New Measure Process Review

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TECHNICAL FORUM

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Agenda

- Process review (10 min)

- Forms

  - Measure Submission Form, Att C (30 min)

  - Measure Screening Form, Att D (5 min)

  - Measure Development/Update Plan, Att E (5 min)
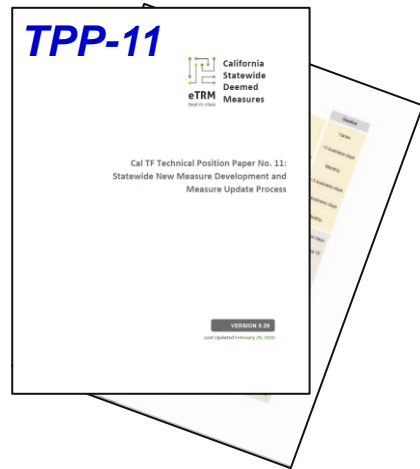
- Website & Resources (20 min)

New Measure Process
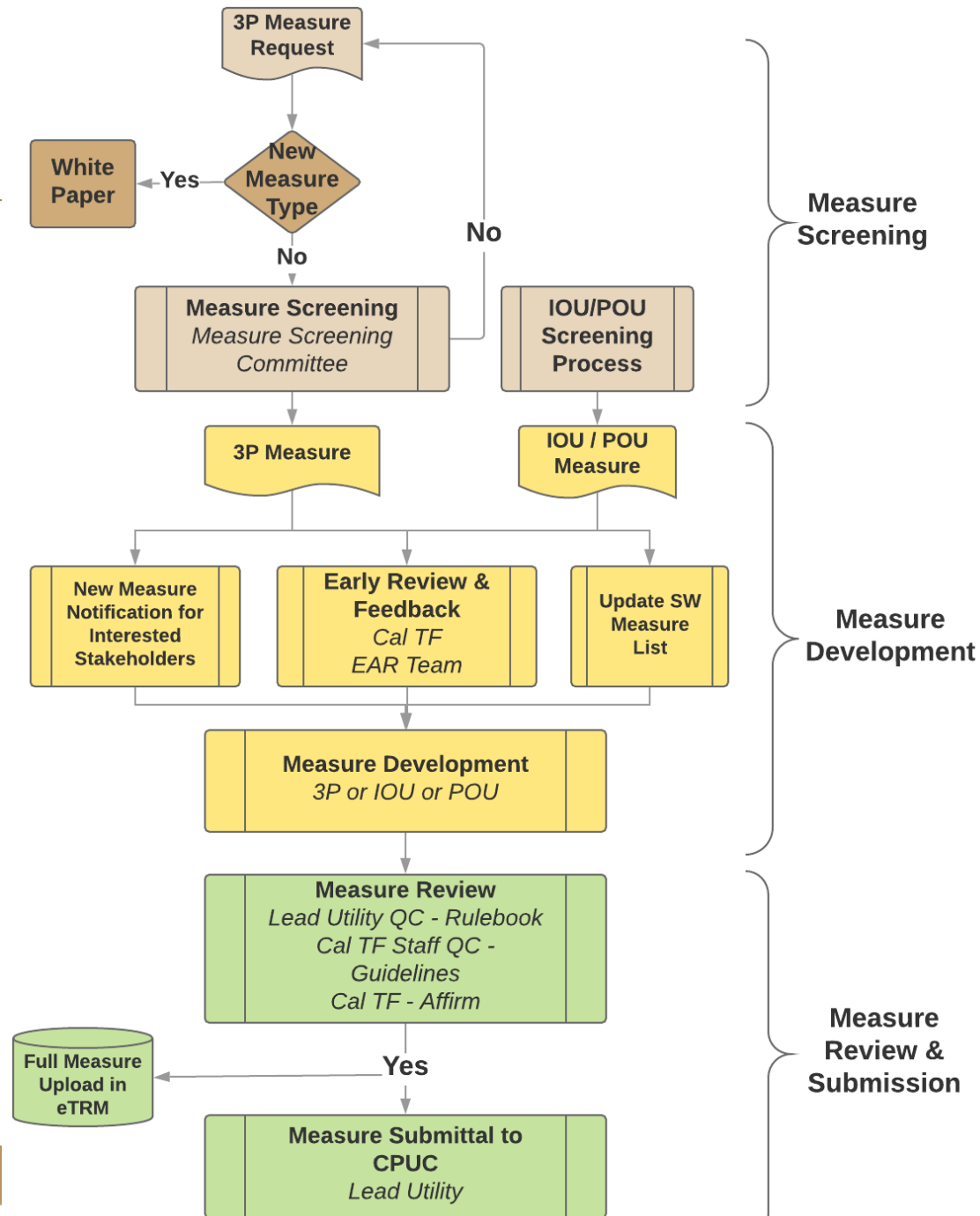
1	2	3
Measure Screening	**Measure Development**	**Measure Review & Submission**

- Goals:
  - ❑ Understand that a new process exists to get energy efficiency measures into utility programs for Third Parties (ie, implementer or manufacturer)
  - ❑ Understand that input data is clearly defined

Process Flow

TPP-11

www.caltf.org/tools
(scroll down to "Technical Position Papers (TPPs)")

3/12/2020

- Statewide Deemed Measure Template:
  - ⭐ Statewide Measure Characterization
  - ⭐ Statewide Data Specification
    - ❑ CPUC Four Ex Ante Tables (IOUs to develop)

⭐ Measure Development & QA/QC Guidelines

⭐ Statewide Deemed Rulebook

⭐ Statewide Measure Style Guide

- California eTRM: *www.caetrm.com*

⭐ Can be downloaded from *www.CalTF.org/tools*

- Technology Summary

- Measure Case Description: Describe proposed efficient technology specification

- Base Case Description: Describe baseline technology specification

  ❑ What is the customer currently using?

- Code Requirements: Applicable state and federal codes or industry standard practice (ISP) information

  ❑ Title 20/24, dispositions, etc.

Measure Submission Form: Supporting Documents

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- Resources: That could inform measure values for the requested measure?
  - ❑ Any Workpapers, DEER measures, Emerging Technology studies, or use of this technology previously in a Custom project, etc.

- Market Potential Evaluation: How much interest will there be and from whom?
  - ❑ Target Markets
  - ❑ Annual Uptake / Demand
  - ❑ Anticipated Savings
  - ❑ Competing Technologies
  - ❑ Barriers to Adoption
  - ❑ Include any applicable supporting resources (i.e. Potential & Goals study and/or similar studies/analysis)

- Is the given technology restricted to a single manufacturer?
- Describe typical manufacturers warranty on product including duration?
- Is the given technology mass produced and ready for mass market distribution?
- Potential impacts to other measures
    - ❑ Could this impact currently approved measures? If so, how?
    - ❑ Will this/these measure(s) replace an existing measure(s)?
- Non-Energy Impacts (Health, Water, Environmental)
- Any health, savings or performance risks identified?
- Data Collection Requirements?
- Are you replacing one gas or electric fuel with the other?

- Savings Unit of Measure (normalizing unit)
- Est. Annual Savings Electric (kWh/yr)
- Est. Demand Reduction (kW)
- Est. Annual Savings Gas (Therms/yr)
- Net-to-Gross Ratio
- Load Shape
- Est. Full Measure Cost
- Est. Incremental Measure Cost
- Effective Useful Life
- *Goal*: Estimate TRC (attach input/output files)
  - ❑ Total Resource Cost (TRC) = Measurement of cost-effectiveness
  - ❑ Looking for "Greater than 1.0"

- Proposed Delivery Type(s)
- Projected Rebate
- Categorize your measure:
  - ❑ Applicable Sector & Sub Sector(s)
  - ❑ Use Category & Sub-Use Category
  - ❑ Technology Group & Technology Type
- Proposed Measure Application Type
- Eligible Climate Zones
  - ❑ List all applicable CA climate zones for which this measure may apply
  - ❑ *REMEMBER*: Statewide!
- Eligible DEER Building Types and Vintages
  - ❑ List those for which this measure may apply
- Any applicable CPUC requirements or restrictions?

Reference Slides

Key Features

Open to 3Ps	Allows Third Parties (3Ps) to propose & develop new & updated measures
Upfront Measure Screening	By committee of multiple stakeholders
Early Input	CPUC Consultant & Cal TF
Standard Template	Standardization increases efficiency & consistency across all measures Data dictionary explains each field
Clear Guidelines	Standardization of QA/QC Ensures high-quality, accurate measure analysis & documentation
Final Review	Cal TF Affirmation CPUC Consultant review & approval for all IOU measures

Measure Screening

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
1. 3P Completes & Submits Measure Submission Form	✓	✓	✓		
2. Cal TF Staff Checks Measure Submission Form	✓	✓	✓		
3. Cal TF Staff hosts Monthly Measure Screening Meeting & Measure Screening Committee Makes Pass/No Pass Determination	✓	✓	✓		
4. Cal TF Staff Documents Result of Measure Screening Committee and Communicates to Requester	✓	✓	✓		
5. Cal TF Staff Collaborates with IOUs & POUs to determine Lead Utility	✓	✓	✓		
6. Cal TF Staff Updates Statewide Deemed Measure List (post to Cal TF website)	✓	✓	✓	✓	✓

Measure Development

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
7. Measure Developer Completes Measure Development/Update Plan and Submits to Lead IOU/POU	✓	✓	✓	✓	✓
8. Cal TF Provides Early Feedback	✓	✓	✓	✓	✓
9. EAR Team Provides Early Feedback	✓	✓		✓	
10. IOU, 3P, or POU Develops Measure as per Applicable Established Guidelines	✓	✓	✓	✓	✓

Measure Review & Submission

	3P Measure Request			IOU Initiates & Develops Measure	POU Initiates & Develops Measure
	3P Develops Measure	IOU Develops Measure	POU Develops Measure		
11. Lead Utility Reviews for Conformance to Deemed Rulebook, EAR Consultant Early Feedback, As Applicable	✓	✓		✓	
12. Cal TF Staff Reviews for Accuracy, Completeness, and Conformance to Style Guide, QA/QC Guidelines, and Cal TF Early Feedback	✓	✓	✓	✓	✓
13. Cal TF Reviews and Affirms	✓	✓	✓	✓	✓
14. Lead Utility (IOU) Prepares Four Ex Ante Tables and Measure Submission Package	✓	✓		✓	
15. Cal TF Staff Conducts Final Review of Measure Submission Package	✓	✓		✓	
16. Lead Utility (IOU) Submits to CPUC for Approval	✓	✓		✓	