

Technical Forum Meeting



CALIFORNIA
TECHNICAL FORUM

DECEMBER 15, 2022

Agenda

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- Overview & Introductions (10:00-10:30) – Ayad
 - 2022 Recap and Highlights
- 2023 Business Plan Overview (10:30-11:00) – Arlis
 - 2023 Schedule
- Brainstorm for Goal 8: 5-year Roadmap (11:00-12:00) – Ayad / Arlis
- **Lunch (12:00-1:00)**
- Brainstorm for Goal 5: Custom Roadmap (1:00-2:30) – Arlis
- Brainstorm for Goal 6: White Papers Topics (2:30-4:00) – Ayad
 - Small Group work (2:30-3:30)
 - Group summaries (3:30-4:00)
- Recap and Closing (4:00-4:30) – Ayad
- Happy Hour (4:30+)

2022 Highlights

- Back to in-person meetings!
- **13** New Cal TF Members
- **4** new Cal TF Staff members
- eTRM Release and Documentation
- **134** Measure Packages Review
- eTRM at **2,600+** users
- **23** New Measures Proposed
- Launched Custom Subcommittee

Welcome New TF Members

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Adan Rosillo
PG&E



**Anders "Andy"
Danryd**
SCG



**Andres
Fergadiotti**
SCE



**Arash
Kialashaki**
PG&E



Briana Rogers
AESC



David Chan
Enovity/Veolia



Denis Livchak
Synergy Energy



Jay Bhakta
SCE



King Lee
CLEAResult



**Kristin
Heinemeier**
Frontier Energy



Lake Casco
TRC



Myrna Dayan
Cascade



Roger Baker
*Independent
Consultant*

New members are on the TF Member Webpage: <http://www.caltf.org/tf-members>

New Cal TF Staff Members

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Arlis Reynolds
Costa Mesa, CA

15+ years of experience
in EE and EM&V

Led EE impact and
process EM&V and pilot
tech/program analysis

**Leading custom /
hybrid measure
activities**



Daniel May
Chicago, IL

33+ years of experience
in software
development/mgmt

Designed, matured, sold
two software companies

**Supporting next phase
of eTRM software
development**



Randy Kwok
San Jose, CA

30+ years of experience
in EE

Former TF Member

16 years with PG&E EE
team (custom, deemed,
low income)

**Supporting Measure
Property Data effort**



Spencer Sator
Boulder, CO

15+ years of
experience in energy

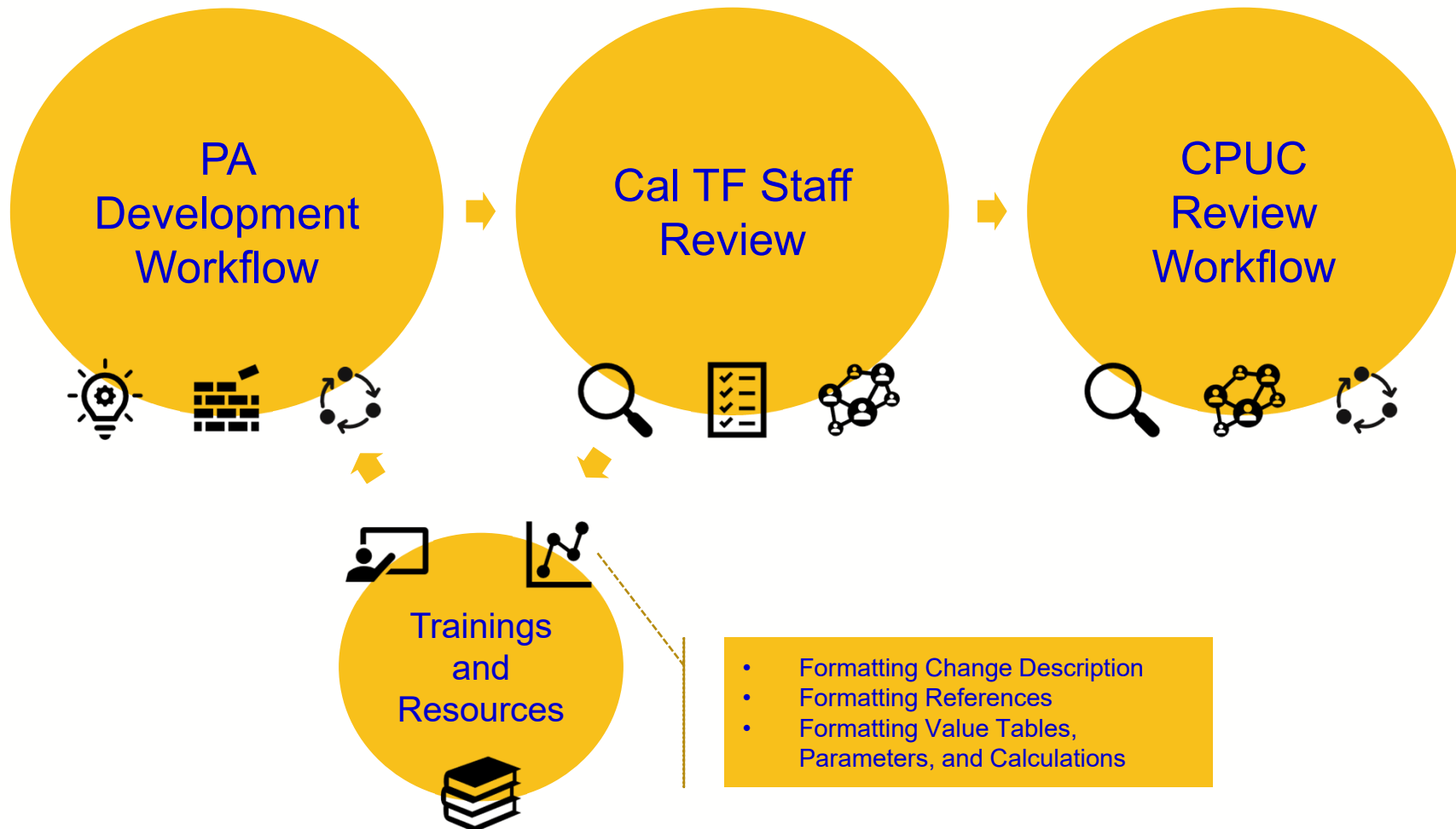
Former Director of
Emerging Technology
at E Source

**Supporting New
Measure Review
process**

Cal TF Staff Review Summary

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- 138 Measure Packages Reviewed



eTRM Release and Documentation

eTRM in 2022

- Workflow (Measure Log and Reports)
- Permutations (Data type, rounding, new water fields)
- APIs
- Inclusion of CCAs/RENs in eTRM

• eTRM Documentation/Resources

Measure Development & Review Guidelines

Measure Development & QA/QC Guidelines (Data Dictionary) ★

Workflow Conventions "Cheat Sheet" ★

Workflow Guidelines ★

Style Guide

Guidelines to Estimate Measure Costs & Savings

Measure Development Templates

Measure Characterization Template ★

Measure Proposal Form

eTRM User Resources

eTRM User Guide for Base Users and Measure Contributors ★

eTRM API Specification (forthcoming)

Measure Contributor Training Resources (videos/slide decks) ★

Available on Cal TF website:
<http://www.caltf.org/tools> &
<http://www.caltf.org/submit-a-measure>

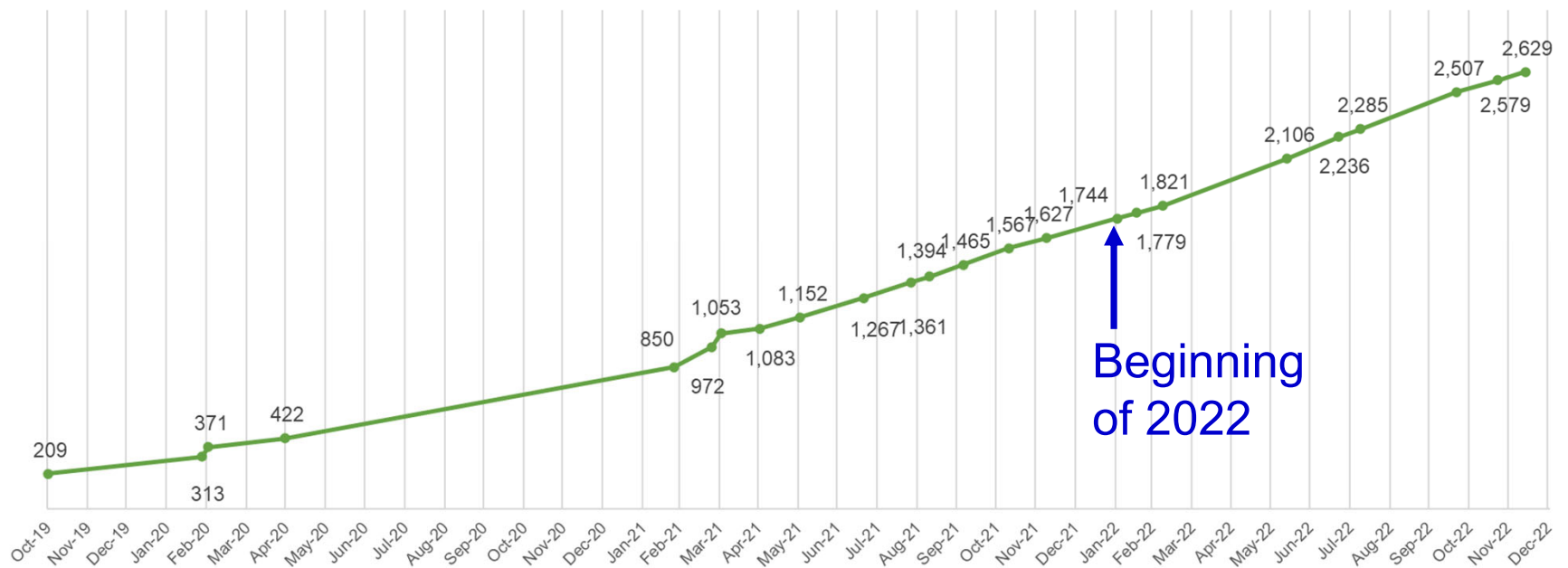
Available in eTRM:
<https://www.caetrm.com/user-guide/>

Available on:
Measure Contributor Resources
SharePoint

eTRM Update

- Continued user base growth
- IOUs using eTRM data for claims

Total eTRM User Accounts



*We want your feedback on training needs and future features!
Contact Ayad or Tomas*

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2023 Business Plan

- 2023 Business Plan
 - Affirmed by the Cal TF PAC on Dec 5
 - Minor changes from the November TF presentation
 - Available at <http://www.caltf.org/what-we-do>
- Key 2023 milestones
- 2023 TF meeting schedule
- New 2023 activities

2023 Business Plan Summary



	2023 Business Plan Goal	Notable Changes from 2022 Business Plan
CORE	1. Administer software development of eTRM v2.x	Complete eTRM enhancement prioritization in 2023 Q2
CORE	2. Ongoing Implementation of Current eTRM Version	Coordinate eTRM Governance with CEDARS/CET Governance
CORE	3. Manage Existing Measure Updates	Added new metric to develop versioning and communication rules for Measure Package Updates
CORE	4. Manage and Implement the Statewide New Measure Development Process	New metric for New Measure Identification Strategy
	5. Develop POU and Statewide Custom Measures 	Added new metrics to organize/prioritize tools/resources/solutions and develop a custom roadmap
	6. Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way 	Separate metric for document review/update Added new metric for regulatory review/updates Update TPP and White Paper topics of interest
CORE	7. Manage the Cal TF and Cal TF PAC	Removed RFQ for TF members (not needed in 2023); plan for more in-person meetings
NEW CORE	8. Develop and Manage Cal TF Roadmap, Business Plan, and Budget 	Added new metrics for 5-year roadmap, workplans, and quarterly Business Plan updates

Key Milestones by Quarter

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Q1	<ul style="list-style-type: none"> • Develop Expanded New Measure ID Strategy (4A) • Draft Custom Roadmap (5B) • Workplans (where required)
Q2	<ul style="list-style-type: none"> • Complete eTRM Enhancement Prioritization (1C) • Final Custom Roadmap (5B) • Draft 5-year Roadmap (8A) • Draft 2024 Business Plan (8B)
Q3	<ul style="list-style-type: none"> • Final 5-year Cal TF Roadmap (8A)
Q4	<ul style="list-style-type: none"> • Complete eTRM Enhancements (1A) • Final 2024 Business Plan and Roadmap Updates (8B)
TBD	<ul style="list-style-type: none"> • White Papers / Technical Position Papers (6A/6B) • Finalize eTRM Governance Plan (2C) • Finalize Cal TF Governance Model (7C)

2023 Schedule – TF Meetings

Date	Location
January 26	LA/OC
February 23*	SF/OAK
March 23	Remote
April 27*	LACI, Los Angeles
May 25	Remote
June 22	SD
July 27*	SF/OAK
No meeting in August	n/a
September 28	SF/OAK
October 26*	LA/OC
November 16	Remote
December 14	Remote

* PAC meeting on the preceding Wednesday

New 2023 Activities

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- 8A. Cal TF 5-year Roadmap
- 8C. Workplans
- 3C. Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates
- 5X. Custom Activities/Roadmap
- 6D. Summaries of relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements

3C. Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates

- Problem statement
- Goals/objectives
- Scope of the initiative
- Expected benefits to stakeholders
- Potential obstacles and preliminary solutions
- Schedule considerations
- Interested/required stakeholders

(Time permitting,
TF will brainstorm
during the
meeting)

6D. Summaries of relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements



- Problem statement
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5-Year Roadmap

- (see 5-Year Roadmap presentation)

Custom

2022 Custom Recap

2023 Custom Plan

Custom Brainstorming
activities

- 2022 Recap
 - Memo: eTRM for Custom
 - Custom Subcommittee
 - Custom Charette
 - Developing SW custom measures/tools
 - Developing eTRM enhancements for custom measures
 - Exploring eTRM options for Custom Calculations, Projects, Workflows

2023 Business Plan, Goal 5: Development POU and Statewide Custom Measures



WP NEW

5A. Gather, organize, and prioritize existing custom guidelines, tools, and resources being used by POU, IOUs, and implementers.

- Compile and organize the guidelines, tools, and resources used by custom program stakeholders
- Identify which materials are used and useful and potentially overlapping
- Compare collected resources to assess the value of SW standardization for POU/IOU custom portfolios
- Develop plan to improve approach to summarizing and providing clear CPUC guidance on custom projects
- Work through committee to identify and prioritize custom standardization efforts
- Update list of potential measures that could be uploaded and managed in eTRM

WP NEW

5B. Finalize Custom Roadmap by 2023 Q2

- Build on 2022 custom activities to develop Custom Roadmap for PAC, TF, and stakeholders

WP NEW

5C. Develop statewide methods for custom measures

- Process similar to Deemed Measure Package Development for selected custom measures

WP

5D. Update eTRM documentation

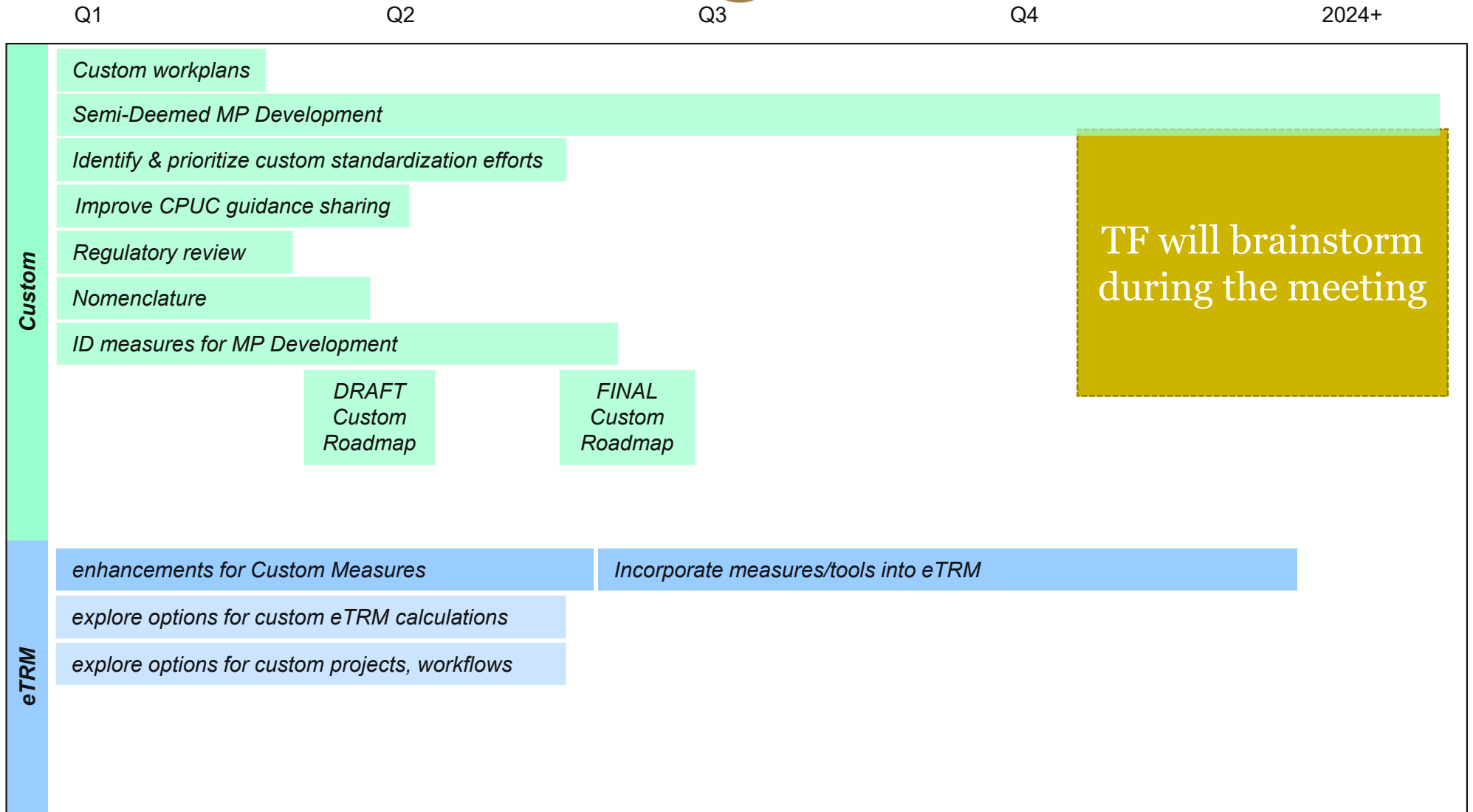
- Update eTRM documentation as needed to include POU and SW custom measures

WP

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

- Work with software developer to determine how custom tools could be moved into eTRM
- Work with the software developer to implement selected custom solutions.

Custom Roadmap



5A. Develop proposal to improve approach to summarizing and providing clear CPUC guidance on custom projects

- Problem statement
- Goals/objectives
- Scope of the initiative
- Expected benefits to stakeholders
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(Time permitting,
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meeting)

White Paper Topics

- Today
 - Review topics & ratings
 - Select topics for small groups
 - Present White Paper template
 - Small group discussions
 - Large group report outs
- Future
 - Continue to share topic ideas/feedback
 - Select 2023 White Paper topic(s)

White Paper Topics

Topic Name	Rank
1: Industry Standard Practice (ISP) Process for Custom Measures/Projects	
2: Analysis Controller to Integrate Energy Plus Prototypes with the eTRM	
3: Load Shape Development and Use	
4: Integrated Data Flow for Energy Efficiency	
5: GHG Calculation Approach and Data Sources with Recommendations for eTRM	
6: Measure lifecycle integration into eTRM (Potential and Goals, ETP, EM&V, and C&S)	
7: Dual fuel gas and electric measures	

Cal TF will update with
TF member survey scores

Topic descriptions and additional stakeholder notes (collected through survey) will be posted to the Cal TF website under meeting materials.

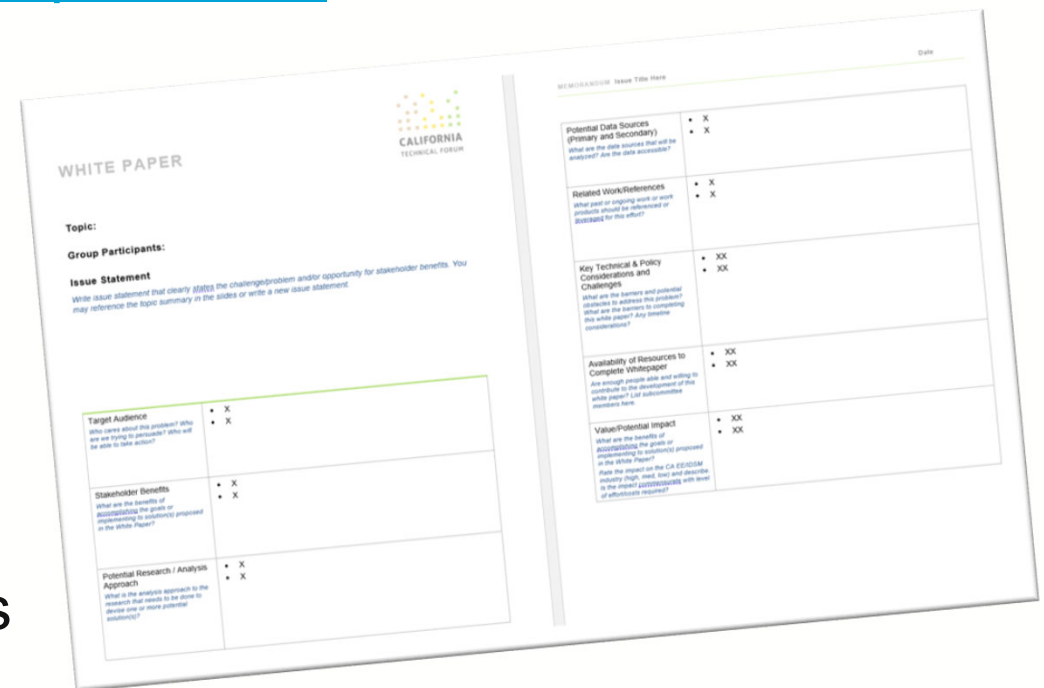
White Paper Topics Template

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Download from Cal TF Meeting Materials:

[White Paper Brainstorming Template Link](#)

- Issue Statement
- Target Audience
- Stakeholder Benefits
- Potential Research/Analysis Approach
- Potential Data Sources
- Related Work/References
- Technical/Policy Considerations
- Availability of Resources to Complete Whitepaper
- Value/Potential Impact



WHITE PAPER

CALIFORNIA TECHNICAL FORUM

Topic:

Group Participants:

Issue Statement
Write issue statement that clearly states the challenge/problem and/or opportunity for stakeholder benefits. You may reference the topic summary in the notes or write a new issue statement.

Target Audience Who cares about this problem? Who are we trying to persuade? Who will be able to take action?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Stakeholder Benefits What are the benefits of accomplishing the goals or implementing the solution proposed in the white paper?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Potential Research / Analysis Approach What is the analysis approach to the research that needs to be done to develop one or more potential solutions?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

MEMORANDUM Issue Title Here _____ Date _____

Potential Data Sources (Primary and Secondary) What are the data sources that will be analyzed? Are the data accessible?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Related Work/References What past or ongoing work or work products should be referenced or distributed for this effort?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Key Technical & Policy Considerations and Challenges What are the primary and potential obstacles to address the problem? What are the barriers to completing this white paper? Any barriers considered?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Availability of Resources to Complete Whitepaper Are enough people able and willing to contribute to the development of this white paper? List subcontractors here.	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Value/Potential Impact What are the benefits of accomplishing the goals or implementing the solution proposed in the white paper? How does the project on the CA E2/E3/EM industry (P&I) meet state and federal industry (P&I) goals and objectives with respect to accountability with level of effort/level of resources?	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

White Paper Topic Brainstorm

25

- **Small Group Brainstorm (2:30 to 3:30)**
 - Select SCRIBE to take notes
 - Select REPORTER to share with full group
 - Complete White Paper Template as a group
- **Reconvene at 3:30pm**
- **Large Group Report-Outs (3:30 – 4:00)**
 - Share highlights of discussion
 - Share priority and timing
 - Turn in notes to Cal TF Staff

Closing & Next Steps

- Action Items
- Looking Forward
 - 2022 Business Plan Update
- Next TF Meetings
 - January 26 in-person (LA/OC)
 - February 23 in-person in (SF/OAK)
- Happy Holidays!