

Overview of the California Technical Forum for Commissioner Peterman and Staff



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The California Technical Forum



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What is the Cal TF?

A statewide group of technical experts that works in a collaborative and transparent way to develop accurate and credible savings estimates and methodologies for specific energy efficiency measures.

The California Technical Forum: Addressing our State's Needs

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Longstanding Energy Efficiency Goals

- Collaborative
- Transparent
- Well-Documented
- Uses Best Available Data
- Balanced
- Minimizes Ex Post Risk

Potential for Improvement

- Broad collaboration to build support for results
- Increased usability of values
- Better balance between cost, timeliness, and certainty

The Cal TF Opportunity

- Opportunity for regional and national input
- Inclusive and consistent across the entire state
- Reduces complexity
- Meaningful, independent, expert peer review
- Cost-efficient
- Can serve as a national model

Supported by Best Practices: Stakeholder Collaboratives Research

- ❑ Starting Point: **Northwest Regional Technical Forum**
- ❑ Modified through **stakeholder discussions** and “**Best Practices**” research:
 - California DSM Measurement Advisory Council (CADMAC)
 - The International Performance Measurement and Verification Protocol (IPMVP) and the Efficiency Valuation Organization (EVO)
 - California Board for Energy Efficiency (CBEE)
 - California Measurement Advisory Council (CALMAC)
 - Low Income Advisory Group, or Low Income Oversight Board (LIOB)
 - The IOU’s Energy Efficiency Program Advisory Groups (PAGs)
 - The PAGs’ Peer Review Groups (PRGs)
 - California Renewable Energy Transmission Initiative (RETI)
 - CEC’s Demand Analysis Working Group (DAWG)
 - The Uniform Methods Project (UMP)
 - The current EE Program Coordination Groups (PCGs)
 - ASHRAE
 - The International Code Council (ICC)
 - LEED (Leadership in Energy & Environment Design) Rating System
 - Northwest Regional Technical Forum (NW RTF)
 - Illinois Energy Efficiency Stakeholder Advisory Group (SAG)
 - Northeast Energy Efficiency Partnerships (NEEP) EM&V Forum
 - Connecticut’s Energy Efficiency Board (EEB, formerly ECMB)
 - Rhode Island Energy Efficiency and Resources Management Council (RI EERMS)
 - Massachusetts’s Energy Efficiency Advisory Council (EEAC)

A Broad Collaborative

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CPUC Office of Ratepayer
Advocates



Technical Forum

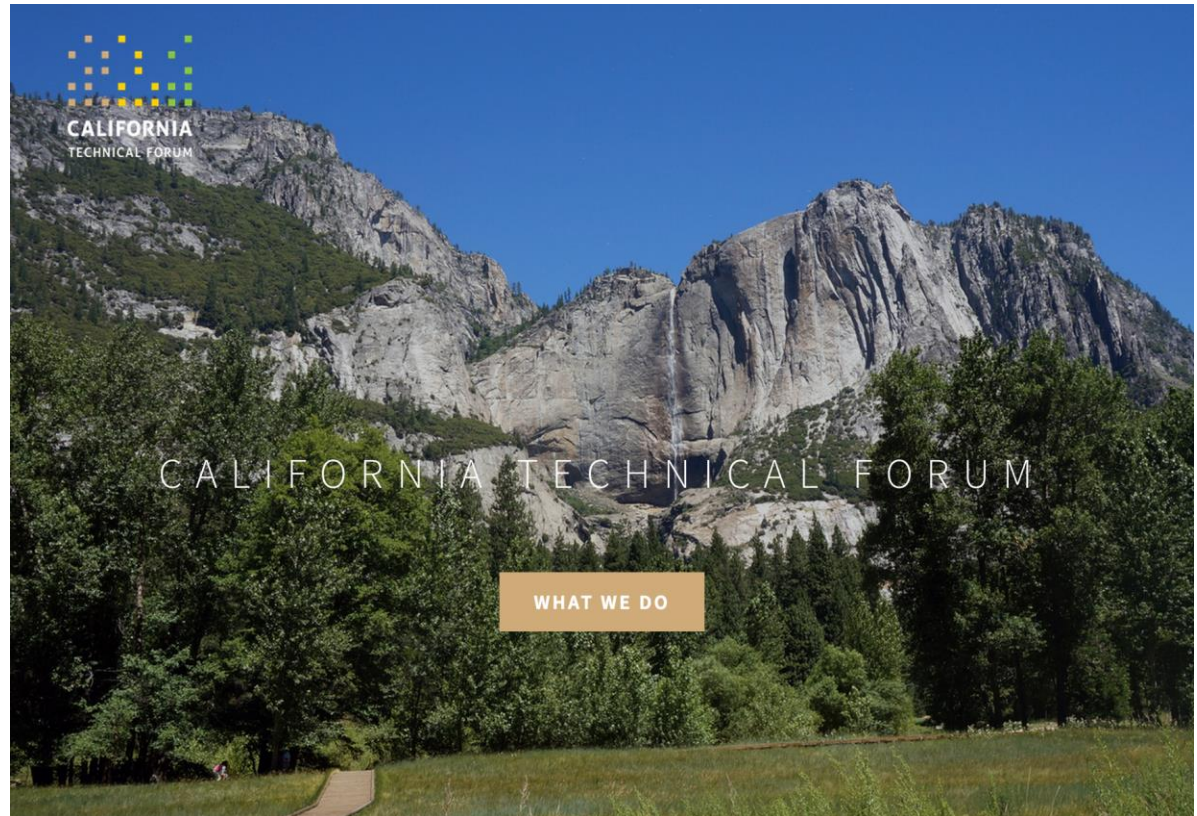
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- **Selected through a competitive RFQ process with a ~50% selection rate.**
 - CPUC input on selection criteria
 - Even more competitive selection rate expected for 2015
- **2014 Composition:**
 - 29 members selected
 - 400+ years combined industry experience
 - Drawn from utilities, implementers, local government, and academia
 - 30% from outside of California

Rigorous, Transparent Results

www.CalTF.org

- All documents for measures approved or under review
- Meeting notes and other materials
- TF and PAC member information



2014 Accomplishments

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- Recruited technical experts to participate in new forum
- Conducted foundational/best practices research
- Launched Cal TF in June, 2014
 - Developed operations manual, templates, checklists, and tools
- Developed public website: www.CalTF.org
- TF review and approval of 5 new workpapers
 - Condensing Unit Heater (SCG)
 - Circulating Block Heaters (SCE)
 - Variable Speed Pool Pumps (SCE)
 - DC Pool Pumps (SDG&E/SCE)
 - Commercial Dishwashers (SCG)

2015 Work Plan

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- Continue to memorialize DEER requirements
 - Essential for streamlining process and reducing contentiousness.
- Continue and expand review of new and outdated statewide workpapers
- Establish subcommittees to review and develop guidance on crosscutting technical issues and allow more in-depth discussions on measure-specific issues
 - CPUC Staff has expressed interest having Cal TF develop positions on ex ante issues for CPUC staff review.

Cross Cutting Technical Subcommittees

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- Currently ongoing:
 - Measure Complexity / Best Available Information
 - Savings Below Code
 - POU TRM Review / DEER Documentation
- Expected in the near future:
 - Residential HVAC Quality Installation
 - Variable Refrigerant Flow

Measure Complexity Subcommittee

- Trade-offs between measure complexity, precision /accuracy, cost, and ability to respond to fast-moving markets
- Commission directive to use best available information sometimes difficult to implement
- In the absence of existing guidance, subcommittee will create guidelines for:
 - Preferred calculation approaches
 - Use of measure expiration dates
 - Level of statistical rigor
 - Appropriate number of measure combinations
 - Relative impact of calculation inputs on individual point values, high level portfolio goals
 - Cost of obtaining information, updating workpapers, etc.
- Guidelines will seek to avoid both
 - “False precision” - more measure combinations does not necessarily translate into more accurate measure parameters and
 - “Bias” – Values that are neither too high nor too low

POU TRM Review Subcommittee

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- Joint POU requested review of select subset of POU TRM measures by Cal TF
 - Targeting 8 to 10 measures
- DEER provides values or foundational info for many POU TRM measures
 - POU TRM review creates opportunity to leverage DEER documentation needs
- Objectives:
 - Document DEER methodologies and data sources when applicable
 - Vet the methods, data, assumptions used to develop TRM values
 - Compare values, methods, data, assumptions with other jurisdictions
 - Issue recommendations on how/if measure to be updated
- Measure review done through subcommittees, open to non-TF members
- Findings to be documented in a report, shared with POU and CPUC

Cal TF's Vision for the Future

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.

- Statewide coordination on efficiency estimates
 - Savings values shared among CEC, CAISO, CPUC
- Timely, accurate, and transparent analysis
 - Improve and simplify current approach
- Consistent statewide approaches on savings estimates
 - Inclusive approach with broad stakeholder support
- Reduced cost and contention