatives

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

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.**

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Strategic Initiatives (Draft)

13

- **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

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

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Strategic Initiatives (Draft)

15

- **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

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

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Strategic Initiatives (Draft)

17

- **“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

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

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Goals: Strategic Initiatives (Draft)

- **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
 - ✦ POU, 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

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

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Revisit: Roadmap Goals (Draft)

Baseload Activities

- eTRM Management and Development
- Measure Management
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- Stakeholder Engagement

Strategic Initiatives

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

Next Steps

22

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

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