

ISP White Paper



CALIFORNIA
TECHNICAL FORUM

SPENCER LIPP
MARCH 23, 2023

Background

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- Background
 - Highest scoring topic in TF White Paper Survey
 - See [WP ISP Brainstorm](#) from December TF meeting
 - TF affirmed White Paper topic in January
 - Subcommittee formed in Feb TF meeting
 - ✦ Any additional volunteers?

- Agenda
 - Refined objectives and approach
 - White paper schedule
 - Stakeholder input
 - ✦ ISP study template information
 - ✦ Search criteria
 - Potential future efforts

Objectives

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1. Streamline ISP Process

- a) Develop high-level, user-friendly “how-to” guide
- b) Streamline: Identifying whether ISP study is needed
- c) Streamline: Developing ISPs through information sharing
- d) Streamline: Communicating ISP updates/outcomes; keeping up-to-date central source; collect, organize, make accessible existing info**

2. Make ISPs accessible, transparent, informative, and up-to-date (including time range a study is valid; scope for which a study is valid)

- a) Organize & make accessible existing, relevant information**
- b) Develop/implement approach to quickly/efficiently incorporate ongoing/future info
- c) Facilitate sharing of ISP data

Objectives

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- 3. Proactively identify specific market segments, technologies/products and other ISP research needs**
 - a) Strategy to keep ISP information up to date

- 4. Support clarification ISP Guide where needed and coordination to SP development process (E-4939)**
 - a) Improve clarity & usability
 - b) Recommend removing redundant/unrelated material
 - c) Recommend updates to material
 - d) Obtain CPUC perspective on ISP Guide red-line

- 5. Identify/develop specific technical and technical policy recommendations**

Stakeholder Benefits

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- Reduce cost, time to develop ISPs
- Increase certainty and consistency in outcomes
- Increase access/transparency of ISP data/outcomes
- Improve Customer Experience
- Prevent duplication of effort (e.g., additional work if relevant SP determination already exists)
- Proactively identify and/or update ISPs when needed

- Potential metrics to quantify:
 - Fewer supplemental data requests
 - Faster review times; faster project development times
 - Increase rate of adoption of ISP baselines

Approach

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- **Data Collection - Completed ISP studies and SP Determinations**
 - **Critical Path Action** - Ex Ante Review project data from CMPA
 - Request from IOUs – project-specific SP from CMPA data
 - Request from IOUs - list of ISP studies they are aware of

Deliverable: Library of disposition data for analyzed systems/measures
- **Data Collection – Stakeholders - small group discussions/online survey**
 - Who: PAs, implementers/developers, CPUC reviewers
 - What: Data, Experience, Recommendations

Deliverable: Summarized survey results / interview findings
- **Develop template/guidance for ISP studies/outcomes**
 - What information should be clearly available (e.g., to clarify relevance)?
 - What information and level of detail should be provided in CPUC dispositions?
 - How can we make clear/consistent the bounds for each SP determination?
 - How should information be organized, characterized (e.g., to facilitate searching)?

Deliverable: Proposed template for future ISP studies; determinations

Approach

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- **Summarize/characterize existing ISP results/outcomes**

Deliverable: Roadmap to transparent SP information for existing, current SP

- **Summarize clarifications needed or helpful for stakeholders**

Potential deliverable: Proposed redlines to ISP Guidance Document to improve clarity

- **Estimate baseline metrics**

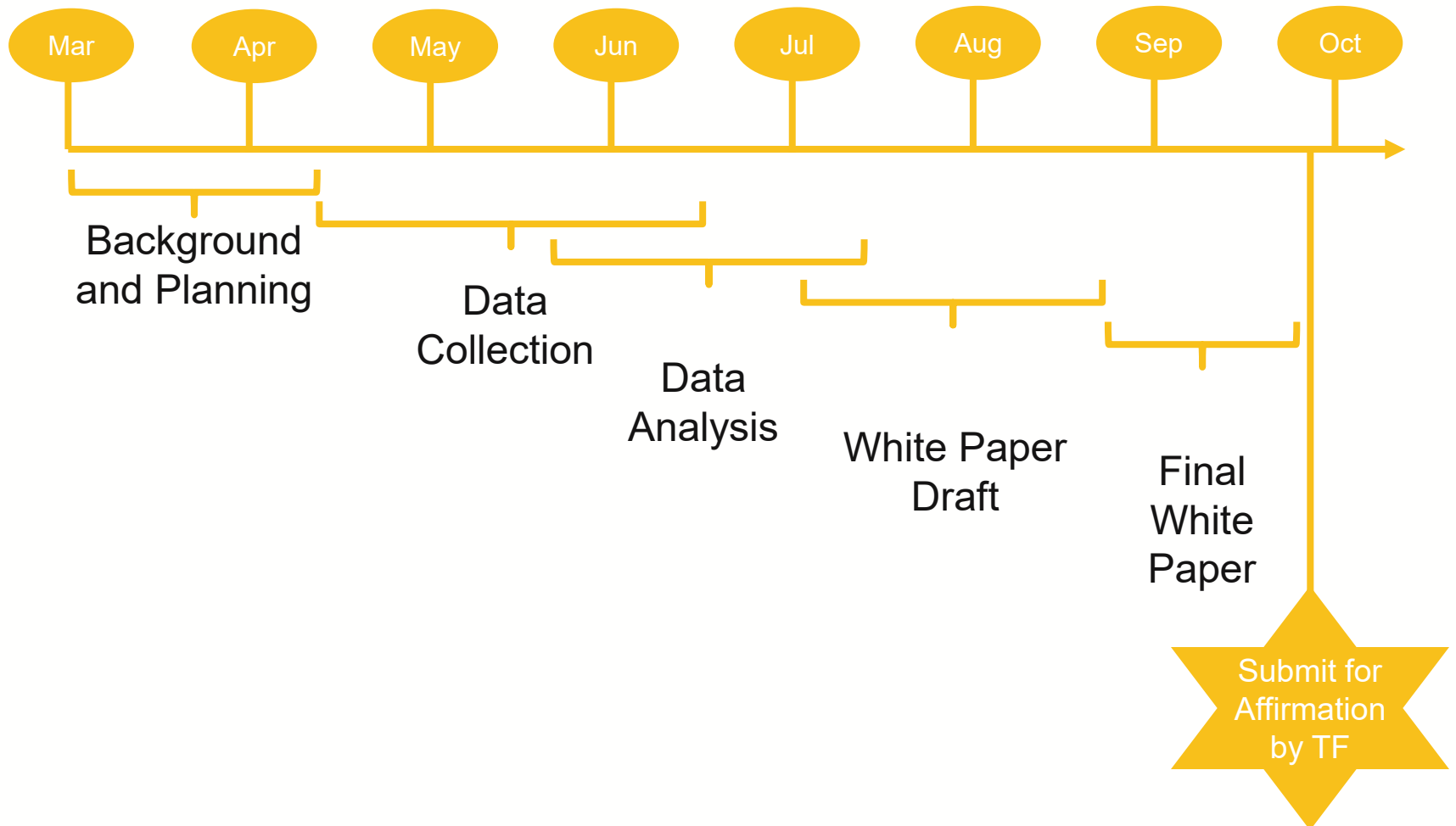
- **Develop recommendations**

- Streamline ISP development and communication (Objective 1)
- Improve access, transparency, clarity, searching, and sharing (Objective 2)
- Keep ISP information up to date (Objective 2, 3)
- Understand current activity and identify needed ISP research (Objective 3)
- Support clarification of ISP Requirements (where needed) (Objective 4)
- Cal TF recommendations – e.g., specific dispositions, markets, or approach (Objective 5)

Deliverable: White Paper with recommendations

Schedule

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Discussion: ISP Determinations

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- Information in Market-Based ISP Determinations
 - Specific determination with identifiable metric (e.g., efficacy for lighting, kW/ton for chillers, etc)
 - Clear range of application of ISP determination (e.g., lighting type, chiller type/tonnage)
 - Timeline or duration of ISP determination (e.g., 3 years, next T-24 code cycle)
- Are these the right ones? What are we missing?
- Do these change for an informal ISP?

Discussion: Search Functionality

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- Assuming a database of SP determinations existed, would a search function be useful?
- If so, what searchable criteria would be more beneficial? Initial ideas:
 - Technology type
 - SW solution code
 - Key word
 - Expiry date

Potential Phase II Efforts

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- Full library of dispositions
 - Potentially hundreds of CPUC SP determinations in EAR
 - Align with SW custom solution code consolidation
- ISP Guide Version 3.0
 - Version 2.0 last updated in 2019

Objectives

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1. Streamline ISP Process

- a) Develop high-level, user-friendly “how-to” guide (e.g., to determine whether ISP is needed; already available; define requirements based on market drivers)
- b) Streamline: Identifying whether ISP study is needed
- c) Streamline: Developing ISPs (when needed) (e.g., support to find vendors & data sources for new studies; survey development)
- d) **Streamline: Communicating ISP updates/outcomes; keeping up-to-date central source; collect, organize, make accessible existing info**

2. Make ISPs accessible, transparent, informative, and up-to-date (including time range a study is valid; scope for which a study is valid)

- a) **Organize & make accessible existing, relevant information** (need a plan for historical info; need to understand how many existing (and still relevant) SPs there are today)
- b) Develop/implement approach to quickly/efficiently incorporate ongoing/future info
- c) Facilitate sharing of ISP data

Objectives

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- 3. Proactively identify specific market segments, technologies/products and other ISP research needs (already required, but no existing process; who, how funded, etc.)**
 - a) Strategy to keep ISP information up to date

- 4. Support clarification ISP Guide where needed and coordination to SP development process (E-4939)**
 - a) Improve clarity & usability (needs a clean, easy-to-understand, well-organized technical rewrite at minimum to clarify language)
 - b) Recommend removing redundant/unrelated material
 - c) Recommend updates to material
 - d) Talk to CPUC about proposed red-line for clarity; actual redlining maybe a Phase 2 (after completing the White Paper; distinct activity from White Paper)

- 5. Identify/develop specific technical and technical policy recommendations**

Approach

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- **Data Collection - Completed ISP studies and SP Determinations**

- **Critical Path Action** - CPUC ex ante review project data from CMPA with MAT, tech type, measure description, etc.
- Request from IOUs - project specific SP from CMPA to identify trends and/or gaps/needs for additional research
- Request from IOUs - list of ISP studies they are aware of; ~dozen market-level ISPs

Deliverable: Library of disposition data for analyzed systems/measures (Complete library - Phase 2?)

- **Data Collection – Stakeholders - small group discussions/online survey**

- Who: PAs, implementers/developers, CPUC reviewers
- What: Data, Experience, Recommendations

Deliverable: Survey/interview template with questions for stakeholders

Deliverable: Summarized survey results / interview findings

- **Develop template/guidance for ISP studies/outcomes**

- What information should be clearly available (e.g., to clarify relevance)?
- What information and level of detail should be provided in CPUC dispositions?
- How can we make clear/consistent the bounds for each SP determination?
- How should information be organized, characterized (e.g., to facilitate searching)?

Deliverable: Proposed template for future ISP studies; determinations

Approach

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- **Summarize/characterize existing ISP results/outcomes and data for existing resources and challenges**

Deliverable: Roadmap to transparent SP information for existing, current SP information

- **Summarize clarifications needed or helpful for stakeholders (avoid confusion and/or inconsistencies)**

Potential deliverable: Draft redline to ISP Guidance Document

- **Estimate baseline metrics (e.g., cost/time to develop/review ISPs)**
- **Develop recommendations**
 - Streamline ISP process (Objective 1)
 - ✦ Development (Objectives 1A, 1B), Communication (Objectives 1A, 1C)
 - Improve access, transparency, clarity, searching, and sharing (Objective 2)
 - ✦ Existing and future ISP data, studies, dispositions
 - Keep ISP information up to date (Objective 2, 3)
 - Identify future ISP research needs (Objective 3)
 - ✦ describe the current state and recommendations related to proactive SW coordination
 - ✦ Analyze CEDARS data to look at custom activity / potential needs
 - Support clarification of ISP Requirements (where needed) (Objective 4)
 - Cal TF recommendations – e.g., specific dispositions, markets, or approach (Objective 5)

Deliverable: White Paper with recommendations

Data Request to CPUC

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- Cal TF is working on an effort to compile and organize existing standard practice determinations to support stakeholders in awareness of existing SP determinations (first step of the ISP process for custom project).
- This effort will help streamline the ISP development process, reducing the time and cost for stakeholders (project developers and reviewers) to identify existing relevant SP determinations and avoiding potential redundant and unnecessary ISP research.
- We are asking for information on the population custom projects to help us with targeted data collection on existing SP research and determinations. (We are interested in CPR-approved projects.)
- What:
 - Bimonthly upload data showing custom projects for the following time period: 1/1/2018 (when SBW started) (earlier if possible) to most recent upload
 - Include the following fields
 - ✦ [see Chas' list]
 - ✦ Ask to include CPR disposition status
- Arlis to send data request