



## CUSTOM REVIEW WORKING GROUP MEETING 6/1/22

### Agenda

1. CalTF and eTRM background & context
2. Review proposed incorporation of custom processes into eTRM

### Meeting Notes

During today's meeting, Arlis Reynolds and Ayad Al-Shaikh of member company Future Energy Enterprises (FutEE) provided an overview of CalTF activities and provided a sneak preview of a proposed effort to eventually incorporate various custom processes into the eTRM.

Since relatively few folks attended the meeting and given the importance of this topic, we made a recording. Below is the access to recording:

Topic: Custom MWG (2022)

Start Time: Jun 1, 2022 10:58 AM

Meeting Recording:

[https://us06web.zoom.us/rec/share/9rtuuHv9EmgPKxKUi\\_DqvYgnWIMmFglVZfeMYbbfWd9\\_UlxEdiS9BdBYNeq4H9Kn.KTcNXHsXvchkYa60](https://us06web.zoom.us/rec/share/9rtuuHv9EmgPKxKUi_DqvYgnWIMmFglVZfeMYbbfWd9_UlxEdiS9BdBYNeq4H9Kn.KTcNXHsXvchkYa60)

Access Passcode: 3Kduh3%%

#### 1. CalTF and eTRM background & context

- The primary point of this discussion is to explore possible new opportunities for improvement with the Custom review process with FutEE, who is the primary contractor for CalTF.
- A pathway that has been considered for years now is for CalTF to front end the application process. This would be centralized, similar to how CalTF has accomplished this matter on deemed measures.
- Custom could be rolled into eTRM process over time.
- Resources: [caltf.org](http://caltf.org), [caetrm.com](http://caetrm.com)
- CalTF is funded by IOUs and POUs and overseen by the CPUC.
- There is a current RFQ for technical forum members:
  - Technical Forum membership: July 2022 - December 2023.
  - Applications due June 24, notice of selection: July 8.

- New measure is another piece that can start as “deemed” but can roll into custom.

## 2. Review proposed incorporation of custom processes into eTRM

- Principle includes statewide activities, branching across POU and IOUs.
- While CalTF embarks on addressing how to best incorporate custom processes into the eTRM for POU during this year, they are also exploring how to broaden this effort for IOU custom applications as well.
  - The CalTF team is aware of challenges with IOU custom processes, and they are looking for ways that those processes with accomplishments with POU.
- Leveraging eTRM for custom can provide a lot of benefits for custom programs. Three improvement groups: Overarching, workflow process, and project submittal quality.
- These improvements can lead to several benefits: cost savings, time savings, transparency, standardization, and stakeholder engagement and customer experience.
- Methods to anonymize data when posted?
  - PII listed as one of top three challenges to overcome. Something the group can do is control access to certain documents, so one implementer wouldn't see data for another implementer.
  - An ask for this group: examples of project documentation to help vet development of templates/intake structure for project data to simplify separating PII data from non-PII data.
- One of the biggest areas of contention is the interpretation from CPUC. Each IOU has a different level of interpretation of guidance. Two steps to integrating/creating new features for eTRM: design and implementation. Design process for a solution for clear requirements for a project submittal is agreeing what that standard is. Implementation: forcing into templates could take away subjectivity in reviewing that data.
- Concern that template cannot work for custom. There is another branch where there are projects that are repeatable and more numerous, and maybe start there.
- Important takeaway from this effort, there is still a way to standardize one-off cases. Utility administrators who don't have background to dive in, helps avoid rigid interpretations.
- Top challenge/question in initial discussions: PII, must find solution for idea of how much of custom could be templated. Also suspect a challenge for IOUs that they have historically managed custom processes. Several if not all have invested in internal systems to run processes. That will be a big question, how much does it make sense to consider pulling IOU review process into eTRM structure.
- What barriers should we be thinking about? What resonates?
  - How active has PUC been with this effort?
    - Thinking of this as a tool IOUs would use.

- Looking at how to extend eTRM features for custom as going through POU process. Having initial
- POU integration for custom should not be solely applicable to POUs. Hope to capture important attributes across the board, want this effort to work for IOUs as well.
- Would this ultimately supplant the CPUC's custom review process? Over time, would CPUC feel more confident it wouldn't need to do as many reviews, because of heightened confidence in results/applications.
- Custom eTRM wouldn't necessarily replace IOU process. Just streamlining opportunities. Each IOU would still review applications and make decisions on whether or not to take applications. That process would be standardized.
- The issue is how to interpret intentions and understand if a project would ultimately have been done by the customer anyways. It's uncertain because the project is a work in progress.

### **Next Scheduled Working Group Meeting**

Our next Custom Review MWG meeting will be Wednesday July 6<sup>th</sup> at 11:00 am. Call-in coordinates are below.

[Zoom link](#)

Call-in: +13126266799,,81257556437#

Passcode: cedmc2022