Cal TF 2020 Business Plan Review
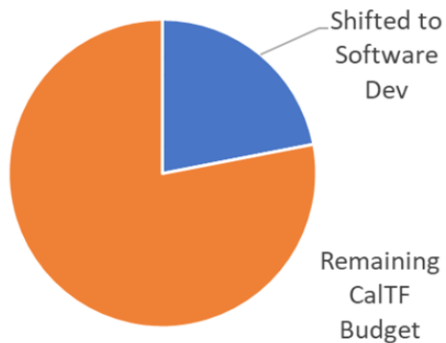
CALIFORNIA
TECHNICAL FORUM

AYAD AL-SHAIKH
CAL TF STAFF
DECEMBER 17, 2020

2020 Business Plan Overview

Cal TF Budget Remaining in September 2020

Shifted to Software Dev

Remaining CalTF Budget

- As of Sept 2020, we were on-track with respect to budget and deliverables

- Due to budget shift late in the year
  - First time that Cal TF is not meeting all its business plan goals
    - Some moved to 2021
    - Others eliminated

- Major accomplishments
  - We had a very successful year

Key:
- ⭐ Goal Complete
- ⭐ Goal In Progress
- ⭐ Goal Delayed/On-Hold
- 🐷 Cost Savings
- 👥 Collaboration
- ✨ More Measures

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- Moved to 2021 Business Plan:
  - ❑ Testing and Acceptance plans
  - ❑ "Value of Cal TF" survey – survey on what activities Cal TF and PAC members, plus broader range of stakeholders who have engaged with Cal TF/eTRM, determine to be most valuable for Cal TF to engage in.
- On hold:
  - ❑ Hybrid measure guidelines and examples
  - ❑ TPP on Cost-Effectiveness
    - ✖ Differences in POU/IOU calculators, key challenges for implementers in computing c/e, and recommendations on how to improve c/e calculation
  - ❑ Updates to on-going white papers for:
    - ✖ Greenhouse Gas Calculation Approach and Data Sources; Recommendations for eTRM
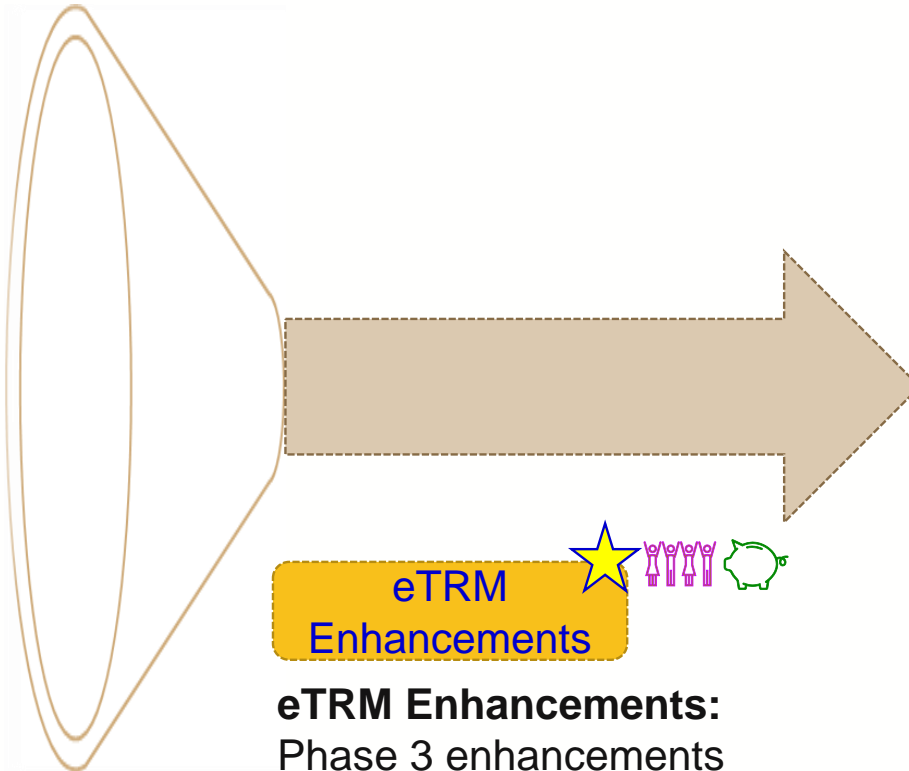   - ✖ Creating Tighter Linkage Between Deemed Savings and EM&V Studies

eTRM Administration

Trainings

eTRM Trainings:
- IOUs and POUs
- WP developers
- CPUC Staff
- CPUC consultants (Group A and Group D)
- CEC (Demand Analysis -> Energy Assessments Division; Energy Research and Development Division)
- Innovators (LACI, individuals submitting to Measure Process)
- Universities (UCD)

Deemed

eTRM

eTRM Enhancements

eTRM Enhancements:
Phase 3 enhancements socialized; mandated by E-5082 (plus more).

Support Users

12/15/2020

Purpose: Phase out DEER Ecosystem

Conditional Data Source of Record 1/4/2021

CPUC-Phase 1

Phase 1 Requirements:
Execute plan to meet conditional data source of record requirements.

Deemed

eTRM

Conditional Data Source of Record

eTRM Transition and Launch Plan

- IOUs - 4
- POUs – 2
- POUs – (Rest)
- CPUC Staff
- CPUC Consultants
- CEC Staff
- 3Ps

eTRM Governance Plan

- CPUC (& CEC?)
- POUs – LADWP and SMUD

Measure Ecosystem
Goal 3 – New Measure Process

⑥

TPP-11: New Measure Process

Manage & Implement Process

Website Launch: May 2020
- Data request tool

Process Launch: June 2020
- Screening Committee Training
- First measure!

Deemed

eTRM
Best-in-Class

Develop Metrics

New Measure Type Memo

Outcomes
- Inclusive committee measure review
- Transparent process
- Feedback *and help* to measure proposers
- New measure forms aligned with Measure Template (so developers will know what is needed for regulatory review/approval and portfolio introduction)

Expanded Measures
- New Measure types
  - EE/DR
  - Bundle packages
  - IoT
  - Targeted measures

…

New Measure Process

Cal TF Website
www.caltf.org

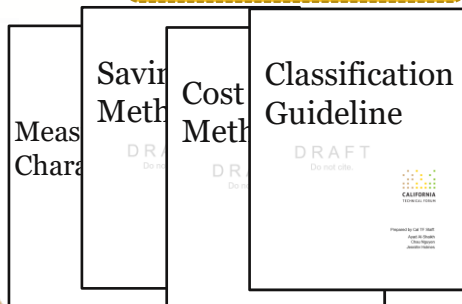| eTRM *www.caetrm.com*	Submit a Measure	Tools	The TF (Subcommittees)
User Guide	Proposal Form	Measure Template Data Dictionary Style Guide	Savings Methodology Cost Methodology Measure Classification

Purpose: Clarity, Consistency and Transparent Approaches

White Papers

Meas Chara | Savin Meth | Cost Meth | Classification Guideline

DRAFT
Do not cite.

Deemed

eTRM

Best-in-Class

Modeled Measure Guidelines ⭐
- Subcommittee developed

Measure Savings Guidelines ⭐

Measure Cost Guidelines ⭐
- Subcommittee developed
- Affirmation planned for Sept mtg

Measure Classification Guidelines ⭐
- In subcommittee development

Guidelines:
- Transparency
- Get it right the first time!
- Lower costs
- Consistency across measures and measure categories

Measure Ecosystem
Goal 4 – Technical Position Paper (TPP)

Purpose: More C/E Measures for Portfolio!

C/E Scope

Deemed

eTRM

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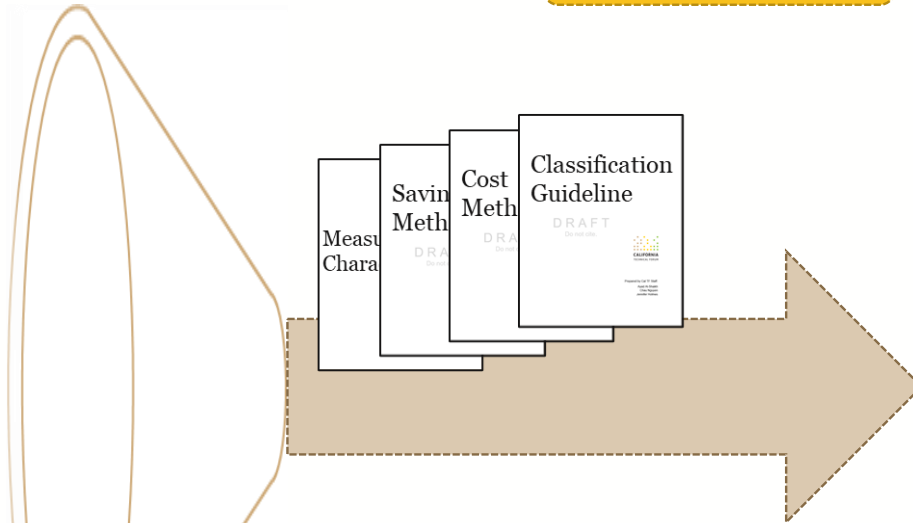
Outcomes:

- Foundational documents
- Not just technical or policy
- Provides a plan for execution
  - Framework
  - Process
  - Collaborative approach for generating consensus

Past Cal TF TPPs:

- Statewide measures (TPP-6) (*400+ measure →130 statewide*)
- eTRM development (TPP-2) (*DEER replacement!*)
- Measure development guidelines (TPP-7) (3P participation in implementation)
- New measure guidelines (TPP-3, 4, & 5) (Maintain workpaper standards)
- New measure process (TPP-8 & 11) (More measures)

Develop Guidelines and Process for Hybrid Measures

Custom

Hybrid

Deemed

eTRM
Best-in-Class

Outcomes:
- Streamlined custom
- Less expensive
- Happier Customers!
- Less frustration for implementers
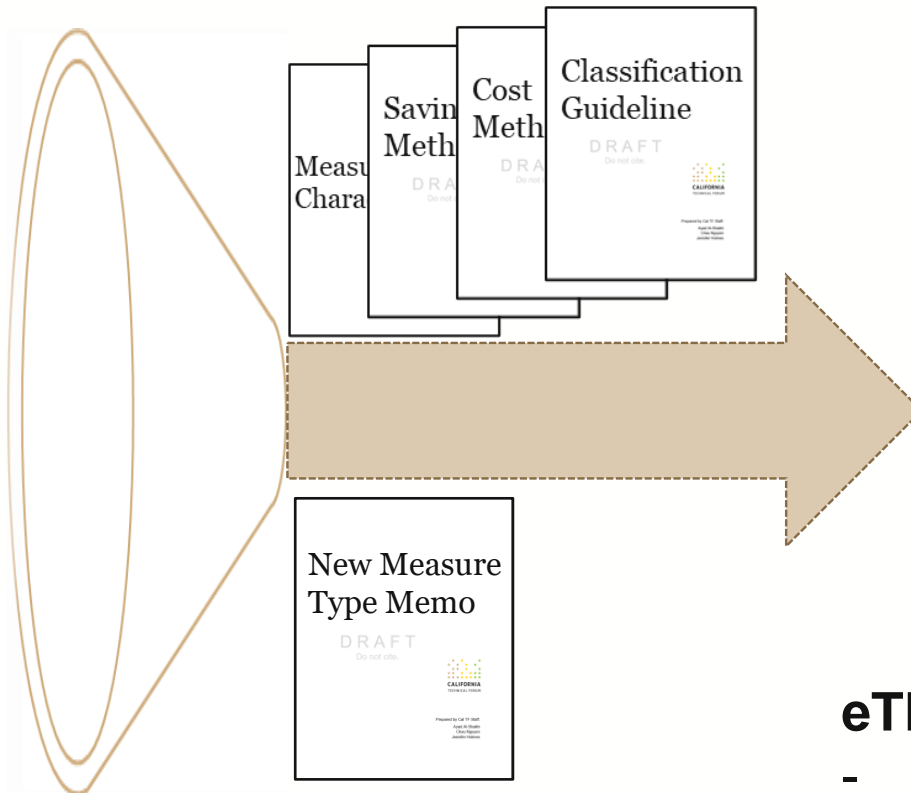
Hybrid / Custom

Hybrid Subcommittee
- Concept discussed with IOU, CPUC, and implement
- Develop definition, guidelines, and process
- Identify and create hybrid measures

POU Custom Project Development and Review White Paper

Classification Guideline DRAFT

Cost Meth

Savin Meth

Measu Chara

New Measure Process

Custom

Hybrid

Deemed

eTRM

Best-in-Class

POU Custom Measure Process

Measure Chara...

Savin... Meth...

Cost Meth...

Classification Guideline

New Measure Type Memo

eTRM, v2.1 (*releasing 1/4/2021*)
- Conditional Data Source of Record
- 140 Statewide deemed measures