

# Cal TF New Measure Process *Update & New Measure Types*

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**APRIL 22, 2021**

# Agenda

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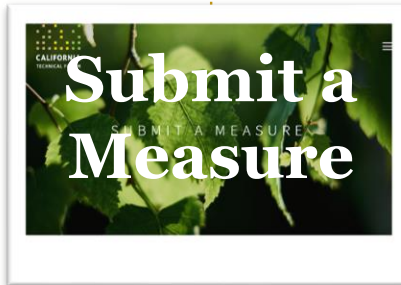
- New Measure Tools
- New Measure Screening Committee Update
- New Measure Types Memo
  - Introduction
  - Plan for afternoon break-out groups

# New Measure Process – Tools / Website

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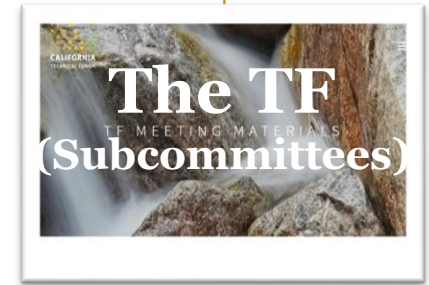
Cal TF Website  
[www.caltf.org](http://www.caltf.org)



Proposal Form  
Workflow  
*New Measure Types*



Measure Template  
Data Dictionary  
Style Guide



Savings Methodology  
Cost Methodology  
Measure Classification

# Screening Committee Team

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## Voting Members:

- IOUs
  - Henry Liu & Danielle Dragon / PG&E
  - Jay Madden & Jay Bhakta / SCE
  - Chan Paek / SCG
  - Ed Reynoso / SDG&E
- POUUs
  - Armen Saiyan / LADWP
  - Michael Corbett / SMUD
- CEDMC (*one vote*)
  - Jim Hanna / Energy Solutions
  - Chris Ford / The Energy Coalition
- NAESCO (*one vote*)
  - Thomas Wray / ABM
  - Mike Casey / Onsite Energy – A Willdan Company

## Non-Voting Members

- CEC
  - Yu Hou / CEC
  - Tiffany Mateo / CEC
  - Jason Tancher / CEC
- CPUC
  - Staff (*tbd*)
  - EAR Team (*tbd*)
- Independent Advisors
  - (*tbd*)
- Cal TF Staff
  - Ayad Al-Shaikh
  - Stefano Galiasso
  - Tomas Torres-Garcia

# New Measure Types Memo

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## Agenda

- Memo Goals and Objectives
- Background
- Framework Review
- Breakout Groups: Goals of Today

# New Measure Types Memo

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## Goals:

1. Increase availability of New Measures
2. Provide a framework to facilitate New Measure development
  - ❑ Structure and simplify Measure Screening Committee evaluation work
  - ❑ Provide clarity on key considerations for each Measure Type (policy + technical)
3. Define Emerging Measure Types and guide policy

# New Measure Types under consideration

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1. Procedural Measures
2. Targeted Measures
3. Bundled Energy Efficiency Measures
4. Software Measures
5. BRO and Service Measures
6. Codes & Standards
7. EUL Extender Measures
8. Industrial Measures
9. Fuel Substitution Measures
10. Self-Generation and Energy Efficiency Bundle Measures
11. Demand Response and Energy Efficiency Bundle Measures
12. Energy Storage and Energy Efficiency Bundle Measures
13. Hybrid (Semi-Deemed) Measures
14. Low Income Measures
15. R&D / EPIC Measures
16. Possible: EV charging / EVs

“Traditional” EE  
Measure Types

Bundled Measure  
Types

 NEW!

# Background

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- Subcommittee Input received on:
  - Bundled Energy Efficiency Measures (see [Cal TF Bundled EE issue statement](#), meeting on April 8, 2020)
  - Bundled Energy Efficiency + Demand Response Measures (see [Cal TF Bundled EE + DR issue statement](#), meeting on April 8, 2020)
  - Fuel Substitution Measures (see [Cal TF Fuel Sub issue statement](#), meeting on April 10, 2020)
- Input collected and “catalogued” into different areas
- Additional data collected from Measure Screening Committee
  - What questions consistently come-up?
  - What is preventing proposals to becoming New Measures?
- Co-mingling input / issues results in a framework to evaluate New Measure Types
  - Cost-effectiveness
  - Data collection
  - Market (size / barriers)
  - Baseline / Measure Case
  - Program Type
  - Cost
  - Parameters... and more



# Framework: visual



	Cost-Effectiveness issues		Data Issues			Market Issues				Baseline issues			
	If the measure is already existing and updates are needed, what is the likely impact to the TRC? (Important if TRC currently at or near 1.0)	NTG: Is there anecdotal evidence that this is going to be a high NTG measure? (e.g. low market adoption, no reason to believe it would change without program intervention)	Is the measure currently incented through the custom program? If yes, what has it been the experience / results under the custom program? Is there available data that can be used?	If continuous data collection (of any kind, market data, sales data, performance data) is required, is that feasible / sustainable? If not, what is the best available proxy	Does measure (or similar measure) exist in the eTRM? If so, requirements must be the same	What data fields / functionalities would need to be added to the eTRM to start tracking it?	Market size: possible issue is that the market size needs to be substantial enough to warrant the work necessary to develop (or even update an existing) workpaper.	What information is needed to better understand market size and market potential? (not anecdotal, based on # of units and combination of program delivery options)	What is the future market potential of the measure? (e.g. trending up / increasing or stable? Pricing going down after something new enters the market?)	If a market study was commissioned, how long would it likely be valid for? E.g. lighting changes rapidly and annual updates may be necessary	New technologies in sight that could replace the proposed measure? E.g. HPWH soon to be offsetting NG / Electric Resistance Heat WH ---> take into consideration before check for Title 20/24 requirements and check for standard practice (ISP). Any new codes that may come in the near term? Is the proposed measure on its way to become standard practice (ISP)?	What kind of documentation can be used to verify the correct baseline? E.g. pictures that show baseline conditions to be met?	Is this a one-for-one replacement or are there different considerations e.g. 2 baseline / 1 measure case?
Procedural measures													
Targeted measures													
Bundled EE measures													
Measures with savings predominantly from software													
BRO & service measures - modifying existing parameters													
Codes & Standards													
EUL extender measures													
Industrial measures													
Fuel Substitution measures													
Generation + EE													
Demand Response + EE													
Storage + EE													

# Structure of Today

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- Deep Dive into 4 New Measure Types
- Structure:
  - 1-hour focused subcommittee feedback on each New Measure Type
  - Two separate Breakout Groups this afternoon

## 1:00 - 2:00 pm: First Breakout Group

- Procedural measures (**Ayad**)
  - <https://global.gotomeeting.com/join/156610101>
- Targeted measures (**Stefano**)
  - <https://global.gotomeeting.com/join/285461045>

## 2:00 - 3:00 pm: Second Breakout Group

- Bundled EE measures (**Ayad**)
  - <https://global.gotomeeting.com/join/156610101>
- Measures with savings predominantly from software (**Stefano**)
  - <https://global.gotomeeting.com/join/285461045>

# Goals of Today

- Seeking feedback on:
  - “Columns” i.e. issues under consideration
    - ✦ Appropriate?
    - ✦ Anything that should be changed or anything important missing?

Columns represent issues

Baseline issues	Savings Issues (Measure Case)	Program Type Issues	Influence
<p>New technologies in sight that could replace the proposed measure? E.g. HPWH soon to be offsetting NG / Electric Resistance Heat WH ----&gt; take into consideration before</p> <p>Check for Title 20/24 requirements and check for standard practice (ISP). Any new codes that may come in the near term? Is the proposed measure on its way to become</p>	<p>What kind of documentation can be used to verify the correct baseline? E.g. pictures that show baseline conditions to be met?</p> <p>Is this a one-for-one replacement or are there different considerations e.g. 2 baseline / 1 measure case?</p> <p>Savings boundary: e.g. for process measures that involve transportation, make sure to properly draw a boundary that encompasses all of the impact of the measure case,</p>	<p>What are the energy savings? (e.g. no savings, not eligible for EE) If no EE savings, must go to IDSM or other relevant program</p> <p>if energy savings are coming from modeled approach, is it EnergyPlus or DOE2? Current building prototypes on DOE2, if E+, is it possible to map parameters?</p> <p>What program delivery mechanism is the measure proposed for? (e.g. DI vs downstream) What sectors does it apply to? (e.g. Res ----&gt; SF, MF-high rise, MF-low rise,</p> <p>What is the ideal intervention strategy? (e.g. incentives, education, marketing) Can it be realistically carried out in the market? (e.g. if incentives alone are not sufficient or if</p>	<p>What is the MAT? What are possible issues that are related to the proposed MAT? (e.g. baseline, measure case, lifetime, costs)</p> <p>What kind of documentation can be used to show influence?</p>

# Goals of Today

- “Cells” i.e. relative importance of issue for the Measure Type under consideration
  - ❑ Low Importance (for the Measure Type under consideration, not as a whole)
  - ❑ Medium
  - ❑ High
- Framework leads effort on areas of interest when New Measure is brought to the Screening Committee

Rows are Measure Types and cells represent the relative importance of an issue

	Cost-Effectiveness issues		Data Issues		
Procedural measures	If the measure is already existing and updates are needed, what is the likely impact to the TRC? (Important if TRC currently at or near 1.0)	NTG: is there anecdotal evidence that this is going to be a high NTG measure? (e.g. low market adoption, no reason to believe it would change without program intervention)	Is the measure currently incented through the custom program? If yes, what has it been the experience / results under the custom program? Is there available data that can be	If continuous data collection (of any kind, market data, sales data, performance data) is required, is that feasible / sustainable? If not, what is the best available proxy	Does measure (or similar measure) exist in the eTRM? If so, requirements must be the same

Legend:

- Not an issue
- Can be an issue in certain circumstances
- Important issue

# Goals of Today

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- In addition, cells have a short background explaining the reasoning behind the weight (i.e. the low / medium / high importance value)
- Seeking input / clarifying text to inform specifications

Same descriptors as prior slide

	Cost-Effectiveness issues		Data Issues	
	If the measure is already existing and updates are needed, what is the likely impact to the TRC? (important if TRC currently at or near 1.0)	NTG: is there anecdotal evidence that this is going to be a high NTG measure? (e.g. low market adoption, no reason to believe it would change without program intervention vs new technology / procedure that is becoming better known and more accepted in the market)	Is the measure currently incented through the custom program? If yes, what has it been the experience / results under the custom program? Is there available data that can be used to inform the measure development process?	Does measure (or similar measure) exist in the eTRM? If so, requirements must be the same
Procedural measures	1 - Not in eTRM but can be offered under different, dedicated programs	1 - could be applicable	0 - not likely	2 - by definition, data collection is necessary to get ex ante vs ex post data. For savings mechanisms like NMEC 12months post intervention is required. 0 - does not exist

2 - by definition, data collection is necessary to get ex ante vs ex post data. For savings mechanisms like NMEC 12months post intervention is required.

# More on Structure of Framework

- There are 3 macro-level “buckets” of issues
  1. High Level issues: cost-effectiveness, data availability, market size, “fit” with existing EE framework, etc
  2. Parameters issues: parameters necessary to characterize a measure, e.g. baseline, measure case, costs, EUL IDs, etc
  3. Custom issues: many measures start their life as custom (for claims) before moving to other programs, so questions are specific to custom program qualification.
    - ✦ Intuition: if it does not qualify for custom, more difficult for a measure to come to light (one simpler avenue to get to claims and get experience with the programs).
    - ✦ Note: we will not address this third bucket today, but good reference to keep in mind
- Note: due to high volume of issues, we might not be done today