

2024 Business Plan: Q1 Progress Update

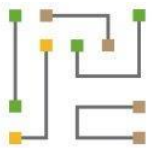


CAL TF STAFF
MARCH 27, 2024 PAC MEETING

2024 Business Plan Goals

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Cal TF 2024 Business Plan



Goal 1: eTRM Management & Measurement



Goal 2: Measure Management



Goal 3: New Measure Rapid Screening, Evaluation and Development



Goal 4: Data Integration and Data Analytics



Goal 5: Custom Initiative



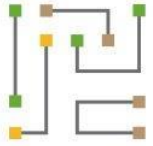
Goal 6: Technical Issue and Technical Policy Analysis



Goal 7: Cal TF, PAC and Stakeholder Engagement and Management

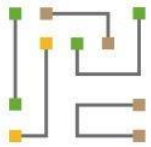
Contents

- **Q1 Highlights**
 - New PAC and TF Members
 - Statewide deemed collaboration focused on supporting Energy Plus commercial prototype issues
 - Custom Initiative – CPUC Engagement/Collaboration
 - Two more Custom Measure Packages (CMPs) for TF Affirmation
 - Finalized 2023 Cal TF Technical Paper and White Paper for Affirmation
 - “One-Pagers” for Broader Stakeholder Engagement
- **Appendix: Progress Update by BP Goal**



- eTRM Roadmap Workplan In Progress
 - Tracks include:
 - New Modules
 - New Measures
 - Performance / Stability
 - Security
 - Integration
 - Development Standards
 - Governance

- eTRM development
 - Sprint 25 – Measure Development Report complete
 - Release planned for week of April 29th



eTRM Management & Measurement

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- Statewide processes
 - Sunset measures, change requests, adopting measures
- Energy Plus collaboration
 - Justified vintage consolidation – significantly reduces number of permutations
 - Defined “New” vintage as Title 24-2025 – avoids having to re-model again before 1/1/26
 - Fixed model faults – solves model errors with a consistent approach
 - Collaborating on creating HVAC type parameterization – shares solutions that can be reused and only checked once
 - Highlighting missing refrigeration models
 - Parameterizing refrigeration models – extends usability of prototypes across several developers
 - Shifted from model Res water heating to WH Calculator – allows developers to move forward with a far simpler solution
 - Aligned post-processing scripts to eTRM inputs – improves integration and plans for potential re-modeling efforts
 - Clarified Tech ID creation – clarifies a new requirement
 - Clarified file type creation and storage – clarifies a new requirement
 - Supporting Auto-Size vs Hard-Size modeling issues – addresses a known issue for res



Measure Management

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- 54 Measures submitted to Manager Review
 - 3 New Measures
 - 51 Measures Update:
 - ✦ DEER2026 standard updates (Delivery Type, MIT, etc)
 - ✦ Costs updates
 - ✦ NTG updates

- 17 Measures selected for Cal TF Staff Review
 - Selection based upon varying:
 - ✦ Measure developer
 - ✦ Use category
 - ✦ Reason for update
 - 2 measures with critical errors (with exclusion rules)



New Measure Activity

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- Supporting a new measure type: EE with Load Shifting
 - Collaborating with PG&E to request CET field (UnitMiscBens) so that it impacts cost-effectiveness
 - New efforts with SCE and phase-change materials identified that could also leverage benefits
 - Working with CPUC/DNV to mimic quarterized, avoided cost calculations
- Engaging with CalNEXT to encourage Tech Transfer



Custom Initiative

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- Six Key 2024 Custom Initiative Activities
 - Develop Custom Rulebook
 - Custom Project Documentation Templates – Streamline and Simplify
 - Develop Additional “Custom Measure Packages”
 - Develop Baseline Database and Prospective Statewide ISP Development Process
 - “Templatizing Attribution”
 - ✦ Develop Custom Influence Templates
 - Develop Custom Tool Library



Custom Initiative

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- CPUC Engagement / Collaboration
 - CPUC has committed to review of Custom Measure Packages (CMPs) within three weeks
 - Cal TF Staff engagement, coordination and collaboration with CPUC Staff Continuous Improvement Initiatives
 - ✦ Custom Project Review (CPR)
 - ✦ Project Feasibility Study



Technical Papers

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- TPP No. 13 Custom Policy Initiative (2023 TPP)
 - For PAC and TF affirmation
- White Paper on Industry Standard Practice (ISP) (2023 White Paper)
 - For PAC and TF affirmation
- Two Draft One-Pagers
 - 2022 Energy Efficiency Snapshot
 - Cal TF Custom Initiative



Cal TF, PAC and Stakeholder Engagement and Management



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- Three new PAC Members
 - CEDMC – Joe Desmond
 - PG&E – Paolo Pecora
 - NAESCO – Natasha Shah, SVP Government Strategy

- New TF Members
 - Nicholas Fette, Lincus Energy



Cal TF, PAC and Stakeholder Engagement and Management



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- 2024 Cal TF Subcommittees and Working Groups
 - Custom Subcommittee
 - ✦ Custom Measure Package Working Groups
 - Deemed Measure Subcommittee, including
 - ✦ eTRM Roadmap, Permutation Streamlining, Deemed Measure Improvements
 - New Measure Screening Committee
 - Measure Property Data Working Group
 - Deemed Measure Coordination Meetings with PAs

2024 Business Plan: Q1 Progress Update



**APPENDIX A: PROGRESS UPDATE BY
BUSINESS PLAN GOAL AND METRIC**

Goal 1 Metrics

eTRM Management
and Measurement

- 1A. Create eTRM Development Roadmap
 - Workplan in progress, under review

- 1B. Implement Selected eTRM Enhancements
 - Sprint 25 completed; Sprint 26 under development
 - Release v2.8 scheduled for week of Apr 29th
 - Quarterly eTRM performance tracking

- 1C. Establish Consistent Statewide Processes and Approaches for Deemed Measures
 - Energy Plus collaboration (fixed prototype errors; updated single existing vintage and new Title 24-2025 vintage; collaborated on HVAC types; aligned post-processing script with eTRM; created TechID tool; finalized residential water heating approach; *discussing capacity sizing*)
 - Statewide Process links
 - Measure Property Data batch 1 and 2 completed and ready for upload into eTRM

Goal 2 Metrics

Measure Management

- 2A. Solicit Stakeholder Input on Current Deemed Measure Development and Updating Process, then Track/Report on Relevant Metrics
- 2B. Establish, Implement, and Monitor Measure Development and Updating QA/QC Standards for eTRM
 - Ongoing - Cal TF Review sampling plan

Goal 3 Metrics

New Measure Rapid
Screening, Evaluation
and Development

- 3A. Identify and facilitate Measure Screening Committee (MSC) evaluation of at least twenty (20) New Measures
 - 2 new proposals from Implementer/3P
 - 2 new proposals from CalNEXT
- 3B. Support Development of New Measures

Goal 4 Metrics

Data Integration and
Data Analytics

- 4A. Organize and Lead Data Charette #3; Prepare Summary Report
 - Incorporated into eTRM Roadmap

Goal 5 Metrics

Custom Initiative

- 5A. Custom Rulebook
 - **Ongoing** - consolidation of rules/guidance; mapping “guidance universe”; CPUC engagement to summarize non-public guidance
- 5B. Custom Templates
 - **Ongoing** – compiling and comparing templates; Cal TF Staff participating in CPUC’s PFS Working Group
- 5C. Develop 10 SW CMPs and 10 SW Custom Tools
 - **Milestone! CPUC committed to reviewing CMPs**
 - ✦ Several items waiting for CPUC Review
 - Submitted to TF Affirmation on 3/28
 - ✦ Boiler Add-On, Pump Systems
 - Active Working Groups
 - ✦ Compressed Air, MF Existing Whole Building, NonRes New Construction Systems
- 5D. Custom Policy Initiative
 - Revised Draft TPP on Custom Initiative
 - One-pager on Custom Initiative
- CPUC CPR Initiative
 - Coordinating with CPUC on CPR Initiative Workplan and activities/priorities to achieve impact



Custom Measure Packages

Working Groups



- Compressed Air
- MF Whole Building
- NonRes New Construction

TF Affirmed



- Pump Systems (3/28)
- Steam Boiler Plant (3/28)
- HVAC RCx
- Chiller Systems

CPUC Review



- Steam Boiler

Goal 6 Metrics

Technical Issue and
Technical Policy
Analysis

- 6A. Develop at least one TPP
 - 2024 Cal TF TPP:
 - ✦ Status of California's EE Portfolio (Data/Analysis, including market feedback)
 - ✦ Identifying Remaining Key Challenges ("beyond Custom")
 - ✦ Developing Proposed Solutions
 - ✦ Form: One-Pagers
- 6B. Develop at least one white paper
 - Yet to be determined, likely approach to Measure and eTRM Streamlining

Goal 7 Metrics

Cal TF, PAC and
Stakeholder
Engagement and
Management

- 7A. Conduct at least 10 TF meetings; organize and lead subcommittee and ad hoc meetings
 - Ongoing
 - Custom Subcommittee (1st Wednesdays)
 - Deemed Measure Subcommittee (new – tbd)
- 7B. Conduct 4 PAC meetings; ad hoc as needed
 - Ongoing
- 7C. Develop and finalize the 2025 Cal TF Business Plan
- 7D. Update 5-year Roadmap in Conjunction with the Business Plan Update Process