# Regulatory Update: Draft DEER Resolution E-5082



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# Overview of E-5802





- Transition from DEER to eTRM
  - Background
  - Transition Plan
    - ▼ Phase 1
    - × Phase 2
  - Goal
  - Kudos
- Other Cal TF Directives
- Other Items to Note
- Due Date for Comments; Expected Date for Final Resolution

# Background





- DEER started by CEC in 1990s
  - Broad stakeholder collaborative contributed to measure parameter development
- DEER transitioned to CPUC in 2006 2008

Since the 2006 – 2008 portfolio cycle, many technological advances have occurred in the database space, and we seek to now modernize the architecture of the DEER and workpaper project archives to create a truly relational database that can be searched, referenced and updated more efficiently and reliably. (p. 6)

# **Transition Plan**





CPUC Staff is developing a multi-year transition plan to progressively transition DEER and workpaper systems to a software platform . . . called the electronic Technical Reference Manual (eTRM). (p. 6 – 7)

## **Transition Plan**





# eTRM will be "conditional" Datasource of Record until CPUC's Phase 1 and Phase 2 requirements are met.

Phase 1 (eTRM meets User Requirements):

Phase 1 establishes that the **eTRM reflects official ex ante data** and displays current approved ex ante measure data for statewide measures and will be completed by **Q3, 2020**. (p. 7)

Phase 2 (eTRM meets CPUC Needs): Phase 2 covers:

Enhancements necessary for the eTRM to meet the Deemed Data Standard. (p.7)

- Integration with CEDARs and CET
- Build out of CPUC "User Role" that will allow CPUC review of WP in eTRM instead of WPA
- Support tables maintained in eTRM instead of EAdB by CPUC consultants
- Other CPUC requirements
- Starts: later in 2020, must be completed by June 2021

### Goal





Once all activities under Phase 1 and Phase 2 are satisfactorily completed, the CPUC will remove the "conditional" status and adopt the eTRM as the official database of record. (p.11)

#### Also:

- WPA retired
- DEER archived

## Kudos





# The eTRM resulted from a multi-year, highly collaborative effort involving:

- Cal TF Members
- Cal TF PAC
- Utilities, both IOUs and POUs
- Two regulatory agencies: CPUC and CEC
  - Both staff and their consultants
- SBW & OMBU
- Cal TF Staff
- Outside experts who volunteered their time

# Other Directives to Cal TF





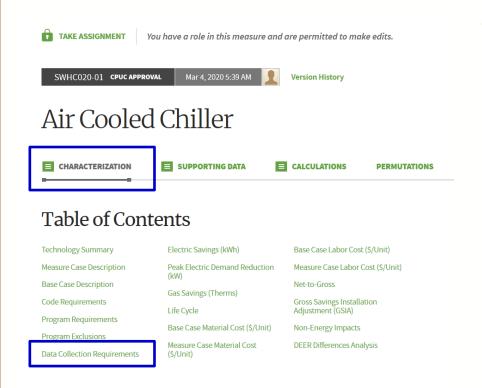
Add program tracking and evaluation requirements to the deemed workpaper template. A number of EM&V reports expressed issues with obtaining the data needed to effectively evaluation upstream and midstream programs. ... To systematically capture data needed, add a "Program Tracking Data and Evaluation Requirements" section to the deemed workpaper template, and CPUC Staff will work with the Cal TF, PAs, and evaluation staff to develop the specification. (p.16)

# Other Directives to Cal TF





eTRM already has a field "Data Collection Requirements"



- Savings & Cost methodology guidelines reiterate this need:
  - Savings Guideline 3: Document influential parameters for sensitivity analysis
  - Savings Guideline 7: Identify inputs that should be collected through programs
  - Cost Guideline 11: Define data to be collected during implementation
  - Cost Recommendation: Integrate Data Needs into eTRM / Leverage eTRM to Support Measure Update Planning / EM&V

# Other Items to Note





- Methodology updates
  - e.g. Load Shapes
- Error corrections
  - e.g. Interactive Effects Tables
- Measure-level parameter changes based on EM&V studies
  - Several measure-level NTG value changes
  - Both directions some will increase, some will decrease cost effectiveness

# Comments and Final Resolution





- Comments on draft resolution due by August 12, 2020
- Final resolution expected by August 27, 2020