2016 Business Plan: Q3 Progress Report

CALIFORNIA
TECHNICAL FORUM

ANNETTE BEITEL
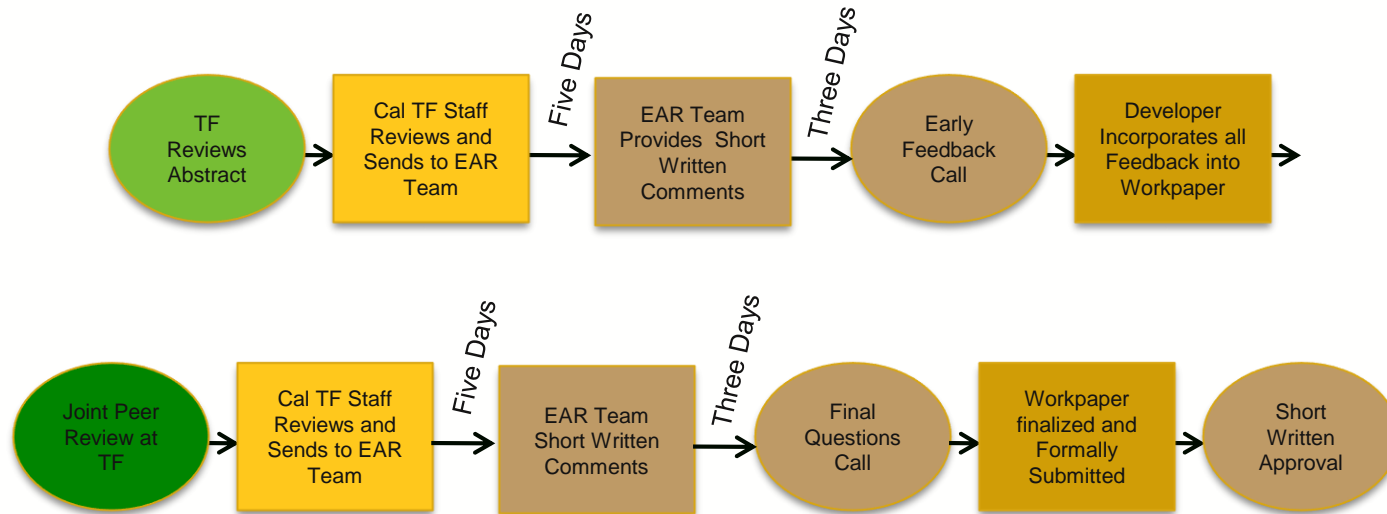
OCTOBER 2016

2016 Business Plan Overview

1. Review and approve selected (at least eight) measures

2. Facilitate statewide coordination of IOU workpapers

3. eTRM: Continue Development of eTRM Workplan

4. Develop Technical Position Paper(s) related to eTRM (at least 1)

5. Release RFQ for TF members

6. Develop 2017 Cal TF Work Plan

   ✖ Later in year

7. Cal TF, Third Year Review (2017 Activity)

Goal 1: New Collaborative Workpaper Review Process: Theory

Row 1:

TF Reviews Abstract → Cal TF Staff Reviews and Sends to EAR Team → *Five Days* → EAR Team Provides Short Written Comments → *Three Days* → Early Feedback Call → Developer Incorporates all Feedback into Workpaper →

Row 2:

Joint Peer Review at TF → Cal TF Staff Reviews and Sends to EAR Team → *Five Days* → EAR Team Short Written Comments → *Three Days* → Final Questions Call → Workpaper finalized and Formally Submitted → Short Written Approval

Legend

- ☐ Substantive measure work
- ○ Decision point
- ☐ Cal TF staff leveraging PA staff
- ○ TF review and affirmation
- ☐ Workpaper developer
- ○ Joint peer review and affirmation from TF; Staff/EAR team participation
- ○ CPUC Staff; EAR Team; WP Developer; Cal TF Staff

- **Test Cases**
  - Garage Luminaire
  - Q-Sync Motors
- **Results**
  - Garage Luminaire
    - Disposition – Direction to use completely different methodology than proposed/discussed with EAR Team; other issues
    - WP Developer and sponsoring utility observations/conclusions from experience
  - Q-Sync
    - No disposition – EAR Team feedback: Measure has lots of potential - not ready for market
    - Observations/conclusions from experience
- **Summary Observations: CA New Measure Approval Process**
  - Data/Observations from past three years?
  - What Next?

2016 Cal TF Measures Reviewed

- Third Party Measures
  - Ductless Mini-Splits**
  - Efficient Pumps*
  - Smart Thermostats*
  - Q-Sync motors
- IOU Measures
  - LED Tubes*
  - LED Garage Luminaires
  - LED Billboard Signage*
  - LED Lamps – 4 pin**
  - VFD: Fluid Pump VFD, Well Pump VFD, Process Pump VFD**
  - LED Methods – Switching to Lumen Equivalency from Wattage Reduction Ratio
  - LED Methods – Wattage Range**
- Other measure review
  - Appliance Recycling Methodology for reviewing POU TRM

NOTE: * means in review, and ** means TF provided input but did not affirm.

Goal 2. Facilitate Statewide Coordination of IOU Workpapers

- **CPUC Staff Directive**
  - ❑ IOUs must coordinate on WP development and submit only one WP per measure

- **Cal TF Monthly Coordination**
  - ❑ WP leads make updates to master list; consolidated
  - ❑ Monthly call to discuss current and upcoming new measures and changes

- **Other SW Coordination Activities - Needs to be Focus in 2017**
  - ❑ **Measure Consolidation**: Measure consolidation process.
  - ❑ **Common Development Guidelines/QA/QC**: Reviewed existing utility WP development/QA/QC procedures – recommending single procedure for all workpapers
  - ❑ **Common Repository**: Open to all
  - ❑ **Agreement on Cost Reductions:** Need to build agreement (between PAs and CPUC Staff) on changes that will reduce WP development/maintenance costs
  - ❑ **WP Development Process Open to All**: Consistent with Final Decision
  - ❑ **Process for Further Data Collection/Research to Refine Values**

Goal 3: Continue Development of eTRM Workplan

- Collected all active WP
  - Developed plan for consolidating
- POU/IOU Charrette for eTRM specifications
- Drafted eTRM RFP (July)
  - Internal review status
- Developed TPPs/Other Docs needed to guide work
- Built staff support
  - Joint CPUC and Cal TF Staff "Next Steps" Memo
- Developed budget
  - May PAC presentation
- Further Development
  - eTRM Workplan
- Open Remaining Items
  - Discussion

Goal 4. Develop Technical Position Papers Necessary for eTRM (at least 1)

- 2016 TPP Supporting eTRM development
  - ❏ Topic: **Existing Measure Consolidation/Review process**
  - ❏ Approach
    - ✗ Checklist and Template-driven process for consistent approach
      - ○ Checklist and Template: Overlapping Measure Comparison
      - ○ Template: Workpaper Source Quality Analysis Template
      - ○ Template: Other TRM Analysis (if needed)
    - ✗ Process: Overlapping Measures
      - ○ Summarize and Identify similarities/differences
      - ○ Gather and analyze source documents
      - ○ Subcommittee input to harmonize differences
      - ○ Place measures in eTRM data form
  - ❏ Status
    - ○ TF has reviewed/refined approach twice
    - ○ Approach piloted on select LED measures
  - ❏ Draft: November TF; Final December Cal TF approval
    - ✗ Test in 2017

- 2016 TPP Supporting eTRM development

  - ❑ Topic: **Cal TF QA/QC Process and Standards**

    - ✖ Draft process reviewed twice by Cal TF

    - ✖ Cal TF Staff collected/reviewed internal utility procedures

    - ✖ Cal TF Staff has reviewed ESPI feedback, plus staff's feedback on same.

  - ❑ Timing

    - ✖ Draft TPP November; Final Approval December

    - ✖ Test and learn in 2017

- Proposed: TPP #8: **Preponderance of Evidence for Early Retirement/Repair Eligible Measures**

  - ❑ Builds on Prior Cal TF Work

    - ✖ Repair eligible TPP (2015)

    - ✖ ACEEE Informal Session

    - ✖ Draft memo re: same

  - ❑ Need volunteers to participate in 2 – 3 subcommittee meetings to complete

  - ❑ Can inform ED's Working Group (Lead: Sue Haselhorst – ERS)

    - ✖ To inform, would need to finalize in next few weeks

Goal 5. Manage RFQ for New TF Members

- ## 2016 Solicitation: Approach
  - ❑ Limit to 35
  - ❑ Needed expertise: Behavioral, modeling, statistics, study design, EM&V.
  - ❑ Requested continuing members to stay through completion of eTRM to maintain continuity through eTRM process
  - ❑ Stagger thereafter

- ## 2016 Solicitation: Status – Ready Since April, 2016 – on hold
  - ❑ Ready for release pending final approval of eTRM project
  - ❑ If eTRM does not move forward, will need to survey existing members again to see who wishes to continue
  - ❑ Likely several more spots to be filled
  - ❑ Release date?

Conclusion

- Will meet 2016 Cal TF Business Plan goals

- More early engagement and direct engagement by CPUC Staff and EAR Consultants

- Significant progress on eTRM

BUT

- End product (Workpapers) not accepted by EAR Consultants, and collaboration with EAR Consultants has not improved outcome, need alternative approach for new measure development for 2017 and beyond

- Cal TF recommendations for change
- Cal TF Staff recommendations for change