

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

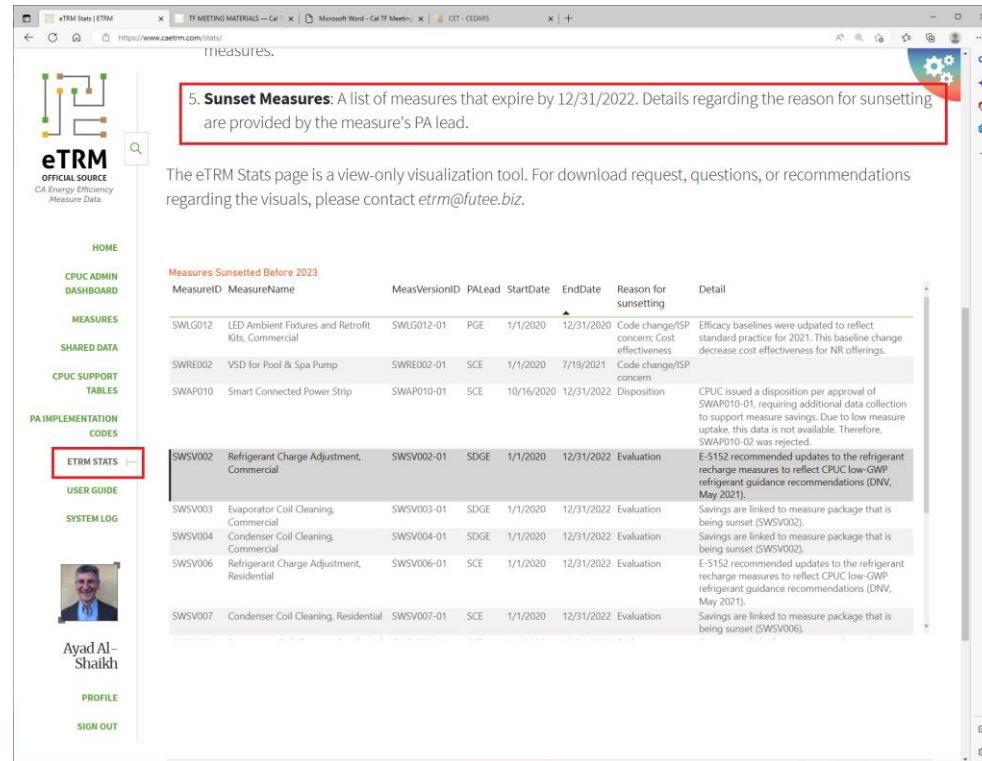


Low Level

Sunset Measure List

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- **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.



5. **Sunset Measures:** A list of measures that expire by 12/31/2022. Details regarding the reason for sunsetting are provided by the measure's PA lead.

The eTRM Stats page is a view-only visualization tool. For download request, questions, or recommendations regarding the visuals, please contact etrm@futee.biz.

MeasureID	MeasureName	MeasVersionID	PALead	StartDate	EndDate	Reason for sunsetting	Detail
SWLG012	LED Ambient Fixtures and Retrofit Kits, Commercial	SWLG012-01	PGE	1/1/2020	12/31/2020	Code change/ISP concern; Cost effectiveness	Efficacy baselines were updated to reflect standard practice for 2021. This baseline change decrease cost effectiveness for NR offerings.
SWRE002	VSD for Pool & Spa Pump	SWRE002-01	SCE	1/1/2020	7/19/2021	Code change/ISP concern	
SWAP010	Smart Connected Power Strip	SWAP010-01	SCE	10/16/2020	12/31/2022	Disposition	CPUC issued a disposition per approval of SWAP010-01, requiring additional data collection to support measure savings. Due to low measure uptake, this data is not available. Therefore, SWAP010-02 was rejected.
SWSV002	Refrigerant Charge Adjustment, Commercial	SWSV002-01	SDGE	1/1/2020	12/31/2022	Evaluation	E-5152 recommended updates to the refrigerant recharge measures to reflect CPUC low-GWP refrigerant guidance recommendations (DNN, May 2021).
SWSV003	Evaporator Coil Cleaning, Commercial	SWSV003-01	SDGE	1/1/2020	12/31/2022	Evaluation	Savings are linked to measure package that is being sunset (SWSV002).
SWSV004	Condenser Coil Cleaning, Commercial	SWSV004-01	SDGE	1/1/2020	12/31/2022	Evaluation	Savings are linked to measure package that is being sunset (SWSV002).
SWSV006	Refrigerant Charge Adjustment, Residential	SWSV006-01	SCE	1/1/2020	12/31/2022	Evaluation	E-5152 recommended updates to the refrigerant recharge measures to reflect CPUC low-GWP refrigerant guidance recommendations (DNN, May 2021).
SWSV007	Condenser Coil Cleaning, Residential	SWSV007-01	SCE	1/1/2020	12/31/2022	Evaluation	Savings are linked to measure package that is being sunset (SWSV006).

Measure Package Review Summary

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- **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



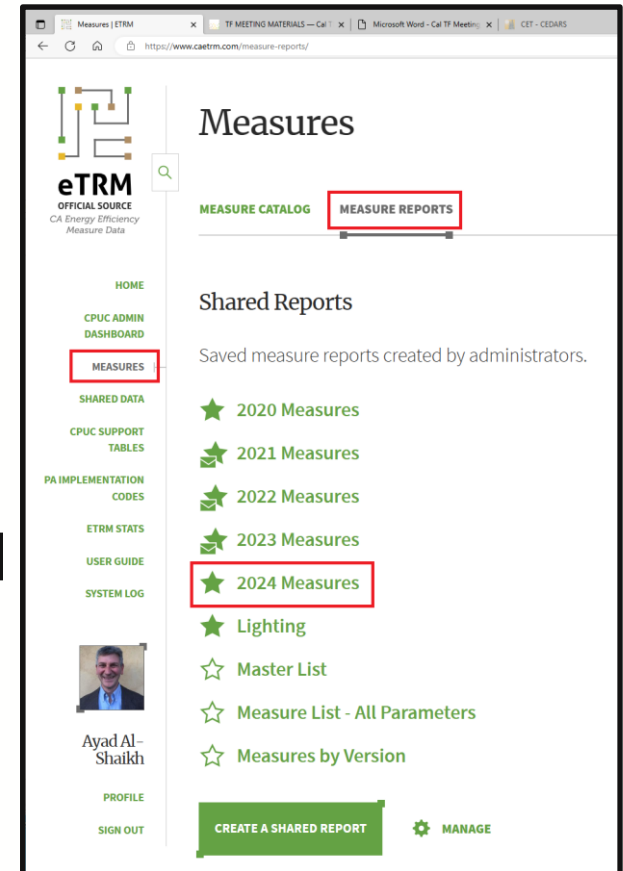
The screenshot shows a web browser displaying the 'Measure Package Review Summary Report' page. The page includes a navigation bar with 'EXIT ADVANCED FULLSCREEN VIEW' and a 'DOWNLOAD CSV' button. Below the title, there are pagination controls showing '1-11 of 11 items', 'Starting row 1', and 'Rows per page 25'. An 'Add a filter' button is also present. The main content is a table with the following columns: REVIEW STATUS, PA LEAD, MEASURE VERSION, EFFECTIVE DATE, DATE OF MEASURE PACKAGE PLAN / REQUEST FOR EARLY CPUC FEEDBACK LOG ENTRY, and DATE SUBMITTED TO CPUC. The table lists 11 measures, with the first 10 in 'Under Review' status and the last two in 'Approved' status.

REVIEW STATUS	PA LEAD	MEASURE VERSION	EFFECTIVE DATE	DATE OF MEASURE PACKAGE PLAN / REQUEST FOR EARLY CPUC FEEDBACK LOG ENTRY	DATE SUBMITTED TO CPUC
Under Review	MCE	Deeply Buried Ducts, Residential (SWBE010-01-4)	Jan 01, 2023		Dec 01, 2022 08:55 AM
Under Review	SCE	Business Energy Reports (SWWB007-01-15)	Nov 01, 2022		Jul 14, 2022 10:20 AM
Under Review	SCG	Convection Oven, Commercial (SWFS001-03-draft)	Jan 12, 2023		Sep 01, 2022 03:03 PM
Under Review	SCG	Heat Recovery Ventilation, Residential (SWHC054-01-3)	Sep 01, 2022		Jul 18, 2022 09:01 AM
Under Review	SCG	Solar Thermal Water Heating System, Commercial and Multifamily (SWWH034-02-2)	Jan 01, 2023		Nov 21, 2022 08:53 AM
Under Review	SCG	Hot Food Holding Bins, Electric, Commercial (SWFS024-01-draft)	Jan 01, 2023		Dec 01, 2022 09:22 AM
Under Review	SCG	Space Heating Gas Absorption Heat Pump, Multifamily (SWHC057-01-5)	Jan 01, 2023		Dec 13, 2022 08:59 AM
Under Review	SDGE	UL Type B LED Screw-in Lamp HID Retrofits (SWLG020-01-3)	Sep 01, 2022		Jul 22, 2022 11:32 AM
Under Review	SDGE	SEER Rated AC and HP HVAC Equipment, Residential (SWHC049-03-5)	Jan 01, 2023		Jan 13, 2023 09:44 AM
Approved	SDGE	Package Terminal Air Conditioner or Heat Pump, Under 24 kBtu/hr (SWHC027-03)	Jan 01, 2024		Nov 16, 2022 04:08 PM
Approved	SDGE	Air-Cooled Chiller (SWHC020-03)	Jan 01, 2023		Nov 16, 2022 12:39 PM

Measure Reports

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- **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 administrative and automated entries.
- Create your own reports from measure-level data fields.



The screenshot shows the eTRM Measures Reports interface. The page title is "Measures". The navigation menu includes "MEASURES" (highlighted with a red box), "MEASURE CATALOG", and "MEASURE REPORTS" (highlighted with a red box). The "Shared Reports" section lists "2020 Measures", "2021 Measures", "2022 Measures", "2023 Measures", and "2024 Measures" (highlighted with a red box). Other reports include "Lighting", "Master List", "Measure List - All Parameters", and "Measures by Version". The user profile is "Ayad Al-Shaikh".

Measure Version Comparison

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- 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 by Measure

Compare at the offering level or measure level

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

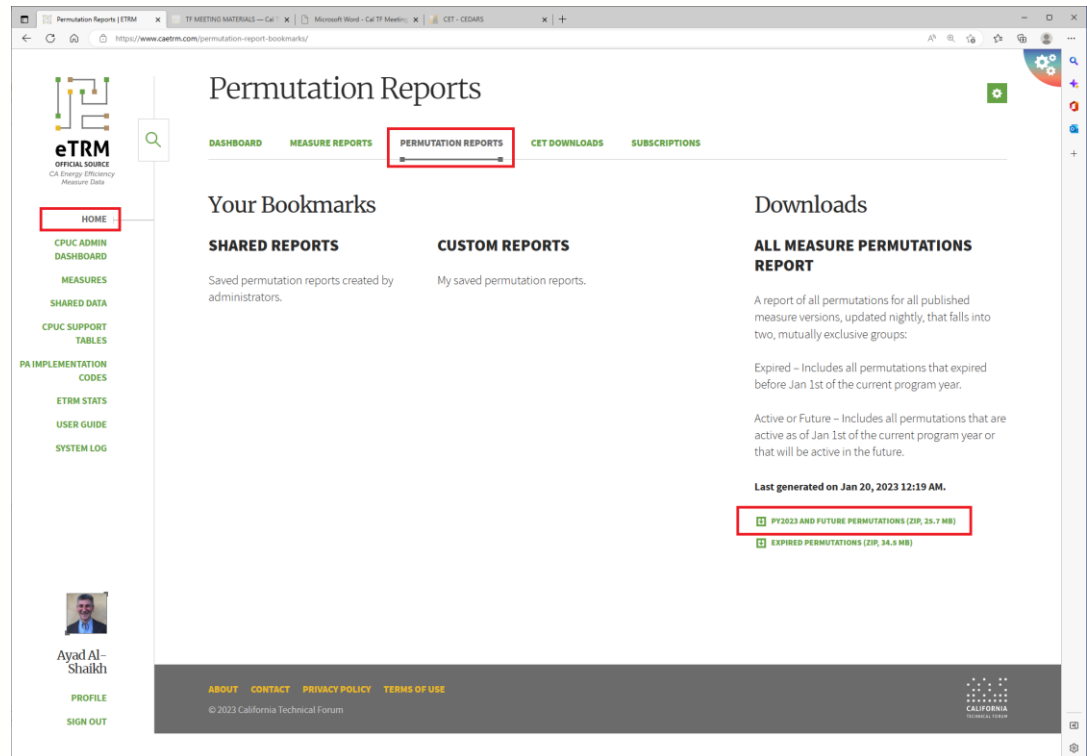
Compare between two versions

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

Downloading Permutation Data

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- **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.

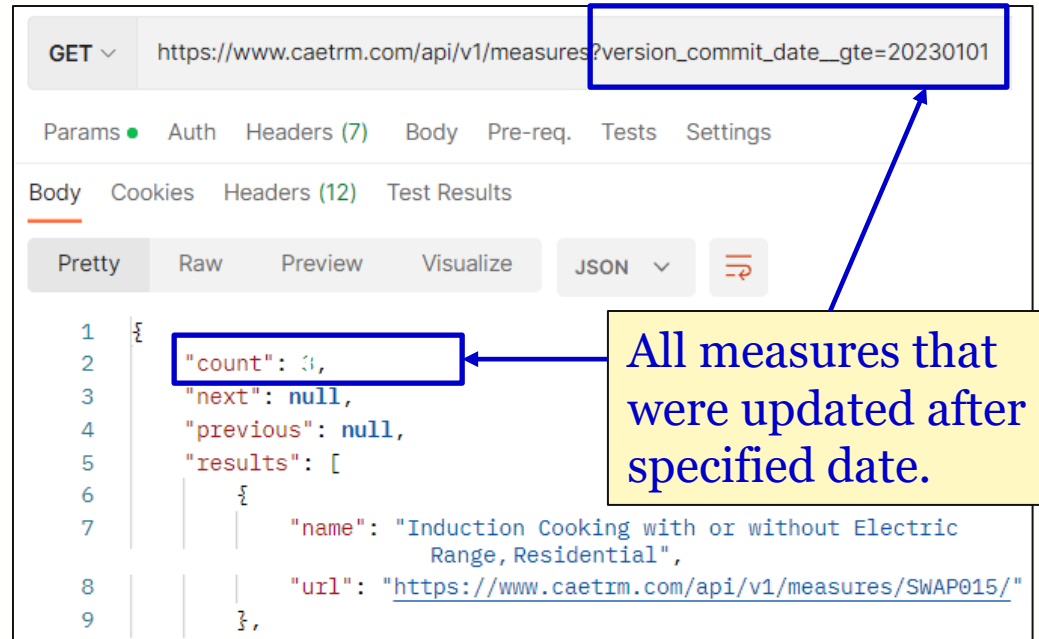


The screenshot shows the 'Permutation Reports' page in the eTRM system. The page has a navigation menu on the left with items like 'HOME', 'CPUC ADMIN DASHBOARD', 'MEASURES', 'SHARED DATA', 'CPUC SUPPORT TABLES', 'PA IMPLEMENTATION CODES', 'ETRM STATS', 'USER GUIDE', and 'SYSTEM LOG'. The main content area is titled 'Permutation Reports' and includes a search bar, a navigation bar with 'DASHBOARD', 'MEASURE REPORTS', 'PERMUTATION REPORTS' (highlighted with a red box), 'CET DOWNLOADS', and 'SUBSCRIPTIONS'. Below this, there are sections for 'Your Bookmarks' (with 'SHARED REPORTS' and 'CUSTOM REPORTS'), and 'Downloads' (with 'ALL MEASURE PERMUTATIONS REPORT'). The 'Downloads' section lists two reports: 'FY2023 AND FUTURE PERMUTATIONS (ZIP, 25.7 MB)' and 'EXPIRED PERMUTATIONS (ZIP, 34.3 MB)', both highlighted with red boxes. The footer contains 'ABOUT', 'CONTACT', 'PRIVACY POLICY', 'TERMS OF USE', and '© 2023 California Technical Forum'.

APIs (Application Programming Interface)

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- **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.



GET `https://www.caetrm.com/api/v1/measures?version_commit_date_gte=20230101`

Params • Auth Headers (7) Body Pre-req. Tests Settings

Body Cookies Headers (12) Test Results

Pretty Raw Preview Visualize JSON ↕

```
1 {
2   "count": 3,
3   "next": null,
4   "previous": null,
5   "results": [
6     {
7       "name": "Induction Cooking with or without Electric
8         Range, Residential",
9       "url": "https://www.caetrm.com/api/v1/measures/SWAP015/"
    }
  ],
}
```

All measures that were updated after specified date.

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- Which groups need to be informed:
 - IOUs / POUUs
 - 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 Data

How/When Receive

How Comment

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

Stakeholder Communication Plan

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What Data

How/When Receive

How Comment

- 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?

Stakeholder Communication Plan

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What Data

How/When Receive

How Comment

- 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?

Stakeholder Communication Plan

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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