Cal TF 2019 Achievements Relative to Goals

CALIFORNIA
TECHNICAL FORUM

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DEC 16TH – PAC MEETING

Guiding Principles

- Technical Rigor
- Transparency
- Statewide Consistency
- Broad and Frequent Stakeholder Input
- Significant Cost Savings/Process Efficiency
- Reach High; Best in Class

- If needed "***Burn the Fields***"

Examples

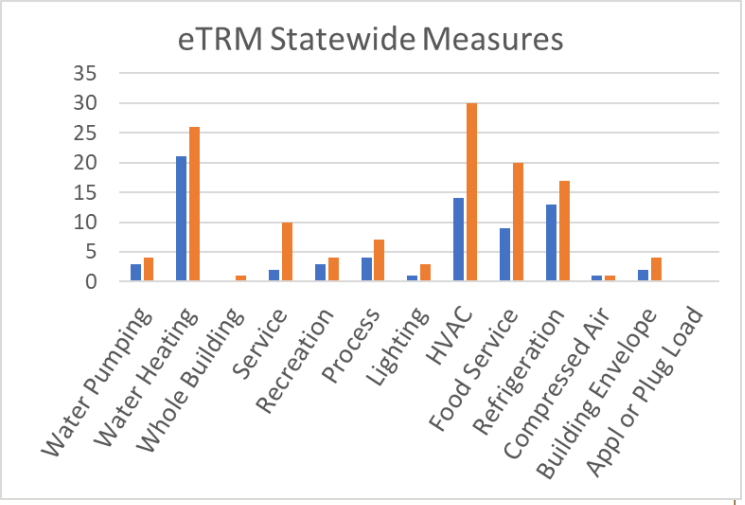
Example 1: eTRM replacing DEER

Example 2: Statewide measures replacing individual utility workpapers and POU TRM

2019 Business Plan Goals

1. Complete eTRM Deemed Measure Upload
2. Develop Stage 2 Issue Roadmap
3. Manage the eTRM
4. Develop eTRM Transition/Leveraging Plan
5. Advance Statewide Consistent Approach to Energy Modeling
6. Conduct Research to Integrate Cal TF/eTRM with EM&V Planning Processes
7. Manage Statewide Deemed Measure List
8. Manage the Cal TF and Cal TF PAC
9. Develop the 2020 Cal TF Business Plan
10. Fulfill CPUC directives to Cal TF for Low-income measures

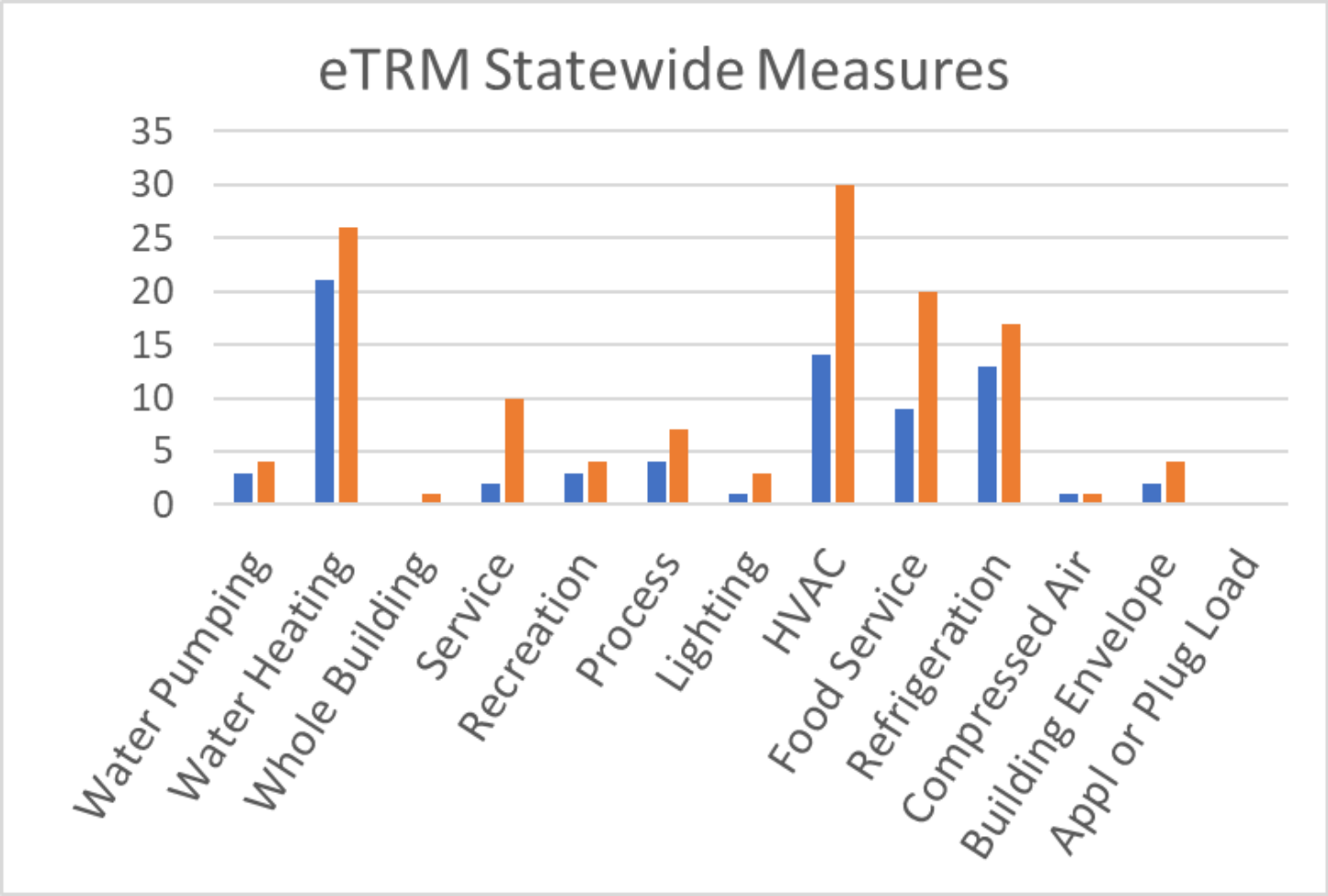
Goal 1: Complete eTRM Deemed Measure Upload



- eTRM has Launched!
  - Aug 1st
    - All measures approve by CPUC were uploaded
    - Measures planned but not yet submitted were upload (approx. 140)
  - Oct 15th
    - Soft Launch of the eTRM
    - All CPUC approved measures were QC'ed and *Published* (82 measures)
  - Ongoing
    - IOUs continuing to submit measures for 1/1/2020
    - Measures Published on when they are approved by the CPUC
    - Expecting about 140 measures available for 2020

Goal 1: Complete eTRM Deemed Measure Upload

- eTRM has Launched!



Goal 2: Develop Stage 2 Issue Roadmap

- TPP 9 – Deemed Measure Consolidation: Stage 1 and Stage 2 Issues
  - Completed: February 2019
- Completed more than 40 issues through 2019
- Planning for DEER 2022 Updates
  - EUL policy for AOE measures (*longer life*)
  - Missing EUL IDs for Host equipment (*missing information*)
  - AR guidance to all more existing conditions (*new measures*)
  - Defining existing conditions for AOE measures (*new measures*)

Goal 3a: Manage the eTRM

- Training objectives completed
  - Conducted training for core users
    - January 29 and January 31, 2019
  - Conducted two public training sessions
    - February 21 and March 4, 2019
  - Post-training survey
    - Feedback was very positive for content and ease of navigation

"eTRM is *Fantastic*"

Goal 3b: Manage the eTRM

- eTRM enhancements identified and prioritized
  - List compiled during development and testing
  - Q1 2019: Vetted with funding parties
  - March 27, 2019: Charette with funding parties, developers, stakeholders
    - List was further clarified over subsequent months
  - October 1, 2019: List largely finalized

Goal 4: Develop eTRM Transition/Leveraging Plan

- eTRM Work Plan drafted and socialized
- eTRM Transition / Leveraging Plan drafted and discussed extensively with stakeholders
  - Plan will be circulated for comment by the end of the year

Goal 5: Advance Statewide Consistent Approach to Energy Modeling

- TPP 10: Modeling TPP: Recommendations on Improving Building Energy Modeling in California

- Whitepapers completed for:
  - Statewide measure calculation approach classification
  - Statewide cost approach

- Presenting to Cal TF members Dec 2019 for feedback and direction

Goal 6: Conduct Research to Integrate Cal TF & eTRM with EM&V Planning Process

- Whitepaper completed for eTRM – EM&V Integration

eTRM Maintains:

Program Requirements

Reference Library

Data collection for specific measures:
- Existing Conditions
- Embedded M&V

***eTRM Accelerates*:**
- Accelerates new measures into the portfolio by prescribing data collection requirements

Planned EM&V

***eTRM Manages Data*:**
- References are transparent and visible
- Age of references can be tracked
- Opportunities to make measures stronger can be tracked

***eTRM Links Information*:**
- Uncertain measure list can be made visible to all

Goal 7: Manage Statewide Deemed Measure List

- **Facilitate Statewide Coordination** of IOU and POU Measure Updates, Revisions, and Additions
  - Coordinate monthly review and updates to statewide measure list.
  - Post updated list on Cal TF website monthly.

Goal 8: Manage the Cal TF and Cal TF PAC

- RFQ for Members found 15 great new members

Candidate Experience	Number
Modeling	13/15
EM&V	4/15
NMEC	7/15
C&S	11/15

- **Jeffrey Seto**, AESC
- **Lacey Tan**, Frontier Energy
- **Alfredo Gutierrez**, Lime Energy
- **Abhijeet Pande**, TRC
- **Richard Ma**, Ecology Action
- **Eric Noller**, Energy Resources Integration, LLC
- **Jonathan Pera**, Willdan Energy Solutions
- **Mudit Saxena**, Vistar Energy
- **Charles Ehrlich**, Independent Consultant/PG&E
- **Akhilesh Endurthy**, Solaris Technical
- **Vrushali Mendon**, Resource Refocus
- **Dave Hanna**, Independent Consultant
- **Andrew Parker**, NREL
- **Randy Kwok**, PG&E
- **Scott Blunk**, SMUD

Goal 9: Develop 2020 Cal TF Business Plan

- Developed 2020 Cal TF Business Plan
  - Draft: October 1, 2019
  - Final: December 2019 PAC Meeting

Goal 10: Fulfill CPUC directives to Cal TF for Low-income measures

- Subcommittee Participants/Organizations:
  - Cal TF Staff (T. Melloch, J. Barnes)
  - Cal TF Members (S. Shahinfard, L. Kotewa, P. Landry, A. Saiyan, T. Eckhart)
  - IOU ESA Administrators (PG&E, SCE, SDG&E & SoCalGas)
  - CPUC Staff as observers only
  - NRDC
- Subcommittee Kick off held on April 4, 2019
- Monthly subcommittee meetings & shorter status updates:
  - May, June, August & September
- TPP draft developed in July and circulated to the full subcommittee for review on August 30, 2019
- Current status:
  - TPP finalized on December 12, 2019
  - Will present to the full TF in January 2020

Other

- TPP 11: Statewide New Measure Development and Measure Update Process

- Upcoming steps:
  - Recruit members of “Measure Screening Committee”
  - Train Committee and offer training to prospective submitters
  - Post materials on web
  - PAC Teleconference
  - Launch