Minutes for Website Committee Conference Call

Wednesday, April 6, 2016, 2:00 PM PST

**Attendees**:

Shahana Samiullah – SCE

Loan Nguyen – SoCalGas

Mona Dzvova – CPUC

Tim Caulfield – Caulfield Consulting (Website Administrator)

**Absent:**

Cynthia Rogers – CEC

Rob Rubin – SDG&E

Brian Smith – PG&E

##### Executive Summary

The CALMAC Website Committee held an unscheduled conference call to address how to post Response to Recommendations to the CALMAC Searchable Database. Options for cross referencing CPUC work order numbers, or similar numbers, with the CALMAC Study IDs were discussed. Next call is scheduled for Wednesday, May 6, 2016 at 2:00 PM PDT.

**Minutes of Conference Call –** The conference call was called to order at 2:00 PM PDT.

*Discussion about posting Response to Recommendations* (RTR) – Two suggestions had been proposed: (A) Replacing the Non-Technical Overview document at the bottom of the main report with the RTR. (B) Adding the RTR as an appendix to the report.

Since this issue came up, one of the consultants working on posting the RTRs for SCG pointed out that on some occasions there will be more than one RTR per program. This fact pretty much eliminates the idea of using the Non-Technical Overview link, since there is only space for one report per link. After discussion, and demonstration of how it would appear on the report retrievals, **the Committee decided that the best option was post the RTRs as appendices to the respective reports**.

*CALAMC Study ID question* – Loan Nguyen wondered how the CALMAC Study IDs were issued and how they are structured. Tim Caulfield explained that they are issued on request from the study manager, and the only information required is the name of the study sponsor and the title off the cover of the report. The study sponsor is the entity who is requesting the study, or issuing the RFP for the work. Usually this coincides with who is paying for the study, but not always. The study sponsor is almost always one of the utilities or the CPUC. The title of the study report is used as a proxy for the “program” being studied. The use of the term “program” here is a generic term, covering both actual programs such as SCE 2016 Non Residential New Construction, but it also can cover study efforts such as a white paper on statewide new construction markets.

The CALMAC Study ID is structured as follows: AAA0000.00. The three letter alphabetical prefix is some alphabetic code indicating the entity sponsoring the study (e.g., SCE = SCE, CPUC is shortened to CPU, PG&E = PGE, SDG&E = SDG, SCG = SCG, etc.). The four digit number between the alphabetic code and the decimal point is intended to be unique to the “program”. For example, if the CALMAC Study ID is SCE1234 for the SCE 2016 Non Residential New Construction Program, then all studies done for that program would be posted using that study ID for that program. The individual study reports would be distinguished by the values of the two digit numeric code after the decimal point. So if there was an impact study, a process study and a market study for this hypothetical program, then the application of the individual CALMAC Study IDs might fall as follows:

SCE1234.01 – SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.02 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 1

SCE1234.03 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 2

SCE1234.04 – SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.05 – SCE 2016 Non Residential New Construction Process Evaluation Report – Appendices

SCE1234.06 – SCE 2016 Non Residential New Construction Market Evaluation Report

SCE1234.07 – SCE 2016 Non Residential New Construction Market Evaluation Report – Appendices

An important detail to explain is that CALMAC only issues or defines the first seven digits of the Study code (e.g., the SCE1234 portion), and the user defines the application of the values after the decimal point (SCE1234.01 etc.). This means that after the CALMAC Study ID is issued, the end user has quite a bit of freedom in applying the code to the various reports submitted to the database. For example, the end user could have chosen to use the following structure for the reports listed above:

SCE1234.01 – SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.02 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 1

SCE1234.03 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 2

SCE1234.10 – SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.11 – SCE 2016 Non Residential New Construction Process Evaluation Report – Appendices

SCE1234.20 – SCE 2016 Non Residential New Construction Market Evaluation Report

SCE1234.21 – SCE 2016 Non Residential New Construction Market Evaluation Report – Appendices

That structure might seem clearer to that particular end user. And indeed that application of the post decimal codes might make the posting of the RTRs that are posted later in the process appear more “rational” in terms of numbering. There is no reason that the post decimal codes need to be sequential. If RTRs were posted well after the reports were posted, under the first scenario they might appear as follows:

SCE1234.01 – SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.02 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 1

SCE1234.03 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 2

SCE1234.08 – Response to Recommendations for SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.04 – SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.05 – SCE 2016 Non Residential New Construction Process Evaluation Report – Appendices

SCE1234.09 – Response to Recommendations for SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.06 – SCE 2016 Non Residential New Construction Market Evaluation Report

SCE1234.07 – SCE 2016 Non Residential New Construction Market Evaluation Report – Appendices

SCE1234.10 – Response to Recommendations for SCE 2016 Non Residential New Construction Market Evaluation Report

Under the second post decimal numbering scenario they might appear as follows:

SCE1234.01 – SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.02 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 1

SCE1234.03 – SCE 2016 Non Residential New Construction Impact Evaluation Report – Appendices Volume 2

SCE1234.04 – Response to Recommendations for SCE 2016 Non Residential New Construction Impact Evaluation Report

SCE1234.10 – SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.11 – SCE 2016 Non Residential New Construction Process Evaluation Report – Appendices

SCE1234.12 – Response to Recommendations for SCE 2016 Non Residential New Construction Process Evaluation Report

SCE1234.20 – SCE 2016 Non Residential New Construction Market Evaluation Report

SCE1234.21 – SCE 2016 Non Residential New Construction Market Evaluation Report – Appendices

SCE1234.22 – Response to Recommendations for SCE 2016 Non Residential New Construction Market Evaluation Report

**The important point is the either approach to applying the post decimal code is fine. The approach to the application of the post decimal code is up to the end user.**

The advantage of the entire CALMAC Study ID structure is that all reports for a given “program” can be retrieve by typing the core Study ID, in this case SCE1234, into the Search Text box on the CALMAC Searchable Database page. Individual reports and their appendices can be pulled up together by typing in the CALMAC Study ID for the main report (e.g., SCE1234.01).

*Cross Referencing CPUC codes to CALMAC Study IDs* – The question was raised whether it was possible to somehow link CALMAC Study IDs to some other CPUC code. The purpose is to create a link to some of the work done before the final report. Several alternatives were discussed.

1. Use the CALMAC Study ID right from the start – The CALMAC Study IDs were always designed to be issued at the beginning of a study so that they could be applied to all documents as the study proceeded. In practice they have typically been issued at the time the final report is posted, but they could be applied to reports for the entire length of the study.

If there is a desire to use another numbering system and link those numbers to the CALMAC Study ID, then there are two possible approaches:

1. Voluntarily have submitters enter CPUC code – The CALMAC report submission form, and the CALMAC data base, already have a place where a submitter can list five separate “Other IDs”. These fields can accept any format, and are searchable. So if submitters were instructed to list a code such as the CPUC Work Order Number, they could be entered in this field. The weakness of this approach is that the data field is not mandatory, so if a submitter does not enter a value, the report will still be accepted by the submission process.
2. Add a mandatory field to the CALMAC database – CALMAC could relatively easily add a mandatory field to the database and the report submission form with a defined format. In this case the field would require an entry of the proper format before the report would be accepted by the submission process. The advantage would be that, going forward, the data field would be 100% populated, guaranteeing a link between the CPUC number and the CALMAC Study ID. The possible downside is that the submitters would need to know the CPUC number prior to being able to submit a report. Additionally, if there were studies that didn’t have a CPUC number, they would be rejected.

The Committee agreed that this information on linking study ID would be taken under advisement.

The conference call was ended approximately 2:40 PM PDT.