Technical Forum
New Member Orientation

CALIFORNIA
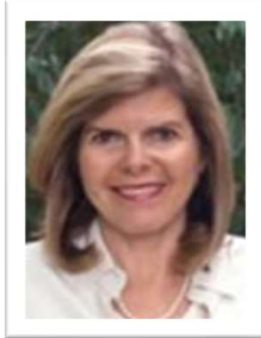TECHNICAL FORUM

ARLIS REYNOLDS
AYAD AL-SHAIKH
JULY 25, 2022

Agenda

- Welcome and Introductions – 20 mins
- About Cal TF – 8 mins
- The Technical Forum & Key Initiatives – 7 mins
- Prep for July TF Meeting – 10 mins
- Open Q&A – 10 mins

- We are recording this meeting for future reference.

Cal TF Staff

Annette Beitel
Chicago, IL

Ayad Al-Shaikh
Half Moon Bay, CA

Arlis Reynolds
Costa Mesa, CA

Tomas Torres-Garcia
San Bernardino, CA

Chau Nguyen
San Jose, CA

New TF Members

Name	Organization
Adan Rosillo*	PG&E
Anders Danryd*	SCG
Andres Fergadiotti	SCE
Arash Kialashaki	PG&E
Briana Rogers	AESC
David Chan	Enovity
Denis Livchak	Synergy Energy
Jay Bhakta*	SCE
Kristin Heinemeier	Frontier Energy
Lake Casco	TRC
Myrna Dayan	Cascade
Roger Baker	Independent Consultant

* Replacing departing IOU TF member

Self-introduction:

Name

Where you live

Where you work

If you were an EE measure, which would you be?

New members are on the TF Member Webpage: http://www.caltf.org/tf-members
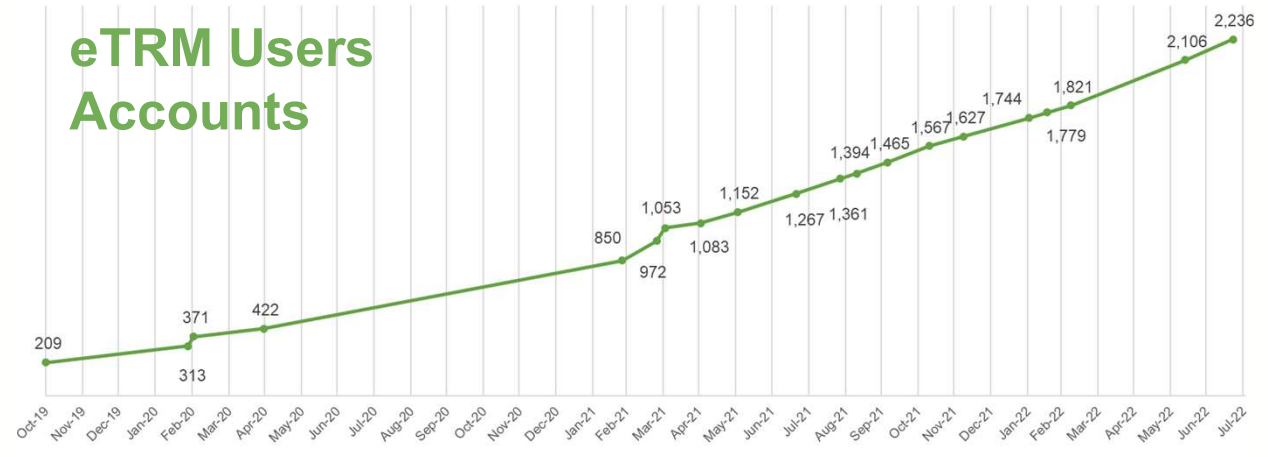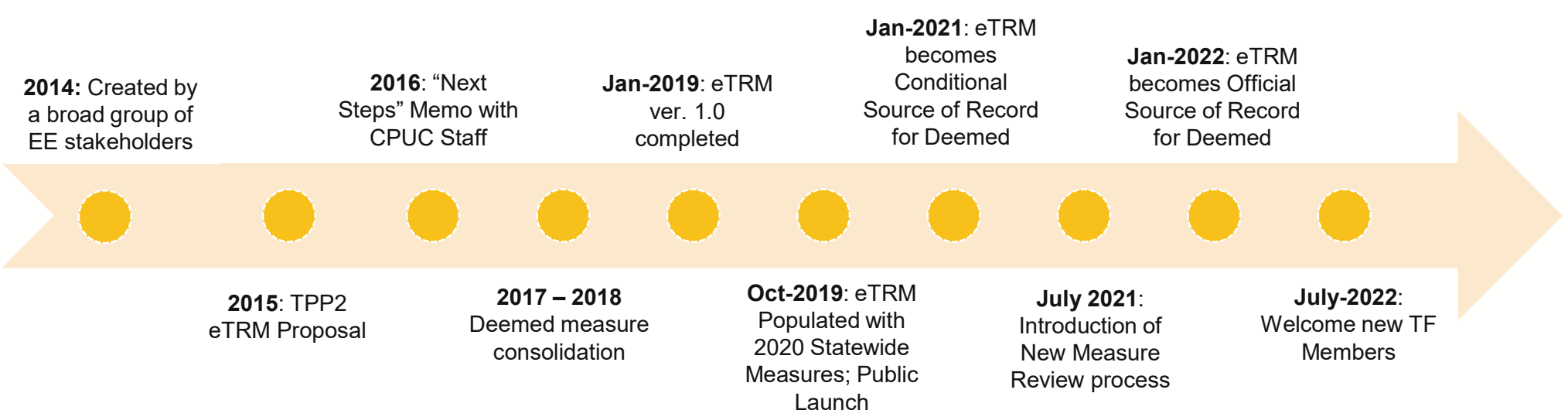
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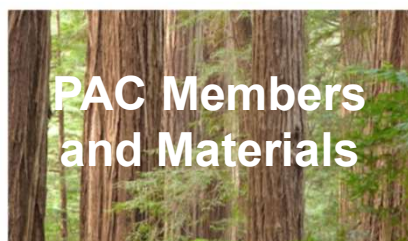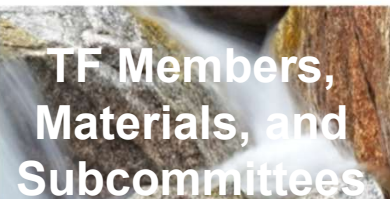| Vision	• A respected source of California EE savings estimates and other technical information related to California's integrated demand-side management (IDSM) portfolio.
Mission	• To support the growth and success of EE and IDSM through a technically **rigorous**, **independent**, **transparent** peer review of California EE values and other related technical information.

Key Milestones

CALIFORNIA TECHNICAL FORUM

2014: Created by a broad group of EE stakeholders

2016: "Next Steps" Memo with CPUC Staff

Jan-2019: eTRM ver. 1.0 completed

Jan-2021: eTRM becomes Conditional Source of Record for Deemed

Jan-2022: eTRM becomes Official Source of Record for Deemed

2015: TPP2 eTRM Proposal

2017 – 2018 Deemed measure consolidation

Oct-2019: eTRM Populated with 2020 Statewide Measures; Public Launch

July 2021: Introduction of New Measure Review process

July-2022: Welcome new TF Members

eTRM Users Accounts

209
313
371
422
850
972
1,053
1,083
1,152
1,267
1,361
1,394
1,465
1,567
1,627
1,744
1,779
1,821
2,106
2,236

Oct-19 Nov-19 Dec-19 Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 May-21 Jun-21 Jul-21 Aug-21 Sep-21 Oct-21 Nov-21 Dec-21 Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22

Cal TF Website

Cal TF Website
www.caltf.org

Business Plans

PAC Members and Materials

TF Members, Materials, and Subcommittees

Calendar

eTRM www.caetrm.com

Tools, Templates, and Guidelines

Submit a Measure

Statewide Measures

Information, resources, and links at http://www.caltf.org

Cal TF Organization

CALIFORNIA
TECHNICAL FORUM

Policy Advisory Committee (PAC)

- Statewide EE stakeholders
- Sets strategic direction for Cal TF
- Sets vision, mission, and guiding principles
- Approves annual business plan and reviews progress
- Approves TF Members

Technical Forum (TF)

- Independent subject matter experts
- Peer reviews methodologies, data, assumptions, and values
- Renders technical judgements
- Hosts subject or task-specific committees and subcommittees
- Meetings are public

Cal TF Administrator (Cal TF Staff)

- Facilitates an open, transparent technical review process
- Develop some technical work products for Cal TF affirmation
- Maintains a website of Cal TF materials and TF recommendations

Policy Advisory Committee

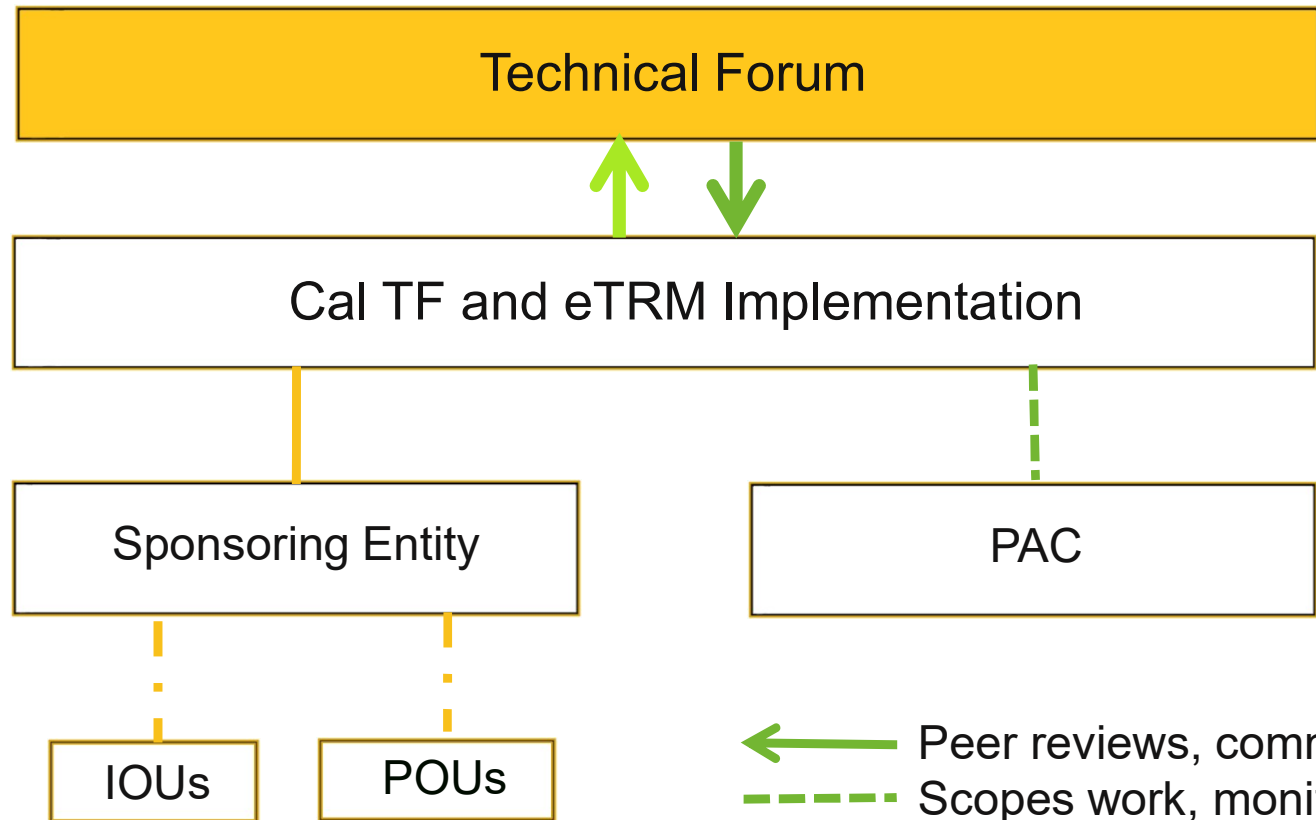PAC Member Webpage: http://www.caltf.org/pac-members
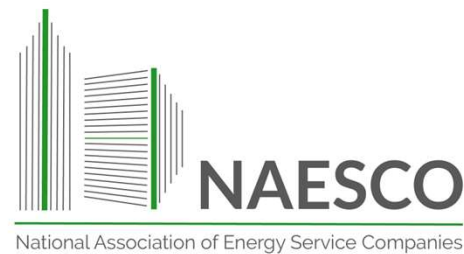
Cal TF Operating Structure

The collaborative supports the technical experts

```
Technical Forum
        ↑  ↓
Cal TF and eTRM Implementation
     |                    |
Sponsoring Entity        PAC
   |      |
 IOUs    POUs
```

←——— Peer reviews, comments
- - - - Scopes work, monitors
←——— Facilitates, supports

———— Administrator Contract
- · - · Co-funding Agreements

Technical Forum

- A group of technical experts that works in a **collaborative** and **transparent** way to review new and updated **EE measures** and other technical information related to California's IDSM portfolio.

- Render **technical judgments** on matters set forth in approved business plan.

- Relies on **consensus-based** decision making

- Members act as **independent experts** and do not represent their organizations

- Members are **ambassadors** for the TF

TF Members (2022-2023)

- **36** total members
  - 12 new members
  - 24 returning members
- **Highly qualified new members**
  - **18 years** average years of experience in EE
  - **10 years** average years of experience with collaboratives
  - **10** professional engineers

- TF Member Webpage
  - http://www.caltf.org/tf-members

TF Member Responsibilities

- Abide by:
  - Cal TF Code of Independence
  - Cal TF Code of Conduct
- Attend Monthly TF meetings
  - Advance review of meeting materials
  - Full & active participation in TF meetings
- Participate on @least 1 subcommittee
- Peer review of @least 1 workpaper, TPP, or equivalent

Current Key Initiatives

eTRM

- Enhancements for eTRM v2.x
- eTRM technical guidance
- Socialize eTRM 2022 enhancements
- eTRM governance plan

Existing Measure Updates

- Measure management
- Metrics for existing measure updates
- Monthly meetings for Statewide Deemed Measure List

New Measure Development Process

- Measure Identification
- Measure Screening Committee
- New Measure Cal TF Affirmation Approach

Custom

- Develop statewide tools for select custom measures
- Identify required eTRM enhancements for custom integration
- Examine other eTRM Custom Solutions
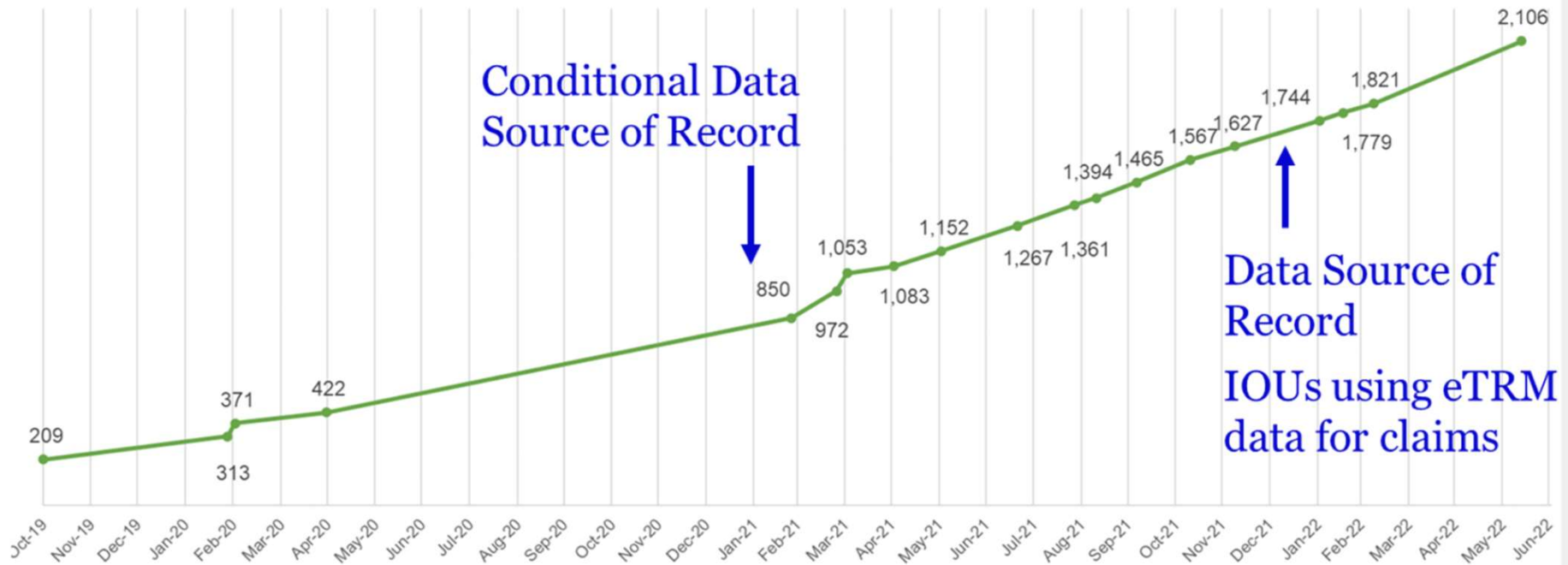
July 27 TF Meeting

- **Part 1 (9:30 a.m. – 11 a.m.)**
  - ❑ New Member Introductions
  - ❑ Existing Measure Updates
  - ❑ New eTRM Tools Available

- **Part 2 (1 p.m. – 2:30 p.m.)**
  - ❑ Custom – Overview and Subcommittee Starting
  - ❑ New Measure Process – List and Affirmation Process

- Meeting materials
  - ❑ http://www.caltf.org/tf-meeting-materials

eTRM Update

Total eTRM User Accounts

Conditional Data Source of Record

Data Source of Record

IOUs using eTRM data for claims

209, 313, 371, 422, 850, 972, 1,053, 1,083, 1,152, 1,267, 1,361, 1,394, 1,465, 1,567, 1,627, 1,744, 1,779, 1,821, 2,106

Phase 2 (cont.) 2022

	Monday is	Apr-11	Apr-18	Apr-25	May-2	May-9	May-16	May-23	May-30	Jun-6	Jun-13	Jun-20	Jun-27	Jul-4	Jul-11	Jul-18	Jul-25	Aug-1	Aug-8	Aug-15	Aug-22	Aug-29	Sep-5	Sep-12	Sep-19	Sep-26	Oct-3	Oct-10	Oct-17	Oct-24	Oct-31
Development		S13					S14			Extra Hours			Mini sprint						S15			S16				Extra Hours					
Stakeholder demo																															
Integration testing (OMBU)																															
Release acceptance																															
Production launch															2.4.0															2.4.x

7/22/2022

New Measure Development Process

- **Measure Screening Committee voting members are appointed by organization leads**

- **New measures under development will be brought to Cal TF Members* for input and affirmation**
  - ❑ Affirmation votes are consensus driven where we ask for those "for" and "against"

Measure Development Process
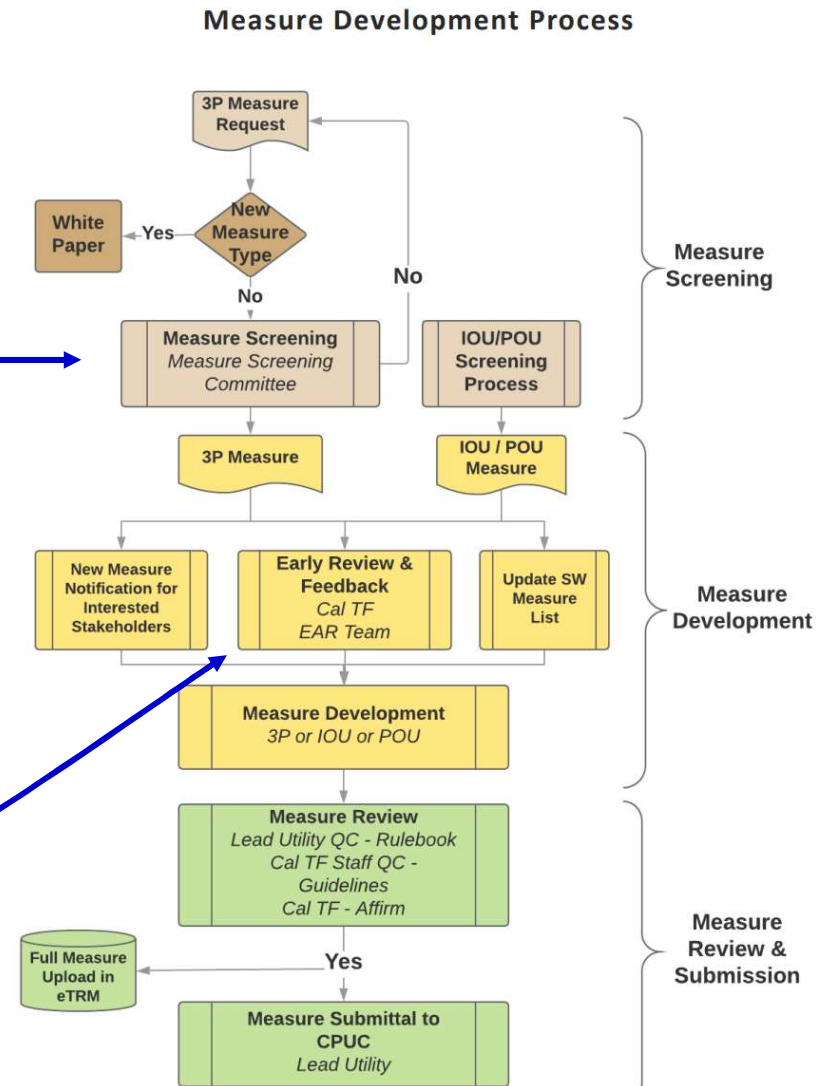
(see TPP-11 for details of process)

7/22/2022

Leveraging the eTRM for Custom

Improvement Opportunity Areas

Overarching	Workflow Process	Project Submittal Quality

Benefits

Cost Savings	Time Savings	Transparency	Standardization	Stakeholder Engagement & Customer Experience

Outcomes

Reduced stakeholder frustration	Better project quality	Reduced time/cost for ex ante and ex post reviewers	Higher/broader implementer participation	Higher program throughput and savings

Custom eTRM Memo on website: http://www.caltf.org/tf-meeting-materials

Custom Next Steps

- ## Engineering
  - ❑ Collect custom tools/data requirements
  - ❑ Review/standardize through Cal TF subcommittees

- ## eTRM Updates
  - ❑ Refine enhancements to eTRM so custom tools can be uploaded, and later possibly customer projects

- ## Ongoing Stakeholder Input
  - ❑ Continue to solicit input/comment from key stakeholders to develop/refine potential eTRM Custom Solutions

What tools do you have that can be recommended for Statewide Semi-Deemed measures?

TF Meeting Schedule

Date	Location
July 27, 2022	Online webinar / teleconference
August 25, 2022	Online webinar / teleconference
September 22, 2022	Online webinar / teleconference
October 27, 2022	Online webinar / teleconference
November 17, 2022	Online webinar / teleconference
December 15, 2022	Online webinar / teleconference

Thank you!

- Your contribution as TF members will help shape the California clean energy industry to be more **technically robust**, **transparent** & **collaborative**.

- Contact us anytime with questions/suggestions:

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