# Topic: Industry Standard Practice (ISP) Process for Custom Measures/Projects

# Group Participants (notes combined from discussions at Dec TF meeting):

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* Spencer Lipp and John Zwick

# Issue Statement

*Write issue statement that clearly states the challenge/problem and/or opportunity for stakeholder benefits.*

Streamline the process for conducting Industry Standard Practice assessments and sharing ISP results and data between project development teams and the IOUs.

For measures likely to be widely adopted (not necessarily Custom) and for programs with high participation, identify specific market segments or potential products/measures that need an ISP.

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| Target Audience  *Who cares about this problem? Who are we trying to persuade? Who will be able to take action?* | * IOUs * 3P Implementers * Project Developers/Implementers * Commission Staff (CPUC) * Technical Reviewers * Emerging Technology partners/participants |
| Stakeholder Benefits  *What are the benefits of accomplishing the goals or implementing the solution(s) proposed in the White Paper?* | * Greater certainty on the baselines for large Custom projects * Greater certainty on the results and savings for projects and programs * Predictability of project outcomes * Reduced project development costs * More customer satisfaction and less stakeholder frustration * Fewer supplemental data requests * Faster project review timelines * Reduction in project timeline; reduction in time for implementers and reviewers * Identify scope creep * Clarify acceptable burden of proof for AR, Influence, and Installation verification * Clarity of requirements for a program * Improve ex-post evaluation results * Increase in the rate of adoption of new projects/measures |
| Potential Research / Analysis Approach  *What is the analysis approach to the research that needs to be done to devise one or more potential solution(s)?* | * How do we improve the process and better communicate the results? * Review the current process and gather successful ISP * Gather the results of recent ISPs and recent ISP attempts * ISP studies that did not (to perhaps pick up where they left off) * Survey project developers to better understand current processes * Gather/survey stakeholders to identify project opportunities that do not move forward as a result * Quantify benefits of potential streamlining and simplification * Quantify cost of doing nothing * Streamlining * A survey template applicable to multiple markets * Review existing data on measure and market * Literature review of surveys on the applicate market sector(s), technologies and end uses * Review recent market saturation studies (RASS), ex-post evaluation studies and their recommendations * The IOUs’ business plans: forecasts and references * Emerging Technologies reports * Ability to access the ISP studies from all of the PAs/IOUs * Leverage CalTF to identify ISP research underway and communicate ISP studies and results (ability to collaborate) |
| Potential Data Sources (Primary and Secondary)  *What are the data sources that will be analyzed? Are the data accessible?* | * Surveys and/or interviews of stakeholders * Custom claims * Custom dispositions * Common understanding of what and who are acceptable references * Explore the California Energy Code (Title-24), Department of Energy, ASHRAE 90.1, ASTM, AQMD, CARB, CalOSHA, IESNA, AHRI, DLC |
| Related Work/References  *What past or ongoing work or work products should be referenced or leveraged for this effort?* | * ISP Guidelines * E-4939 and other CPUC decision and resolution guidance * Emerging Technology Studies * Impact evaluations * Codes And Standards Enhancement (CASE) reports * Other states’ Technical Reference Manuals (TRM) * Custom project dispositions |
| Key Technical & Policy Considerations and Challenges  *What are the barriers and potential obstacles to address this problem? What are the barriers to completing this white paper? Any timeline considerations?* | * Constraints and unintended consequences imposed by current CPUC regulatory policy * Current practice that has to be defined, not existing conditions (no like-for-like replacements) * Bureaucratic review process * Review Protocol 2.0 (RP2) * Lack of data for unique custom projects * Modifying policy that already has momentum |
| Availability of Resources to Complete Whitepaper  *Are enough people able and willing to contribute to the development of this white paper? List subcommittee members here.* | * Charles Ehrlich (PG&E) * TBD (We don’t expect a problem recruiting interested contributors.) |
| Value/Potential Impact  *Rate the impact on the CA EE/IDSM industry (high, med, low) and describe. Is the impact commensurate with level of effort/costs required?* | * Increase custom savings * Access untapped opportunity * Address some projects that would otherwise not feasible * Find balance between rigor and savings goal * Levels of rigor applied to ISP similar to E-5115; Explore E-5115 for what it might suggest * Faster approval of large, unique projects * Shorter review time and higher approval rate and higher NTGRs |

Notes Collected from Stakeholder WP Survey:

* This is the ultimate "Square Peg in a Round Hold" issue - Taking a measure or project that, by design, is tailored to a unique and specific application and customer's requirements, and requiring a population-level study of standard practices (with a range of responses that must be used to somehow arrive at a "typical" or "standard" result) to be used as a counterfactual scenario. (Roger Baker)
* If we're doing ISP studies, we should be including information to transition custom measures to deemed/hybrid calculation. (Greg Barker)
* The above description about the requirements of performing ISP research on a project by project basis are not accurate. Not sure what is the issue that is being addressed under this item. (Sepi Shahinfard)
* Establish a logical pathway that does not require so much upfront research to determine a standard practice. (Armen Saiyan)
* I have heard complaints from contractor / applicants that projects aren't handled similarly (Gary Fernstrom)
* Yes, and suggest focusing on important CPUC energy division initiatives such as low GWP, electrification/ de-carbonization/ fuel substitution etc. (Ed Reynoso)
* I’d like to contribute to this paper. (Charles Ehrlich)
* This paper should also review a process for CalTF to recommend/adopt the findings of ISP studies - currently CPUC staff or consultants accept or reject study findings after soliciting input from stakeholders (in some cases) (Jay Bhakta)