Technical Forum Meeting

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TECHNICAL FORUM

MARCH 23, 2023
REMOTE

Morning Agenda

Time (PST)	Agenda Item & Action	Discussion Leader
10:00 – 10:30 (30 min)	**Agenda Review and Quick Updates** • eTRM Release Updates • eTRM Enhancement Charette • Metric 6D Regulatory Updates	Ayad Al-Shaikh
10:30 – 11:00 (30 min)	**ISP White Paper** • Refined objectives, scope, approach, schedule • ISP study templates and search criteria • Potential future efforts **ACT:** • Stakeholder input on priority needs/value	Spencer Lipp, TF Member
11:00 – 12:00 (60 min)	**Metric 5X Custom Initiative – Workplan** • Draft 5X Workplan • 5X Activities Update • Custom eTRM Module **ACT:** • Discuss, input on draft 5X Workplan	Arlis Reynolds
12:00 – 1:30	**Lunch**	n/a

Afternoon Agenda

Time (PST)	Agenda Item & Action	Discussion Leader
1:30 – 2:00 (30 min)	**Total System Benefit (TSB) Overview** • Why Total System Benefit • High-level explanation of TSB • Stakeholder Q&A	Rob Bohn, PG&E
2:00 – 2:30 (30 min)	**Metric 4A New Measure Scorecard Update** **ACT:** • Input on revised scorecard metrics and priorities	Spencer Sator
2:30 – 2:45	Break	n/a
2:45 – 4:00 (75 min)	**Metric 8C Cal TF 5-Year Roadmap – Update** **ACT:** • Input on Roadmap scope, sequence, schedule	Annette Beitel

Quick Updates

- eTRM Release Updates
  - v2.5.0 Released on 3/7/2023 (Security and Measure Property Data functionality)
  - v2.5.1 Release planned for week of March 27th (CET spec alignment)

- eTRM Enhancement Charette
  - Charette held 3/22/2023
  - Results will be posted on the Cal TF website:
  - [eTRM Version 2 Development — Cal TF](#)

- Metric 6D Regulatory Updates
  - SW Deemed Rulebook in progress (CPUC)
  - Interest in a "living" Rulebook

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ISP White Paper

- [ISP White Paper Update](#)

- Refined objectives, scope, approach, schedule

- ISP study templates and search criteria

- Potential future efforts

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BP Metric 5X

Custom Initiative (includes all metrics in BP Goal 5)

- Draft Workplan

- Activities Update

- Custom eTRM Module

- ACT:
  - Discussion and input
  - Review draft workplan and send comments by **Monday, April 10**

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5X Workplan

- "Custom Initiative"

- Draft Workplan will be posted on Cal TF website by Friday

- Custom Subcommittee discussion on April 5

- Send comments by April 10

- Revised 5X Workplan for affirmation at April 27 TF meeting

- Stakeholder Challenges
  - ❑ Access, understanding, and staying current policy/guidance
  - ❑ Uncertainty and perceived inconsistencies in requirements
  - ❑ Long time periods and high costs to complete a project
  - ❑ Lost opportunities due to high cost of developing projects
  - ❑ Different systems, tools, and processes across PAs

- Stakeholder Benefits
  - ❑ Transparency
  - ❑ Statewide consistency and standardization
  - ❑ Time savings
  - ❑ Cost savings
  - ❑ Stakeholder engagement
  - ❑ Increased participation and savings

5X: Scope

- 5A. Gather, Organize, and Prioritize existing custom guidelines, tools, and resources being used by POUs, IOUs, and Implementers

- 5B. Finalize High-Level Custom Roadmap by 2023 Q2

- 5C. Develop and Implement SW Methods for at least three Custom Measures

- 5D. Update eTRM Documentation

- 5E. Implement select POU and statewide TRM tools/calculators in the eTRM

- ISP White Paper

5A-1: Custom Regulatory Summary Review

- **Objective**
  - Summarize the sources and scope of existing custom regulatory guidance
  - Develop recommendations to improve access and clarity for all stakeholders

- **Approach**
  - Gather and summarize existing resources
    - *Need support from CPUC, IOUs to identify/access*
  - Characterize resources (e.g., accessibility, update status, update frequency, clarity, and usefulness)
  - Identify potential overlap, conflicts
  - Develop, prioritize recommendations

- **Deliverables**
  - Summary of custom regulatory resources, policy, and guidance resources
  - Proposal to improve approach to summarizing and providing clear guidance on custom projects

5A-2: Statewide Custom Measure ID

- **Objective**
  - Establish a Statewide Measure ID structure for custom measures

- **Approach**
  - Review existing PA-specific measure codes
  - Model deemed measure code structure
  - Map existing PAC codes to proposed new code structure

- **Deliverables**
  - Proposed SW Custom Measure ID Convention for Custom Measures
  - Table to map existing PA-specific measure codes to proposed SW Measure ID

5A: Gather/Organize/Prioritize

## 5A-3: List of Measures for Statewide Methods

- **Objective**
  - Identify and prioritize custom measures for statewide standardization

- **Approach**
  - Identify common custom measures
    - Custom program activity and claims data
    - Existing methods guidance documents
    - Stakeholder input on potential new custom measures
  - Identify "hybrid" opportunities
  - Prioritize measures for statewide development

- **Deliverables**
  - List of custom measures recommended for SW standard and/or hybrid methods

5A-4: List of Custom Tools

- **Objective**
  - Identify and characterize custom tools that stakeholders may use to develop custom projects

- **Approach**
  - Identify and gather existing tools
    - *Need support from CPUC, IOUs, implementers to identify/access*
  - Characterize tools (e.g., use, status)
  - Identify and prioritize needs to improve the library of useful tools

- **Deliverables**
  - List of characterized custom tools used in past five years.
  - Public library of custom tools with summary information
  - Prioritized list of needs to update, seek approval, and/or develop new custom tools.
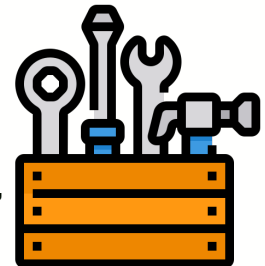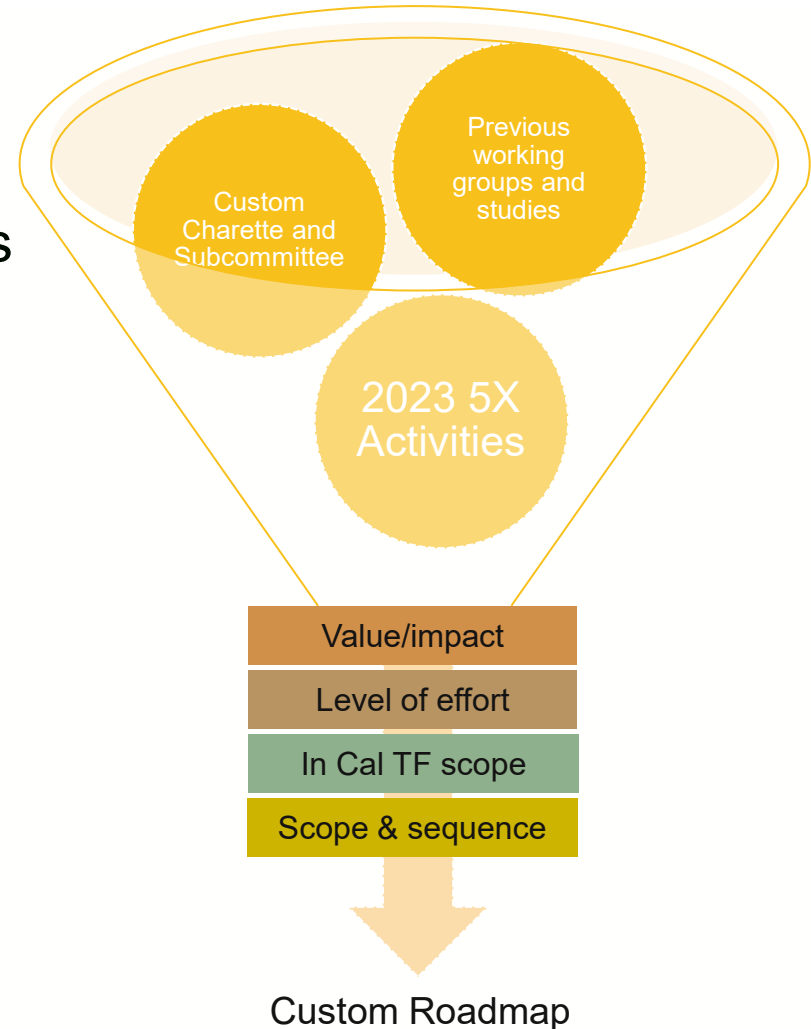
- **Objectives**
  - ❑ High-level scope, priorities, and schedule for future Cal TF activities
  - ❑ Framework for Custom Initiative tactics in the annual Business Plan

- **Deliverables**
  - ❑ Summary of characterized custom improvement goals and activities
  - ❑ Draft and Final Custom Roadmap
    - ✖ Requires PAC approval

Custom Charette and Subcommittee

Previous working groups and studies

2023 5X Activities

Value/impact

Level of effort

In Cal TF scope

Scope & sequence

Custom Roadmap

5C: Develop/Implement SW Methods

5C-1: Statewide Custom Measures (3)

- **Objective**
  - SW Custom Measures
    - Definitions
    - Eligibility
    - Savings methods
    - Data collection requirements
    - M&V requirements
    - Calculation Tools/Resources

  Custom Measure Characterization

- **Approach**
  - Custom Measure Subgroups
  - Solicit CPUC input
  - Custom Subcommittee approval
  - Cal TF affirmation
  - Solicit CPUC approval

- **Deliverables**
  - Custom Measure Packages, presented to Custom Subcommittee for affirmation

5C-2: Custom MP Develop/Update Workflow

- **Objective**
  - Formal workflow and process for developing, reviewing, and updating SW Custom Measures and Tools

- **Approach**
  - Adapt deemed MP workflows to custom
  - Seek CPUC buy-in to provide input and review proposed SW custom measures and tools
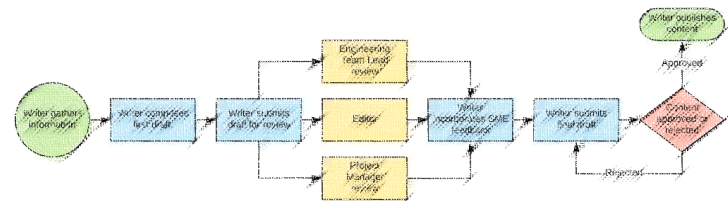
- **Deliverables**
  - Custom Measure Package Development and Update Workflow, presented to TF for affirmation
  - Assessment of potential to implement approved workflow in eTRM

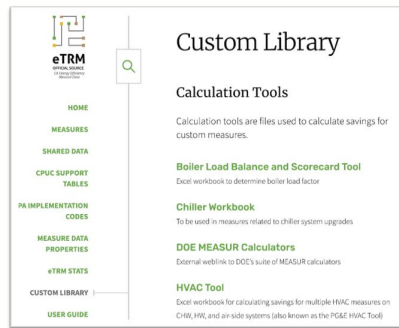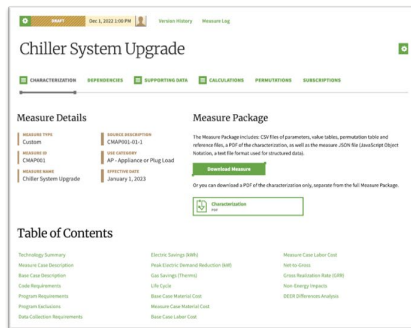# 5D: Update eTRM Documentation

- Objectives:
  - ❑ eTRM documentation as needed to support custom measures and resources in the eTRM

- Deliverables:
  - ❑ eTRM Custom Measure Characterization Template
  - ❑ TBD based on 2023 Enhancements

5E-1: eTRM Custom Phase 1

5E-2: Additional eTRM Custom Modules

5E-1: eTRM Custom Phase 1

- **Objective**
  - Custom Measures
  - Custom Library

- **Deliverables**
  - Functional specifications and wireframes
  - Implement eTRM Custom Phase 1 (TBD)

5E-2: Additional eTRM Custom Modules

- **Objective: Leverage the eTRM for Custom**
  - Data intake
  - Calculations
  - POU tools
  - Develop custom projects
  - Project review workflows

- **Deliverables**
  - Custom module concepts
  - Custom eTRM Visioning Charette
  - Business requirements and functional specifications for select modules (TBD)

5X: Goals/Objectives

Task	Goals, Metrics, and Objectives
5A	• Improve **stakeholder awareness, access, and understanding** of custom regulatory guidance and policy • Improve ability for new stakeholders to understand custom policies and processes • Establish a **statewide Measure ID structure** for custom measures • Identify and prioritize custom measures that are good candidates for **standard methods and tools** and/or hybrid methods • Identify and make accessible **tools to support custom measure development** • Prioritize identified custom improvement recommendations
5B	• Achieve stakeholder consensus on a multi-year scope and schedule for Cal TF activities (beyond this workplan) to support the custom portfolio
5C	• **Develop statewide standard methods and tools** that clarify requirements, improve consistency, and reduce time and costs for measure development • Establish a formal process for development, review, and approval of statewide custom methods and tools
5D	• Develop user-friendly eTRM documentation to support any eTRM development for Custom
5E	• Develop functional specifications to **host custom measures and resources in the eTRM** • Develop a stakeholder-supported vision for how the eTRM can support the custom portfolio • Define eTRM Custom Modules to support the eTRM Custom vision

2/23/2023

5X: Key Milestones

- **5A. Gather, Organize, and Prioritize existing custom guidelines, tools, and resources**
  - ❑ Summary of Custom Regulatory Guidance Resources – **April 2023**
  - ❑ Draft Custom Measure ID Structure and Mapping for Stakeholder Review – **May 2023**
  - ❑ Affirmation of Custom Measure ID Structure – **TBD**

- **5B. Finalize High-Level Custom Roadmap by 2023 Q2**
  - ❑ Draft Custom Roadmap – **July 2023**
  - ❑ Final Custom Roadmap, Affirmation – **October 2023**

- **5C. Develop and Implement SW Methods for at least three Custom Measures**
  - ❑ Custom Measure Characterizations for Stakeholder Review – **June 2023**
  - ❑ Proposed Custom Measure Development, Review, and Approval Process – **July 2023**
  - ❑ Affirmed Custom Measure Characterizations – **TBD**

- **5D. Update eTRM Documentation**
  - ❑ TBD

- **5E. Implement select POU and statewide TRM tools/calculators in the eTRM**
  - ❑ Final Custom eTRM Phase 1 Functional Specifications – **March 2023**
  - ❑ Implementation of eTRM Phase 1 – **TBD**
  - ❑ eTRM Custom Visioning Charette – **July 2023**
  - ❑ Draft Vision for Custom eTRM Modules – **September 2023**

- **ISP White Paper**
  - ❑ Draft White Paper – **July 2023**
  - ❑ Final White Paper, Affirmation – **September 2023**

Stakeholder Engagement

- Custom Subcommittee
  - ❑ Monthly meetings
  - ❑ Subgroups
  - ❑ Website & SharePoint

- TF and PAC meetings
  - ❑ Updates, input, affirmations (when needed)

- CPUC Review Team
  - ❑ Regular check-in
  - ❑ Solicit input and review at key milestones

- SW Custom Coordination Meeting
  - ❑ Cal TF Updates

- Ad hoc meetings and requests
  - ❑ Data requests
  - ❑ Input requests (stakeholder survey, document review)

Data Requests

- Anticipated data requests include:
  - ❑ Non-public regulatory guidance resources (e.g., CMPA, IOU sources, and provided through project-specific communications)
  - ❑ Custom project activity data (i.e., aggregated biweekly upload data) for custom measures installed and in-progress
  - ❑ Custom Tool Archive (CTA) and other tools used to develop custom measures
  - ❑ Data and documentation from the CAEnergyGuidance.com resource
  - ❑ Selected project- or measure-specific standard practice research and determinations

eTRM Custom Phase 1

- Creates **Custom Measures** in the eTRM to host information on <u>calculation methods</u> and <u>calculation tools</u> for common custom measures

- Creates **Custom Library** in the eTRM to host calculation tools, templates, and other key statewide resources

- Does **<u>not</u>** include site-specific data or measure/project tracking

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Custom Library

Custom Measures

CMAP001-01 | **Dec 1, 2022 1:00 PM** | **Version History**

Chiller System Upgrade

☰ CHARACTERIZATION   DEPENDENCIES   ☰ SUPPORTING DATA   ☰ CALCULATIONS   PERMUTATIONS   SUBSCRIPTIONS

Measure Details

MEASURE TYPE
Custom

MEASURE ID
CMAP001

MEASURE NAME
Chiller System Upgrade

SOURCE DESCRIPTION
CMAP001-01-1

USE CATEGORY
AP - Appliance or Plug Load

EFFECTIVE DATE
January 1, 2023

Measure Package

The Measure Package includes: CSV files of parameters, value tables, permutation table and reference files, a PDF of the characterization, as well as the measure JSON file (JavaScript Object Notation, a text file format used for structured data).

Download Measure

Or you can download a PDF of the characterization only, separate from the full Measure Package.

Characterization
PDF

Table of Contents

Technology Summary

Measure Case Description

Base Case Description

Code Requirements

Program Requirements

Program Exclusions

Data Collection Requirements

Electric Savings (kWh)

Peak Electric Demand Reduction (kW)

Gas Savings (Therms)

Life Cycle

Base Case Material Cost

Measure Case Material Cost

Base Case Labor Cost

Measure Case Labor Cost

Net-to-Gross

Gross Realization Rate (GRR)

Non-Energy Impacts

DEER Differences Analysis

LUNCH
12:00 – 1:30

Total System Benefit (TSB) Overview

- [TSB Overview by PG&E](#)
- Why Total System Benefit
- High-level explanation of TSB
- Stakeholder Q&A

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Metric 4A New Measure Scorecard Update

- [Metric 4A New Measure Scorecard Update](#)

- Revised scorecard

- Proposed priorities for new measure intake 2023

- Proposed top 20 initial entities to target

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BREAK
2:30 – 2:45

**8A Cal TF
5-year Roadmap**

- [Metric 8A Cal TF Roadmap Update](#)
- Roadmap Goals
- Roadmap Tactics

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Closing & Next Steps

- Action Items
  - Review draft Custom Workplan
    - Send comments to arlis.reynolds@futee.biz
  - TBD

- Upcoming Meetings
  - 4/5 – Custom Subcommittee
  - TBD – Measure Property Data Subcommittee

- Next TF Meeting
  - April 27, LACI Building, Los Angeles

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