

Workpaper Training Q&A

April 11, 2019



Today's WP Q&A

- ▶ Purpose of today's Q&A is to give bidders an opportunity to ask questions they may have on deemed workpaper (WP) development as they prepare their program proposals
 - Not intended to be a WP training
- ▶ The IOUs have active solicitations & are not allowed to answer questions or provide information that would give attendees an advantage over non-attendees
- ▶ All attendees will be muted
- ▶ Please enter your questions into the Questions/Chat panel or "Raise Your Hand" and we'll unmute you
 - You must enter your PIN number to become unmuted
- ▶ We've prepared some slides based on questions received but feel free to ask questions at any time

Public Resources

- ▶ <http://www.DeeResources.com>
 - READI (Remote Ex-Ante Database Interface), a program that allows users to examine the CPUC's databases of ex ante measure information
- ▶ <http://www.DeeResources.net>
 - Workpaper and disposition archive
- ▶ <http://www.cpuc.ca.gov/egyefficiency>
 - CPUC Energy Efficiency website
- ▶ <http://www.cpuc.ca.gov/General.aspx?id=4132>
 - Ex-Ante Review Material
- ▶ [EE Programs Solicitations Information & Resources](#)
 - The FAQs from the workpaper trainings are available on PEPMA
- ▶ <http://www.caltf.org/statewide-measure-list/>
 - Monthly posting of updates to existing or new workpapers on the CalTF website

Public Resources

► <http://www.caltf.org/tools>

- Statewide Data Specification
 - The template to be used to develop the **savings inputs** for statewide deemed measures
- Statewide Measure Characterization
 - The template to be used to develop the measure characterization **text** for statewide deemed measures
- Statewide Measure Development & Peer Review QA/QC Guidelines
 - Guidance for measure development, QA/QC, and management approval of a statewide deemed measure
- Statewide Deemed Workpaper Rulebook
 - A compendium of current CPUC directives for estimating ex ante savings claims for energy efficiency measures using the deemed savings calculation method

What is DEER?

- ▶ DEER – Database for Energy Efficiency Resources
 - URL: <http://deeresources.com/>
 - Developed, administered, and maintained by the CPUC
 - Provides estimates of energy savings potential for mass-market energy efficiency measures commonly installed in the marketplace
 - DEER prototypes, underlying workbooks and calculators used with MAS Control system for core set of deemed/prescriptive measures
 - Measure savings values and other parameters are stored in a database
 - READI tool provides an interface to DEER databases
 - General use questions: deersupport@dnvgl.com

What is a Non-DEER Workpaper?

- ▶ URL: <http://www.deeresources.net/>
- ▶ Documentation prepared to substantiate
 - Data, methods, and rationale used for ex-ante values
- ▶ Ex-Ante Values
 - Estimated values used to support energy savings claims before impact evaluation is conducted
- ▶ Non-DEER WPs are generated when
 - DEER values, assumptions and methods are not available or not adequate for the specific delivery approach or application
- ▶ Input on areas for improvement or issues limiting access ersdeeresources@gmail.com

Workpaper Submittals and Approvals

Workpaper Status - September 2018 - March 2019

Effective Year	2018	2019	2020	Total
Issued Dispositions/Interim Approval	41	72	11	124
Workpaper submitted - Ex Ante Review In progress	0	3	55	58
Total	41	75	66	182

Approximately 50-100 additional workpapers to be submitted in 2019 for effective year 2020

- ▶ Download active workpapers: <http://deeresources.net/workpapers>
- ▶ Monthly workpaper review report: <http://www.deeresources.com/index.php/non-deer-workpapers>
- ▶ Workpaper related questions:
 - ersdeeresources@gmail.com
 - Kerri-Ann Richard: krichard@ers-inc.com



Questions for CPUC Staff

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Procedure Questions

- **How can default Estimated Unit Life (EULs) be modified**
 - As part of the Rolling Portfolio process stakeholders can propose changes to the current default EULs.
 - DEER values are reviewed once a year.
 - DEER 2021 updates coming soon.





Workpaper Solicitation

- **How do I know proprietary data or program approach or modeling tool will be kept confidential?**
 - There are provisions whereby some information can be kept confidential
 - Workpapers will require that some functional information on product features that save energy is provided as part of publically available information
 - Workpapers once approved are public information





Policy Questions

- **Can 3Ps submit workpapers directly to the CPUC?**
 - No, they cannot do so under current rules.
 - Pursuant to Decision 18-01-004 (Section 3.10.11) the CPUC stated we “intend to undertake such further considerations in energy efficiency rulemaking R.13-11-005 or its successor in the future” and “the program administrators are required to accept and review all third party workpapers before submission to the Commission”





Emerging Technology Questions

- **How does the CPUC help Emerging Technology (ET) Developers obtain accurate testing of the energy efficiency performance of their products? How can Emerging Technology Developers obtain a level playing field with respect to IOU ET reports, IOU workpapers and CPUC-sponsored EM&V studies?**
 - Emerging technologies are a program implemented by utilities.
 - Workpaper team will raise the issues with ET Staff, so it can be addressed in context of program oversight as well. Note that in the future the Third Party implementer will manage the programs.
- **How do stakeholders (including 3Ps) submit corrections to IOU ET reports, workpapers, CPUC dispositions, and EM&V studies. How will it be determined what the “latest EM&V studies and best available data is used?”**
 - The CPUC and its contractors (ex ante team) review submitted workpapers and determine how the most recent and accurate data will be used.
 - Another channel could be reaching out to Cal TF and raising awareness.





Emerging Technology Questions

- **Does the CPUC have a process for IOUs and Technology Developers to work collaboratively during testing and evaluation of emerging technologies, workpapers and EM&V studies?**
 - Technology developers can work collaboratively with utilities. EM&V study results are made public by the Commission.
- **Can 3rd parties apply for funding from Emerging Technologies (ET) program to have an independent laboratory test their emerging technology products?**
 - This is a good question and can be answered in the context of statewide solicitation process. We encourage you to participate in the process.





Emerging Technology Questions

- **How can a 3rd party technology developer correct a utility ET report that provides test data of a 3rd party technology developer's product, but actually didn't test the technology developers' product properly or tested a different product not representative of the 3rd party product?**
 - Work with the utility sponsoring the workpaper. Cal TF should be another venue.
 - If not satisfied, contact the CPUC.
 - If still not satisfied follow the dispute resolution process of the CPUC.
- **Can 3rd parties submit independent test data to correct errors and omissions in utility ET reports or work papers for emerging technologies? (for IOU workpapers and EM&V studies?)**
 - EM&V studies and results are a public process. ED Staff are open to collaboration on ideas and improvements.
 - As for correcting errors in workpapers and reports, please refer to slide 12.



Questions?



Workpaper FAQs

- ▶ Where do I submit my proposed workpapers [deemed measure] or workpaper [deemed measure] update?
 - **SoCalGas:** Contact the SoCalGas contact listed in PEPMA <https://www.pepma-ca.com/public/ContactUs.aspx>
 - **SCE:** Please submit your request for SCE to review and submit this workpaper to eas@sce.com . Please complete and submit an Engineering Analysis (EA) Request form and submit it with your request. You may download an EA Request form from sceonlineapp.com. Once you've accessed the website, navigate to "Forms" and select and download the EA Request form.
 - **PG&E:** 3Ps can submit proposed new deemed measure requests or deemed measure updates to the Deemed Product Support team at dpswp@pge.com.
 - **SDG&E:** Please refer to SDG&E instructions for workpapers within each specific solicitation. For complete information on SDG&E's solicitations, please go to <https://www.sdge.com/more-information/doing-business-with-us/energy-efficiency-third-party-solicitations>

Workpaper FAQs

- ▶ Where can I get help if I have questions about a requirement?
 - Please contact the IOU contact listed in PEPMA for any Questions related to workpaper requirements.
 - Link: <https://www.pepma-ca.com/public/ContactUs.aspx>
- ▶ Where do I find the base case or industry standard practice?
 - Industry Standard Practice (ISP) represents today's market trend, i.e., whether a technology would be commonly purchased by customers today (not in-situ or saturation), with consideration of key factors or barriers driving the technology adoption.
 - ISP Guidance document incorporating T2WG participant recommendations: <https://pda.energydataweb.com/#!/documents/2134/view>