

Cal TF Meeting

Draft 2021 Business Plan



CALIFORNIA
TECHNICAL FORUM

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CAL TF STAFF
DECEMBER 2020

Draft

2021 Business Plan Overview

2021 Business Plan:

- Implement eTRM
- Manage existing measures
- Manage new measures
- POU custom measures
- TPPs (*remove for 2021*)
- Manage Cal TF / PAC

*More than half
the budget*

Typical
Cal TF
Implementation
Budget Goals

Administer Software Development

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1. Implement CPUC-mandated eTRM ver. 2.0 enhancements so eTRM can be the Data Source of Record
 - eTRM ver. 2.1, Phase 1 *Conditional Data Source of Record* effective first week in January 2021.
 - eTRM will meet requirements for eTRM ver. 2.0, Phase 2 but needs to be adopted as the *Data Source of Record* through next year's DEER Resolution by 1/1/2022.
 - Through E-5082, Staff reserved right to change enhancement list.
 - ✦ *How to stay informed...<http://www.caltf.org/etrm-version-2>*

Implementation of eTRM in 2021

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2. Ongoing Implementation of the eTRM

- ❑ Update Transition and Launch Plan (*from 2020 BP*)
- ❑ Develop Governance Plan
- ❑ 6 eTRM training sessions
 - ✦ Trainings are intended to be focused on user types rather than specific groups.
 - ✦ *We need to be very strategic about training so please reach out to me with your thoughts on how to reach the greatest number of people.*
- ❑ User support will be available but *limited*
 - ✦ *We have a contact email box that you can send questions to.*
 - ✦ *eTRM@FutEE.email*

Existing Measure Management

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3. Existing Measure Management

□ Existing Measure Updates

- ✦ Goal is to create solid update process
 - Establish tracking and reporting metrics
- ✦ In the first half of the year, we won't have several important enhancements to automate the workflow.

□ Adding Enhancements into Existing Measures

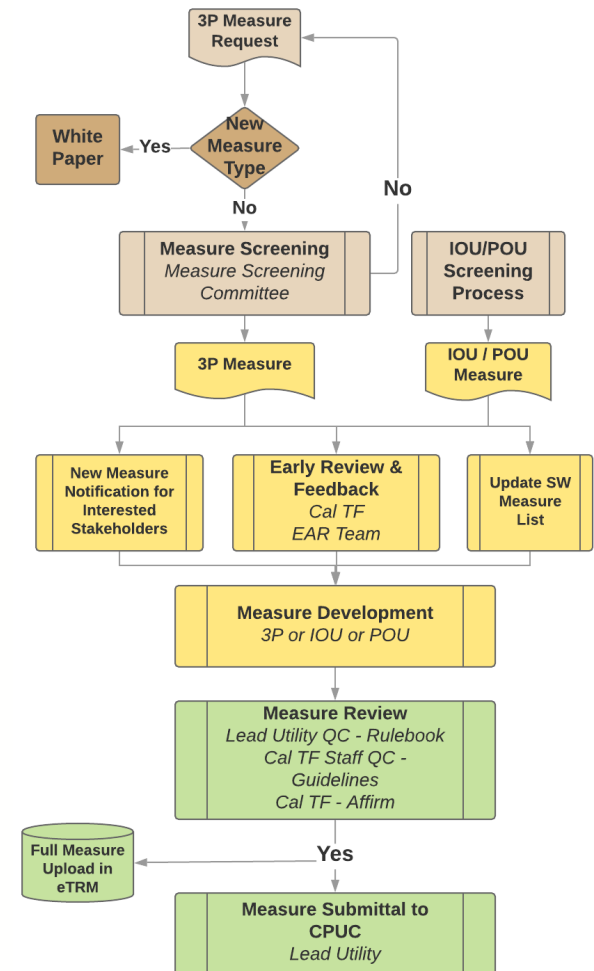
- ✦ Depending upon budgets, IOUs may need to pick up this work entirely
- ✦ Many new enhancements in 2021:
 - *User Experience*: Ordering of tables in the most logical way
 - Many other pending enhancements fall into the category of improving user experience
 - *Resolution*: Adding data for new Spec Fields / Adding Load Shape as they are developed
 - *POUs*: Uploading CO₂ tables for GHG calculations
 - *Work planning*: Ability to add references to rows of tables

New Measure Management

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4. New Measure Process

- ❑ Establish tracking and reporting metrics
- ❑ New measures / measure offerings can be supported through the New Measure Process
- ❑ New measure type development
 - ✦ Goal of defining new the types of energy efficiency measures that can be used within portfolios
- ❑ POU subcommittee convened in order to:
 - ✦ Discuss and socialize details of POU-only measures
 - ✦ Understand POU-specific use-cases for the eTRM
 - ✦ Facilitate outreach and education on the eTRM to POUUs



POU Custom Measure Process

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5. POU Semi-Custom and Custom Measures

- First, we are starting with the LADWP process which is fully developed and quite robust
 - ✦ Evaluating how the current eTRM resources can interlace and streamline this process - while making it more robust
- Second, we will review all of the POU TRM tools
 - ✦ Document the enhancements needed to make these tools fully functional in the eTRM
- Third, develop these tools in custom measures
 - ✦ We won't upload these measures yet.

Technical Position Papers

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6. Technical Position Papers

- None for 2021

Manage Cal TF and Cal TF PAC

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7. Manage Cal TF and Cal TF PAC
 - 4 Cal TF Meetings, *significantly reduced*
 - 4 Additional Measure Review Meetings
 - 3 short PAC Meetings + ad hoc as needed
 - “Value of Cal TF” survey

Questions...

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Next Week – December Cal TF Meeting

December 17th, Thursday

Morning: 10:00 – 11:30am

- White paper: Measure Classification Final
 - Request affirmation from Cal TF members.
- White paper: POU Custom Process Draft
 - Request feedback from Cal TF members.

Afternoon: 1:00 – 2:30pm

- 2020 Business Plan Review
 - Describe the accomplishments and progress made this year.
 - *It was another great year!*
- 2021 Business Plan Final
 - Update the team on the final plan.
- eTRM v2.x Update – If there is time...