Existing Measures Communication Plan

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BP Metric 3C. Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates

- Problem statement
  - Stakeholders see changes after they have been made
- Goals/objectives
  - JZ: Make the change very visible, to help in assessing downstream implications
  - Make clear different types of changes; high vs low impact changes
  - LC: help communicate what changes are pending/planned in the future to help stakeholders get ahead of the change
  - Provide information in the different ways stakeholders want to understand
- Scope of the initiative
- Expected benefits to stakeholders
- Potential obstacles and preliminary solutions
  - JZ: Look at best practices for versioning/version control; tie versioning to the type of change (e.g., corrections, single value change, savings change)
  - AS: Wondering if the subscription feature in eTRM can provide summary notifications of measure package changes or measures that need upcoming changes
  - LC: good to have an active way to see the changes; see all changes in one place, filters by type of change, etc.
  - SL: PG&E spreadsheet showing percent changes is helpful, other manipulations (e.g., impacts of specific permutations) could be more helpful to understand changes
  - AS: can we create these reports on eTRM stats and integrate with the subscription to notify stakeholders to those reports
  - ER: want to be able to look at the CE of MPs/permutations
- Schedule considerations
  - IOUs file 24-27 BPs; need to file true-up AL with updated budgets/forecasts (including some new measures); will need to work with 3Ps to get their forecasts
- Interested/required stakeholders

Understanding Measure Package Changes

- Background
- Tools Available Today:
  - ○ Sunset Measures
  - ○ Measure Package Review Summary
  - ○ Measure Reports
  - ○ eTRM Stats – Version Comparison
  - ○ Downloading Permutation Data
  - ○ APIs
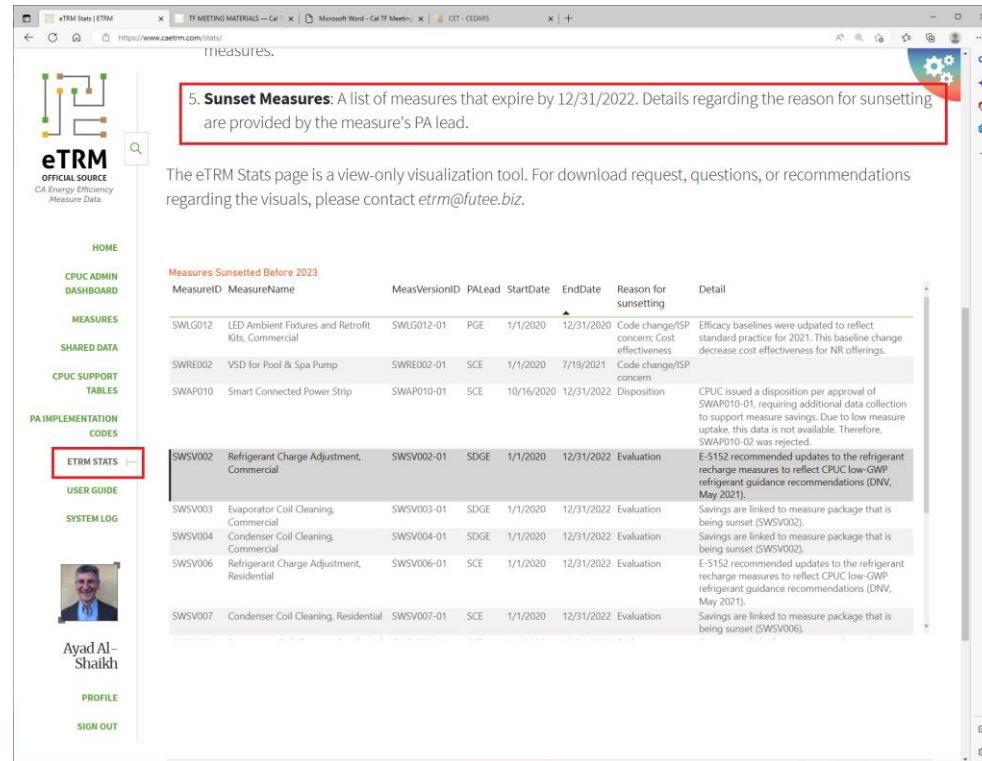
- Questions to best understand the need

High Level

Detail

Low Level

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Sunset Measure List

- **Question**: *What measures are or will be expiring?*

- Accessible live through "eTRM Stats" page.
- Fully automated/updated report.
  - ❑ Triggered by End Date with no new Version published.
- Includes brief reason for sunsetting.

Measure Package Review Summary

- **Question**: *How can you track what measures are within the approval process?*

- Accessible live through Measure Reports page.

- Fully automated/updated report.
  - ❑ Showing "Under Review", "Approved", and "Rejected"
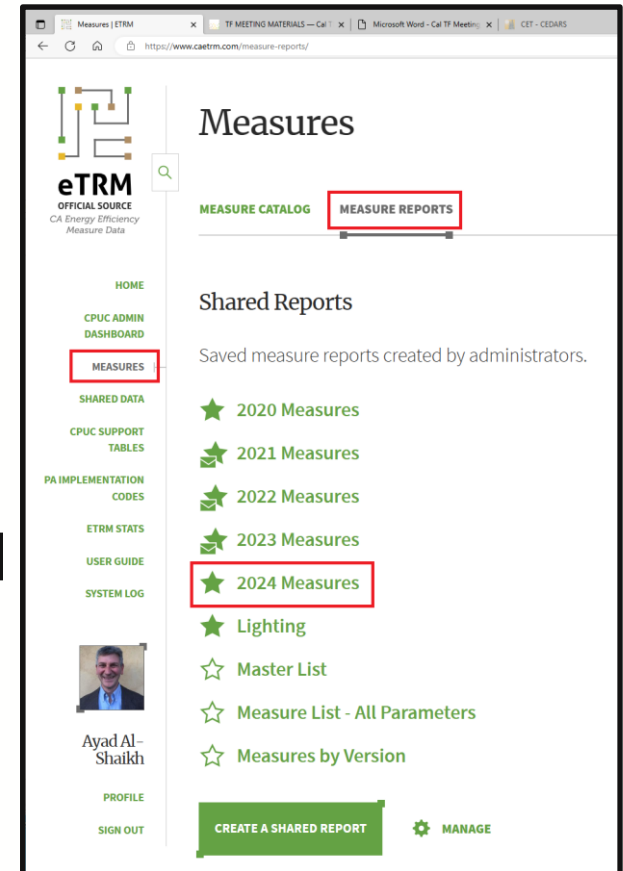
- Date range can be adjusted

Measure Reports

- **Question**: *What has changed at a high level from one Version to the next?*

- Accessible live through "Measure Reports" or can be scheduled (monthly / quarterly email).

- Automated/updated reports that include "Change Description" following the same format.

- Includes administerial and automated entries.

- Create your own reports from measure-level data fields.

Measure Version Comparison

- **Question**: *How can I understand detailed changes between two versions?*

View average of impacts in original value, %Δ, or both

| Value | Percentage Difference | **Both** |

Compare at the offering level or measure level

| Compare by Measure |

Average and Percentage Difference of Average Impacts

OfferingID	SWCR007-02	SWCR007-03
A		
UnitkW1stBaseline	0.05	0.02
		-59.91%
UnitkWh1stBaseline	928.31	848.50
		-8.60%
UnitTherm1stBaseline	0.44	0.25
		-43.65%
UnitMeaCost1stBaseline	217.80	241.89
		11.06%
Life1stBaseline	7.00	5.00
		-28.57%
UnitkW2ndBaseline	0.00	0.00

Description and Parameters

OfferingID	SWCR007-02	SWCR007-03
A		
OfferingDesc	Control SCT to ambient +12 deg F TD, 70 deg F min, backflood setpoint of 68 deg F	Control SCT to ambient +12 deg F TD, 70 deg F min, backflood setpoint of 68 deg F
Version	ExAnte2022	ExAnte2023
# of MeasDetailID	800	768
# of MeasAppType	1	1
# of BldgType	25	24
# of BldgLoc	16	16
# of BldgVint	1	1
ETP_Flag		
E3MeaElecEndUseShape	DEER:HVAC_Chillers	DEER:HVAC_Chillers
NormUnit	Cap-Tons	Cap-Tons

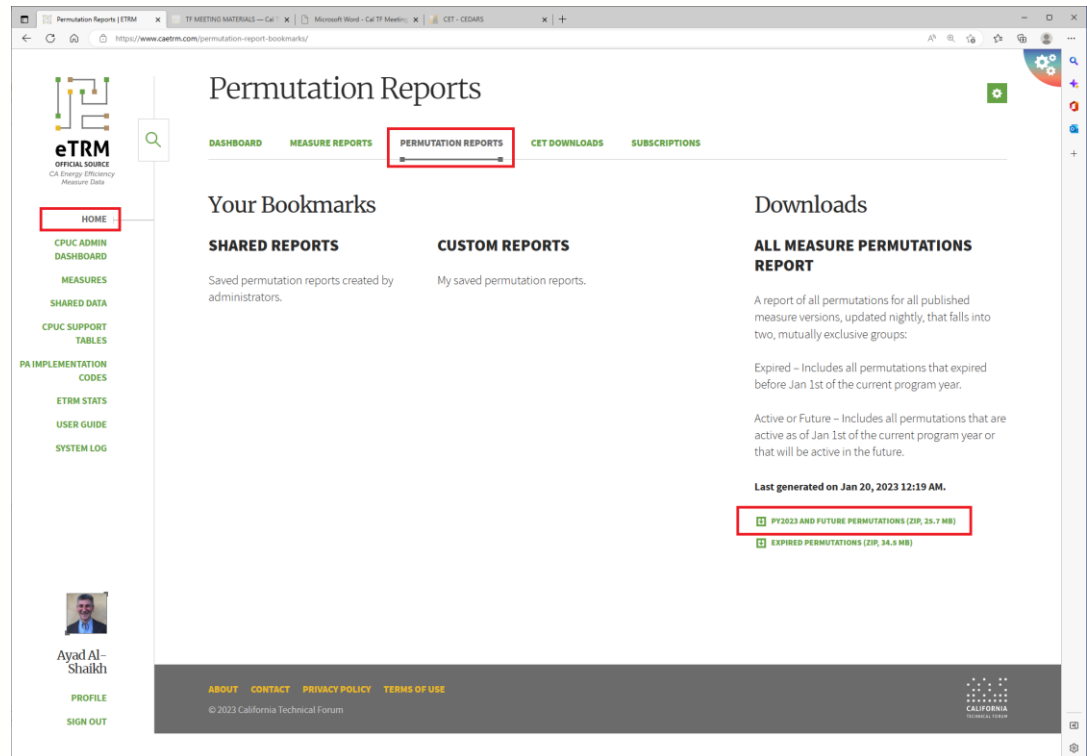Compare between two versions

Understand what make versions different
Understand if it is legitimate to compare

Downloading Permutation Data

- **Question**: *How do I create custom analysis to compare savings?*

- Statewide:
  - ❑ "Permutation Report" is sync'd nightly with Measure Packages.

- PA Specific:
  - ❑ "PA Implementation Codes" provides all permutation that have been assigned by PA.
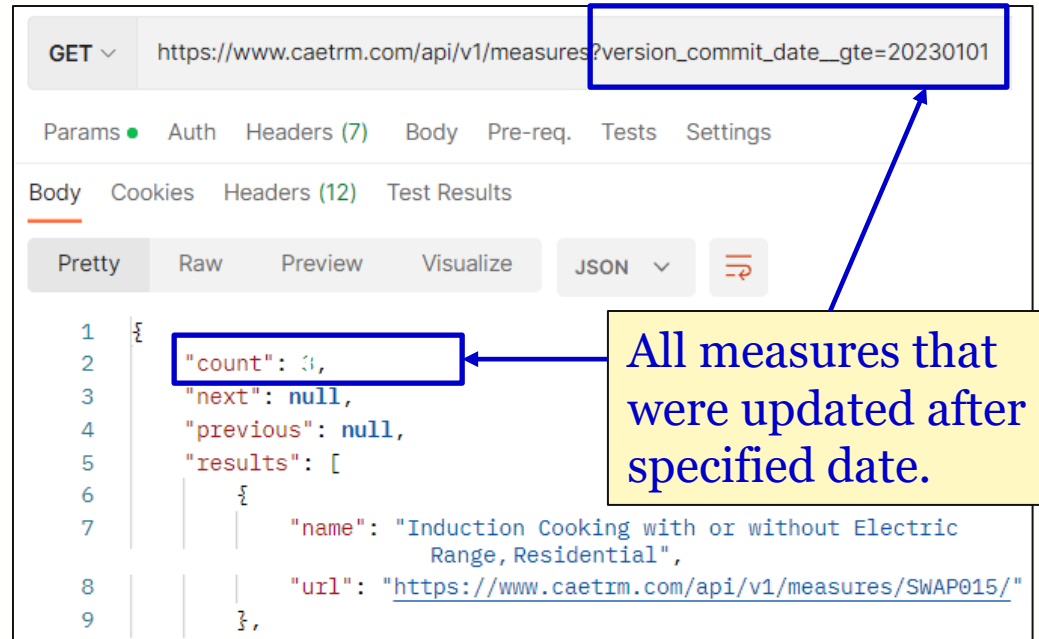
APIs (Application Programming Interface)

- **Question**: *How can I keep my company's system in sync with published data through automation?*

- APIs can be used to filter for only what changed since your last request for data.

- APIs can request either measure or permutation level data.

All measures that were updated after specified date.

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

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- Which groups need to be informed:
  - IOUs / POUs
  - CCAs / RENs
  - Implementers / CEDMC
  - CPUC / Evaluators
  - Who else?

- Is it better to focus data by job function:
  - Program manager
  - Engineer
  - Customer
  - Other categories?

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- What is the best way to engage with each group to understand stakeholder needs and preferences:
  - ○ Focus group meetings
  - ○ Survey
  - ○ Regular meetings
  - ○ Other?

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What Data

How/When Receive

How Comment

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- What data is more important for you to track?
  - Measure related:
    - New measures
    - Sunsetting measures
    - Changes to existing measures
    - Changes to groups of measures
    - Policy related issues
  - *Differentiate impactful changes*
  - Measure inputs (Shared Objects / DEER changes)
  - Other data?

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What Data

How/When Receive

How Comment

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- How/when do you want to receive information?
  - Self-serve
    - Live reports
    - Dashboard on eTRM
    - Cal TF website
  - Delivered to you
    - Email (one or groups of issues)
    - Monthly / Weekly / Daily report
  - Other?

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What Data

How/When Receive

How Comment

- How would you want to provide feedback for common requests:
  - Recommend changes to current measure package version
  - Recommend changes to future measure package version
  - Comment on Validation Data lists
  - General questions

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