

# California Technical Forum and the eTRM



**ANNETTE BEITEL**  
**APRIL 19, 2018**

# Cal TF: A Broad Collaborative

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CPUC Office of Ratepayer  
Advocates



**SMUD**



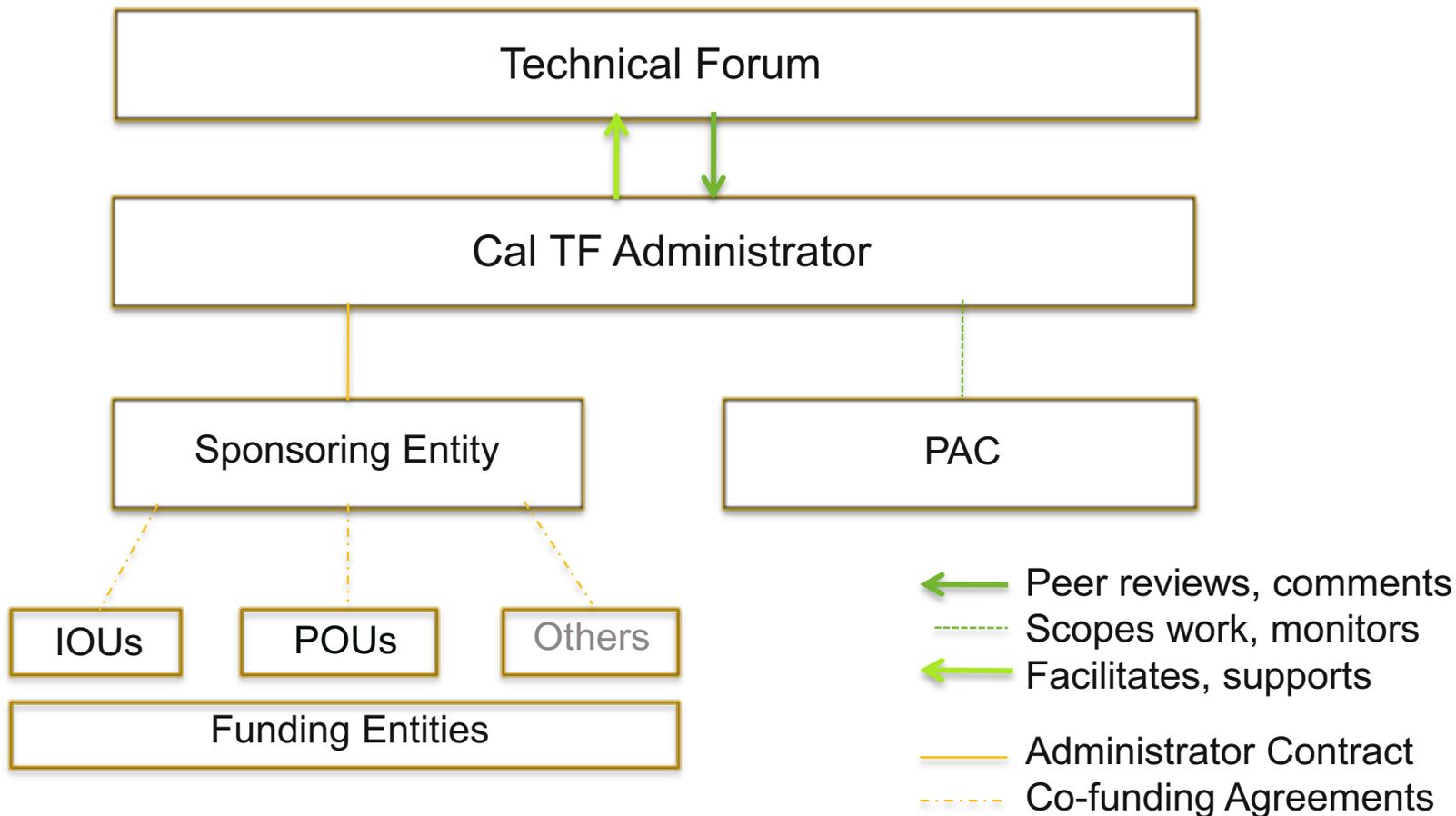
California  
Energy Efficiency  
Industry Council



# The Cal TF

## The Collaborative Supports the Technical Experts

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# The California Technical Forum (Cal TF)



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## *What is the Technical Forum?*

A group of in-state and out-of-state technical experts that work in a collaborative and transparent way to review new and updated energy efficiency measures and other technical information related to California's integrated demand-side management portfolio.

# Cal TF Website

[www.caltf.org](http://www.caltf.org)



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# DEER, “Workpapers” vs. Technical Resource Manuals (TRMs)

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- **EE measures for which savings values are determined *a priori* are “deemed”**
  - Minimizes performance risk for administrators/implementers
  - Most appropriate for measures we have experience with and/or are less complex, less risky
  - These measures accounted for about **61% of the electric savings and 36% of the gas savings** of the California investor-owned energy efficiency portfolio administered in 2016.
- **TRMs document deemed EE measure information**
  - Measure savings and inputs to determine cost effectiveness
  - TRMs exist for different jurisdictions across the U.S.
  - TRMs used for program planning, implementation, tracking, and regulatory reporting

**“TRMs are important because ... deemed savings values, deemed calculations, and deemed variables and factors are used to assess the impact of a significant portion of efficiency measures.”**

**(DOE SEE Action Guide, 2017)**



# State Policy Goals and Drivers for Change

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- **Use Credible, Statewide-Consistent Values for Forecasting and Planning and Reporting Energy Savings**
  - Current system is not accessible to all program/portfolio administrators
  - Deemed measures/savings are not consistent statewide, gaps in geographic availability
  - Current system is too complex, opaque, hard-to-use and understand
- **Increase Inter-Agency and Regional Coordination**
  - CEC and CPUC use different modeling tools to calculate energy savings.
  - Collaboration needed among IOUs, POU, RENs, CCAs as program/portfolio administrators
- **Energy Efficiency as a Resource**
  - Efficiency cannot be a credible resource if IOUs and POU use different approaches and values for calculating savings from energy efficiency
- **Double Energy Efficiency Savings by 2030**

## More Drivers for Change ...

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- **Program Design and Implementation by Third-party (i.e., private sector) Contractors Will Account for 60% of the CA EE Portfolio by 2020.**
  - Current system is not accessible to all program/portfolio administrators,
  - Current system is too complex, opaque, hard-to-use and understand by “outsiders”

# The Electronic TRM (eTRM)

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- **Cal TF Seeks to Improve Quality of and Process for Developing and Updating Deemed Measures for California**
- **Measure “Consolidation”**
  - Collaborative effort among SMEs to consolidate (approved) utility-specific measures into single measures for statewide use
  - Stakeholder consensus on measure definitions, baseline, methods, assumptions, costs, adjustment factors, (NTG, IR, etc.)
- **eTRM Platform Development**
  - Online relational database
  - User-friendly platform with customizable views and reporting capabilities
  - Streamline review/update processes
  - Increased accessibility to the marketplace

# Key Benefits of an Electronic TRM

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- **Improves Documentation and Transparency**
  - Ability to embed tools and supporting documents
  - eTRM reference library
  - Enables more detailed revision histories
- **Reduces Cost and Increases Efficiency of Data Management**
  - Through APIs, automatic download of values into utility tracking and planning databases
- **Highly Transparent Workflow Management for New and Updated Measures**
- **Streamlined Review and Update Process**
- **Keyword Searchable**

# Conclusion

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- ❑ Status of eTRM
- ❑ Next Steps
- ❑ Benefits of Collaboration