

The California Technical Forum

“Cal TF”

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Energy Efficiency EM&V Webinar Series

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Executive Summary

- The California Technical Forum (Cal TF) will be a collaborative of technical experts who use independent professional judgment and a transparent, technically rigorous process to develop and review energy savings estimates and other technical parameters related to the California energy efficiency portfolio, including:
 - Savings estimates for new measures
 - Technical guidelines, forms, templates, and protocols to support measure development and updates
 - Website: Well-organized, easily searchable website so that technical information, including documentation and decision-making, is easily accessible and transparent
 - Other technical resources needed to support California's energy efficiency investments.

Background

- Energy efficiency is more important than ever.
- Efficiency program planning and crediting require “deemed” estimates.
- Developing deemed estimates can be contentious and resource intensive.
- Collaboration and peer review are valuable tools to increase quality and reduce costs.
- The Regional Technical Forum (RTF) offers a compelling model.

Goals

- Technical rigor through effective peer review
- Independent and unbiased estimates
- Consistent statewide values
- Transparent and collaborative process
- Useful and timely results
- Resource-efficient (time & money)
- Scalable model

Policy Advisory Committee

- **Stakeholder-based “board”**
- **Membership:**
 - Investor-owned and public utilities
 - Environmental and ratepayer advocates
 - EE industry and implementers
 - Regulators – both CEC and CPUC – and Independent System Operator
 - Local/regional organizations
- **Responsibilities:**
 - Approve charter, bylaws, and organizational policies
 - Approve business plan, budget, and work plan and review progress towards goals
 - Appoint Technical Forum members and hire Executive Director
 - Manage external relations

Technical Forum

- **Membership**

- Approximately 30 members based on RFQ process.
- Membership composed of academics, researchers, utility staff, consultants, etc.
- Balances technical expertise, sector experience, technology focus, policy and institutional background.
- National representation, e.g. CEE, ACEEE, DOE, LBNL, ASHRAE, other experts.
- Members selected and approved by Advisory Council.

- **Responsibilities**

- Initial scope of work is development of new measure workpapers .
- Scope includes development of affiliated resources, website, etc.
- Expanded scope TBD following pilot phase.

- **Decision-Making:**

- Consensus-oriented with “Comparison Exhibit” report on non-consensus items.

Managing Conflicts of Interest

- The Technical Forum Chair may not be a California program administrator, implementer or evaluator.
- Members may not vote on matters in which they have a direct financial interest.
- National members provide independent perspective.
- Majority of members non-IOU staff.
- Consensus-oriented with comparison exhibit report.
- Supermajority voting requirements for Advisory Council.
- Code of Independence pledge by Advisory Council, members, and staff.

Technical Forum Membership

- **Time commitment**
 - Review meeting materials (~ 4 hours/week)
 - Participate in day-long, monthly meetings (~ 6 hours/week)
 - Participate in technical sub-committees on specific technical issues
- **Initial term is one year**
- **Value proposition for Technical Forum members**
 - Learn about and help analyze new and innovative measures.
 - Recommend new measures for consideration in efficiency portfolios.
 - Meaningfully engage with other technical experts with a broad range of skills, experience, and perspective.
 - Contribute to national model for developing deemed savings values.
 - Opportunity to help shape future of Technical Forum.

Request for Qualifications (RFQ)

- RFQ was posted on March 28.
- Send request for RFQ to: TFMembers@CalTF.org
- Questions may be submitted until April 18.
- Responses due May 2 to: TFMembers@CalTF.org
- Application includes 1.) cover letter, 2.) resume, 3.) request for compensation (optional).
- TF Members selected by Advisory Council in May.
- First Cal TF meeting in June in San Francisco.

Summary

- CA Technical Forum – Summer 2014
- Consistent model for developing savings estimates for California and Pacific NW states.
- Rigorous, consistent, accurate, transparent, resource-efficient, credible process and results.
- A model for other states?