



Meeting Notes

California Technical Forum (Cal TF) Meeting

December 17, 2020

Location: Teleconference Only

10:00 a.m. – 11:30 a.m.

1:00 p.m. – 2:00 p.m.

Time	Agenda Item	Discussion Leader(s)
10:00 - 10:15	Opening	Ayad Al-Shaikh
10:15 – 11:00	Measure Classification White Paper ACT: <ul style="list-style-type: none"> Affirmation 	Stefano Galiasso
11:00 - 11:30	POU Custom Process White Paper ACT: <ul style="list-style-type: none"> Feedback and Comments 	Ayad Al-Shaikh

11:30am – 1:00pm Break

Time	Agenda Item	Discussion Leader(s)
1:00 – 1:40	2020 Business Plan Review <ul style="list-style-type: none"> Review with Cal TF in September Changes due to budget shift Big accomplishments for 2020! ACT: <ul style="list-style-type: none"> Feedback and comments 	Ayad Al-Shaikh
1:40 – 1:50	2021 Business Plan Update <ul style="list-style-type: none"> <i>Affirmed by the PAC!</i> 	Ayad Al-Shaikh



	ACT: <ul style="list-style-type: none"> • Update 	
1:50 - 2:00	Closing - eTRM Update	Ayad Al-Shaikh

Meeting Materials

- **Meeting Decks**
 - Measure Classification White Paper
 - 2020 Cal TF Business Plan Goal Review
 - 2021 Cal TF Business Plan Overview
- **For Information**
 - Final Measure Classification White Paper
 - Draft POU Custom Process White Paper

Meeting Attendees

	<i>In-Person</i>	<i>Via Telephone</i>
<i>Cal TF Staff</i>		Ayad Al-Shaikh Jennifer Holmes Roger Baker Stefano Galiasso Tomas Torres-Garcia Chau Nguyen
<i>Cal TF Members</i>		Abhijeet Pande Alfredo Gutierrez Armen Saiyan Chan Paek Charles Ehrlich Christopher Rogers Dave Hanna Eric Noller Gary Fernstrom George Beeler Jay Madden Jeff Seto Lisa Gartland Martin Vu Mike Casey Sepi Shahinfard Spencer Lipp Steven Long



	<i>In-Person</i>	<i>Via Telephone</i>
		Tom Eckhart Vrushali Mendon
<i>Non-Cal TF Members</i>		CPUC Amy Reardon / CPUC CPUC Consultant Bing Tso / SBW Rachel V. Murray / DNVGL Sue Haselhorst / Energy & Resource Solutions IOU Anders Danryd / SCG Henry Liu / PG&E POU Jeremiah Valera / LADWP Implementer / 3P / Consultant Bryan Boyce / Energy Solution Jay Luboff / Jay Luboff Consulting Jeremy Sasse / RMS Energy Consulting Keith Valenzuela (Contractor) Other +13129529940 +14084066689 +15303047767



Meeting Notes

I. Measure Classification White Paper

Presenter: Stefano Galiasso

Materials: EE Measure Classification Presentation

- Gary Fernstrom: At the bottom, what is VC?
 - Stefano Galiasso: VC stands for venture capitalists, firms that are investing in new technology developers.

Determining the pathway: Decision Tree:

- Abhijeet Pande: “Is it a high-volume technology?” pathway, both yes and no lead to the same result.
 - Stefano Galiasso: It does lead to the same result, but there is a difference. If it is a high-volume technology (“Yes” = certain amount of volume or it is growing quickly in the market, coming from a new technology with reliable estimates), the developer takes the path to a deemed workpaper submission. In this case when we receive the request, this becomes high priority since savings can be brought to the program immediately. There may be backlog in the review committee to review all the measure proposals; the different pathways allow us to prioritize.
- Abhijeet Pande: How to distinguish between new measure versus new technology?
 - Stefano Galiasso: One of the questions in the decision tree (in the center) is if measure is a new technology (< X years old). The number of years is arbitrary right now, but we can further clarify the definition. The distinction is the number of years that the technology has been in the market. For example, one distinction is if the technology is in the market for a long time, then it is probably a new measure and not a new technology.
 - Abhijeet Pande: The categorization certainly can be improved. Note that the word technology may imply a widget, but sometimes, it could be a non-widget.
 - Stefano Galiasso: That is a good point. One of the examples would be a software. We will take language into consideration.



Determining the pathway: Example 2

- Abhijeet Pande: Pathway that leads to ET or custom or submit a deemed measure proposal. Is the applicant choosing the next step?
 - Stefano Galiasso: Yes, we will provide them all the information regarding each program so that they can understand the differences, advantages, and trade-offs. For example, custom does not need a WP, but has more difficult implementation issues. For deemed, you need to prove the impact. We will provide all this information (outlined in the white paper) and let the developers decide the best fit.

II. POU Custom Process White Paper

Presenter: Ayad Al-Shaikh

Materials: POU Custom Process in eTRM Presentation & POU Custom Process in eTRM Memo

LADWP Custom Performance Program (CPP) Process

- Gary Fernstrom: What is RCx?
 - Ayad Al-Shaikh: Retro-commissioning.
- Armen Saiyan: (comment on the layered review). The example of certain custom express measures may exceed the threshold for deemed, they get pushed over as calculated measure. Any custom express can become calculated if it exceeds the threshold.

Opportunity with the eTRM

- Gary Fernstrom: I recommend that we substitute the word “enforce” with the word “achieve” [standard measure identification nomenclature]. I do not think the Cal TF is in the enforcement business, but we are in the achievement business.
- Armen Saiyan: There are a lot of implications, might need some time to think. Some examples can help structure a better engine, provide use case, or understand how it will work.
 - Ayad Al-Shaikh: Maybe this is the right forum. To Arman’s point, there are a lot of implications with the opportunities I presented. There is a POU subcommittee. The original purpose is to discuss their deemed measures and moving those measures into the eTRM. However, part of convening it would be to talk through the semi-deem measures. Let me know if you want to participate. We will start early 2021.



III. 2020 Business Plan Review

Presenter: Ayad Al-Shaikh

Materials: 2020 Business Plan Review Presentation

What is not done due to lack of budget (GHG bullet point)

- George Beeler: For the Greenhouse Gas work, there will not be a committee, but can we comment on what you did?
 - Ayad Al-Shaikh: Roger already put together a framework that may still need to be updated. We will want more feedback. I know we want to circle back with the CEC; they did a lot of work in this area. If anyone wants to comment on the greenhouse gas memo, please let me know.
 - Gary Fernstrom: Is the greenhouse gas memo going to include some estimate of how it may/may not change cost effectiveness, or will it simply look at the emissions? Since we are moving to an electric economy, are we valuing the balance between the customer rate and the environmental benefit?
 - Ayad Al-Shaikh: We are planning use the CO2 emission tables that are also used by CAISO (NP15 and SP15) that are used in the avoided cost calculator. My understanding is that those tables capture the generation on the margin. It seems to be the right data to use in this application.
 - Gary Fernstrom: Is it time or seasonal dependent?
 - Ayad Al-Shaikh: These are 8760 curves.
 - Roger Baker: We will not monetize it in the eTRM, we will use what is in the avoided cost calculator.
 - Ayad Al-Shaikh: We do want to have the discussion with a larger stakeholder group so that down the path, other groups can use the data as the common approach.
 - Gary Fernstrom: My concern is having confidence that the proper approach is being used. I believed it is with what you showed me.

- Martin Vu (chat): Will you have examples of how the GHG emission calculation is performed?
 - Roger Baker: The July 23 Cal TF presentation lays out the calculation approach that we are currently considering.

- Martin Vu (chat): Will data that exists from other jurisdictions be considered if California data does not exist? To help develop new measures that is.



- *We do need to complete a significant amount of work still on load shapes; these are starting to be developed by DNVGL. Others are currently using the best available data. However, we agree that this should be revisited as we are uploading load shapes into the eTRM. (answered after the meeting)*

IV. 2021 Business Plan Update

Presenter: Ayad Al-Shaikh

Materials: CalTF Update - 2021 BP Overview r2

Implementation of eTRM in 2021

- Henry Liu: We already have recorded trainings. Having established materials would certainly help with the smaller or less frequent trainings.
 - Ayad Al-Shaikh: We have a user manual. A lot of the other trainings may range from 30 min to 2 hours long. The user manual consists of 3 minutes segments, which will help with the process. If there are other snippets of videos that people find valuable, please reach out to let us know.

POU Custom Measure Process

- Armen Saiyan: Is there a detailed plan to bring POU measures to the eTRM?
 - Ayad Al-Shaikh: We are trying to pursue it through SCPPA/NCPA. There are 2 parts to the problem: effort to update the data and effort to upload them to the eTRM. We created the scope for it, but not the funding for it yet.
 - Armen Saiyan: I could follow up with SCPPA.
 - Ayad Al-Shaikh: As a statewide tool, there should not be a reason why people must go through multiple places to get information. One benefit is that the eTRM has a lot more measures in addition to the POU measures. It is a balance. There are measures that may not be cost effective for IOUs to pull in, but POU's may still want to offer these to their customers.

Technical Position Papers

- Gary Fernstrom: Are the 4 additional measure review meetings open to the whole Cal TF group or subcommittee?
 - Ayad Al-Shaikh: We want it to be the whole group. They will probably take place on the 4th Thursday of the month, similar to CalTF meetings; they are meant to be short meetings that just focuses on measure review. One of the things we departed from, last year, was getting the Cal TF affirmation for the new measures. Moving forward, the focus is to get the affirmation or feedback as we move measures into the eTRM.



- Armen Saiyan: These meetings do not include the subcommittee meetings correct?
- Ayad Al-Shaikh: Correct.