

# New Cal TF Member Orientation



**CALIFORNIA**  
TECHNICAL FORUM

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# Welcome to the Cal TF

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- Cal TF staff is thrilled to welcome you to the Technical Forum (TF)!
- EE industry in CA is at a key inflection point:
  - CPUC has shifted greater responsibility to 3P implementers
  - 60% of EE portfolios delivered by 3Ps by end of 2020
- Cal TF is in a strategic position to positively influence the EE industry



# The California Technical Forum (Cal TF)



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A group of in-state and out-of-state technical experts that work in a **collaborative** and **transparent** way to review new and updated energy efficiency measures and other technical information related to California's integrated demand-side management portfolio.

## ***Vision***

*A respected source of California energy efficiency savings estimates and other technical information related to California's integrated demand-side management (IDSM) portfolio.*

## ***Mission***

*To support the growth and success of energy efficiency and IDSM through a technically **rigorous, independent, transparent** peer review of California's energy efficiency values and other related technical information.*

# The Cal TF A Broad Collaborative

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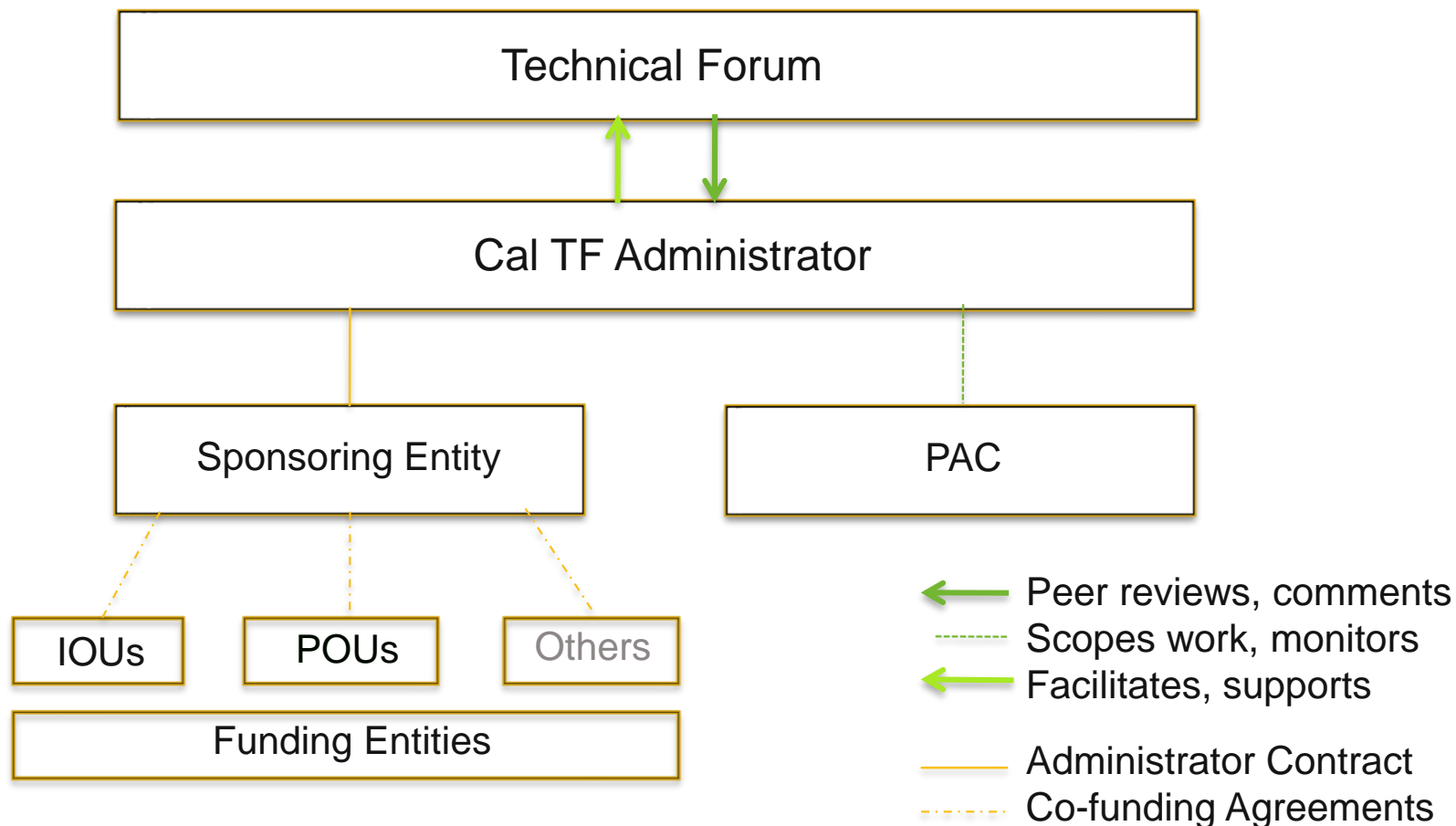
CPUC Public Advocates  
Office



# The Cal TF

## The Collaborative Supports the Technical Experts

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# TF Members

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- Collaborative body of independent technical experts
  - TF members DO NOT represent their organizations' interests
- New members bring the TF membership up to 35
- Relies on consensus-based decision making
  - Non-consensus items noted
- Responsibilities include:
  - Render technical judgments on matters set forth in approved business plan. To date:
    - ✦ Deemed measures
    - ✦ Technical policy issues

# Summary of New Member Qualifications

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- New members are highly qualified with diverse experience evaluating energy & demand impacts of deemed measures and/or custom projects
  - Spanning all building & customer types
- Represent a broad range of organizations, including:
  - Energy consulting/technical engineering firms (10)
  - National lab (NREL) (1)
  - Independent consultant (2)
  - IOU/POU (2)

Candidate Experience	Number
Modeling	13/15
EM&V (traditional)	4/15
NMEC	7/15
Codes & Standards	11/15

**12**

Advanced  
Degrees

**5**

Professional  
Engineers

**17**

Avg. Years'  
Experience

# New TF Members

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- 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



# TF Member Responsibilities

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- Agree to abide by:
  - Code of Independence
  - Code of Conduct
- Attend TF meetings
  - Currently scheduled the fourth Thursday of each month; 10:00 a.m. to 4:00 p.m.
    - ✦ Exceptions: August, November, December
  - Post-2019 meetings may be bi-monthly with more emphasis on subcommittee work
- In-person attendance:
  - California based = 80%
  - Outside California = 50%
- Advance review of meeting materials
- Full & active participation in TF meetings
- Peer review of @least 1 workpaper, TPP, or equivalent
  - NOTE: May modify this requirement
- Participation on @least 1 subcommittee

# Cal TF PAC

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- Policy Advisory Committee (PAC)
  - PAC members DO represent their organizations' interests
- Responsibilities:
  - Sets strategic direction for Cal TF
  - Approves TF Members
  - Approves annual Business Plan & reviews progress (quarterly)
  - Funds Cal TF (IOUs & POUs)
  - Does not participate in the review of technical documents & savings estimates, but reviews & may approve TPPs

PG&E  
SCG  
SDG&E  
LADWP  
SMUD  
Marin Clean Energy

Center for Sustainable Energy  
SCPPA  
NCPA  
NAESCO  
UC Davis  
CEC

LBNL  
CPUC Public Advocates Office  
CEDMC  
NRDC  
CAISO

# Cal TF Administrator & Staff

- TF Lead Facilitator
  - Annette Beitel
- TF Staff
  - Technical: Tim Melloch & Ayad Al-Shaik
    - ✦ Support engineers
  - Policy: Jennifer Holmes & Jennifer Barnes
  - eTRM: Roger Baker
- Responsibilities include:
  - Drafting documents for PAC review
  - Developing (some) technical work product for Cal TF affirmation
    - ✦ Developed
      - Statewide Deemed Measures
      - Technical Position Papers (TPPs)
      - Guidelines and Process Improvement documents e.g. Measure QA/QC Guidelines
  - Meetings: Scheduling, logistics, facilitation, agendas, materials & notes
  - Website: Memorialize Cal TF work (transparency) & provide industry resources

# Reminder: Expectations for Oct 23<sup>rd</sup> Meeting

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- Review meeting materials in advance:
  - eTRM Overview and Future Vision Slide Deck
  - DRAFT 2020 Measure Development Plan & Forms
  - DRAFT 2020 Cal TF Business Plan
  - DRAFT Modeling TPP
- Engage in full & active participation during the meeting
- Prepare & deliver a 60 second introduction covering:
  - Your name, affiliation & years working in EE industry
  - The type of work you are engaged in currently & any highlights from your career
  - Your near-term (1–2 year) vision for the EE industry & how your Cal TF participation supports this vision

# Key Cal TF Milestones

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Created in  
2014 by a  
broad group  
of EE  
stakeholders

2016: “Next  
Steps”  
Memo with  
CPUC Staff

October  
2019: eTRM  
Populated  
with 2020  
Measures;  
Public  
Launch

2015: TPP2  
eTRM  
Proposal

January  
2019: eTRM  
ver. 1.0  
completed

# Current Key Initiatives

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## Measure Consolidation

Aligned over 400 IOU & POU measures statewide

CPUC EAR team provided expedited review & approval over 2018/2019

Paved the way for eTRM

## eTRM

eTRM ver. 1.0 completed January 2019

Populated with CPUC-approved 2020 measures October 2019

Phased launch over 2020

Strive for "Database of Record" starting Jan 1, 2020

## Modeling Charrette & TPP

Charrette drew industry leaders to development recommendations to improve California modeling ecosystem

TPP 11 identifies short, medium, long term recommendations; any implementation will be coordinated with SCE

## New Measure Screening (2020)

Beginning in 2020, new & updated measures will be screened through Cal TF-led process

Will apply to both 3P & Utility requests

# DRAFT 2020 Business Plan

## 1. eTRM – “Best in Class”

- ❑ Administer the eTRM ver. 1.0
- ❑ Implement the eTRM Launch Plan so the eTRM will be the “Database of Record” Effective January 1, 2021

## 2. Cal TF Review of New/Updated Measures

- ❑ Review New & Updated Measures
- ❑ Manage “Statewide Deemed Measure List”
- ❑ Update & Maintain Stage 2 Issues List

# DRAFT 2020 Business Plan

## 3. Help Improve CA Modeling Ecosystem (SCE SW Lead)

- ❑ CA EnergyPlus Building Prototype Model Analysis & Documentation
- ❑ Document Deemed Modeled Measures in a Consistent/Transparent Way

## 4. Help Improve Custom Process

- ❑ Support Custom Process Project Improvement Process
- ❑ Develop Guidelines & Process for Hybrid Measures

## 5. Technology Position Papers (TBD)

- ❑ Reviewing EE Technical Potential Approaches
- ❑ Harmonizing cost methodologies and measure-level load shapes
- ❑ PAC Test vs. TRC in screening and valuing measures.



# Closing

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- Thank you again for volunteering your time as a Cal TF Member!
- Cal TF's role & influence will continue to evolve & grow in 2020 & beyond
- Your contribution as TF members will help shape the California clean energy industry to be more **technically robust, transparent & collaborative**