



# CALIFORNIA

## TECHNICAL FORUM

### **PROPOSED**

## **Cal TF Business Plan**

### 2016

*To support the growth and success of energy efficiency and IDSM through a technically rigorous, independent, transparent peer review of California energy efficiency values and other related technical information.*

Disclaimer: The Cal TF Policy Advisory Council's (PAC) affirmation of this work plan does not constitute endorsement of ensuing technical work products by individual members or organizations.

2016 Business Plan			
Goal	Metrics	Tactics (Cal TF)	Tactics (Others)
1. Review New Statewide Measures	At least eight (8) new statewide measures reviewed by Cal TF through consensus decision-making.  [December 2016]	<ol style="list-style-type: none"> <li>1. New measure recommendations solicited from TF Members, POUs, others.</li> <li>2. If needed, TF Measure Selection Subcommittee selects measures for Cal TF review.</li> <li>3. Depending on complexity/issues associated with measure, measure may require abstract preparation prior to workpaper development.</li> <li>4. If necessary TF or TF subcommittee provides guidance on early workpaper plan through consensus decision-making.</li> <li>5. Staff solicits early input from CPUC ex ante team on DEER requirements and other ex ante team issues or concerns they would like addressed.</li> <li>6. WP developer develops WP considering input from TF, CPUC Staff, and other stakeholders.</li> <li>7. TF reviews WP and resolves outstanding issues on WP through consensus decision-making.</li> <li>8. If data insufficient to support full WP, Cal TF staff will discuss Interim Approval of measure with CPUC staff.</li> <li>9. Cal TF staff tracks CPUC review of new measure after it is approved.</li> </ol>	<p>CPUC ex ante team provides early input during Cal TF workpaper development on DEER requirements and other issues/concerns that staff would like addressed.</p> <p>CPUC ex ante team meets with Cal TF staff prior to Cal TF measure review to explain any issues or concerns, rationale for, and specific action items.</p> <p>CPUC ex ante team member participates in Cal TF meeting to discuss staff issues and requested action items, and to participate in TF discussion regarding measure.</p> <p>CPUC ex ante team provides feedback on Cal TF-produced WP.</p> <p>Program Administrators may submit Cal TF approved measures to the applicable decision-making entity (CPUC or POU Governing Boards).</p> <p>Program Administrators and other Workpaper developers keep Cal TF staff apprised of Workpaper approval and/or inclusion in POU TRMs for tracking purposes.</p>

<p><b>2. Facilitate Statewide Coordination of Workpaper Development</b></p>	<p>Ongoing</p>	<p>Cal TF staff maintains and updates statewide measure list through monthly meetings with IOU coordination leads.</p> <p>List includes measures that are currently approved, in development, and retired. Measure ideas proposed by TF Members and other stakeholders are also included.</p> <p>Cal TF staff identifies significant overlaps in existing workpapers and facilitates workpaper consolidation process.</p> <p>Cal TF staff facilitates process by which third parties and other stakeholders can develop statewide measures and seek Cal TF review.</p>	<p>IOU workpaper coordinators inform Cal TF staff of measures under consideration, in development, and retired, and status of measures in development during monthly meetings. IOU workpapers leads ensure workpapers that are developed are statewide and include input from counterparts at other IOUs.</p> <p>IOUs consolidate overlapping existing IOU workpapers.</p> <p>CPUC staff supports Cal TF staff statewide coordination role, provides guidance on 2016 workpaper requirements.</p> <p>POU staff and third parties provide updates to Cal TF staff on measures in development, as needed.</p>
<p><b>3. Develop Technical Position Papers to Further Work of Cal TF</b></p>	<p>TF develops and approves at least one (1) Technical Position Paper.</p> <p>[December 2016]</p>	<p>Cal TF staff works with TF to identify Technical Position Papers that will further the work of Cal TF. Cal TF will support development of the Technical Position papers through convening and leading subcommittees, performing research, and producing draft and final position papers for TF review/comment, and affirmation.</p> <p>Possible issues areas:</p> <ul style="list-style-type: none"> <li>• Substantive guidelines for developing deemed measures that would build on work in 2015.</li> <li>• Best practices analysis of custom projects development and review process.</li> </ul>	<p>CPUC ex ante team and other entities (such as the CEC) provide review and comment of Technical Position Papers.</p>

		<p>Cal TF also solicits CPUC staff input and feedback on technical position paper.</p> <p>Cal TF staff posts approved Technical Position Papers on Cal TF website.</p>	
<p><b>4. Implement “Phase 1” of “Electronic TRM” Project (Phase 1 of 2-Year Process)</b></p> <p><b>Project Goal (Two Year):</b> All California deemed measures (approximately 190) documented and moved into Electronic TRM for CPUC approval)</p>	<p>Non-Overlapping POU TRM measures reviewed by Cal TF subcommittee or full TF and moved into Electronic TRM (9 measures) [+9 months after POU representative submits POU WPs to Cal TF staff.]</p> <p>Active IOU WPs consolidated and moved into Electronic TRM (125 measures) [+1 year after project approval. Target: December 2016]</p> <p>One-half of DEER measure WPs reviewed by TF subcommittee or full TF, moved into Electronic TRM (8 of 17 measures) [+1 year from project approval]</p> <p>Overlapping measures consolidated for TF review in 2017 (36 measures)</p>	<p>Cal TF staff prepares list of firms (bidder’s list) who can develop workpapers for DEER measures that don’t have existing WP (17 measures) and for “overlapping” measures (36 measures). (Total 53 measures)</p> <p>Cal TF staff releases and manages RFPs for consultants to develop WPs for non-documented DEER measures and “overlapping” measures. All new measure development shall be in EnergyPlus, unless another energy model is determined to be more appropriate by TF.</p> <p>Cal TF staff works with utilities to finalize contracts with WP developers for the 53 measures described above.</p> <p>Cal TF coordinates WP development and consolidation to ensure standards adhered to and consistent approach taken, solicit staff input, and manage TF review.</p> <p>Cal TF staff interfaces with Department of Energy and all other stakeholders on development of Electronic TRM.</p>	<p>Cal TF staff works with US DOE to develop California-specific, open source Electronic TRM that is integrated with EnergyPlus as modeling tool.</p> <p>IOUs contract with vendors who will prepare WP for DEER measures and “overlapping” measures for Cal TF review.</p> <p>CPUC staff participates in Technical Forum review of WPs they have not previously reviewed.</p> <p>IOUs populate “Electronic TRM” with all existing active workpapers, and new IOU “consolidated” measures.</p> <p>POUs develop POU WPs and populate measure platform with TRM workpapers as they are reviewed and approved by Technical Forum.</p> <p><i>California Public Utilities Commission approves final electronic Technical Reference Manual. [2017]</i></p>

<p><b>5. Release RFQ for Technical Forum members to be seated June 1, 2016 (if needed)</b></p>	<p>Cal TF staff releases TF RFQ and ensures timely selection of qualified technical experts.</p> <p>[June 2016]</p>	<p>Cal TF staff determines by January 2016 how many current TF members will continue participation through 2015-2017 term.</p> <p>If fewer than 30 current members choose to remain on Cal TF, Cal TF staff writes and releases RFQ for TF members.</p> <p>If needed, Cal TF staff manages RFQ process, including convening and supporting an applicant review subcommittee of the PAC.</p> <p>By June 2016, Cal TF staff develops and seeks PAC approval of criteria for evaluating members interested in participating past 3<sup>rd</sup> year.</p>	<p>If needed, PAC approves TF members selected for 2016-2019 (first three-year term).</p>
<p><b>6. Develop 2017 Cal TF Business Plan</b></p>	<p>2017 Business Plan.</p> <p>[Draft: November 15, 2016; Final: December 10, 2016]</p>	<p>Cal TF staff solicits comments on Cal TF 2017 Business Plan from TF, PAC, CPUC and CEC staff, and other stakeholders.</p> <p>Cal TF staff updates draft document reflecting input.</p> <p>Cal TF staff develops final document reflecting input for PAC review and affirmation in the December 2017 PAC meeting.</p>	<p>PAC, TF, CPUC staff and others provide input on 2017 Cal TF Business Plan.</p> <p>PAC approves 2017 Business Plan by December 2016.</p>
<p><b>7. Provide Third Year Review of Cal TF</b></p>	<p>Cal TF achieves goals in Cal TF 2016 Business Plan. Final report submitted to PAC</p> <p>[Second quarter, 2017]</p>	<p>Cal TF staff solicits feedback from TF and, workpaper developers on the value of Cal TF, areas for improvement.</p> <p>Second year report containing results compared to 2016 Business Plan metrics and feedback from stakeholders submitted to the PAC.</p>	