

Minutes for Website Committee Conference Call

Wednesday, May 10, 2017, 2:00 PM PDT

Attendees:

Mona Dzvova – CPUC
Cynthia Rogers – CEC
Brian Smith – PG&E
Tim Caulfield – Caulfield Consulting (Website Administrator)
Loan Nguyen – SoCalGas

Absent:

Shahana Samiullah – SCE
Jesse Enge – SDG&E

Executive Summary

The CALMAC Website Committee held a regularly scheduled conference call to discuss possible improvements to the Searchable Database page. Possibilities were discussed. Tim Caulfield will work on fleshing them out and bring back more information to the next conference call on July 12, 2017 at 2:00 PM PDT.

Minutes of Conference Call – The purpose this conference call was to discuss whether we could bring the CALMAC Searchable Database search interface page (1) more in line with current rolling portfolio language, and (2) less busy, if both can be achieved simultaneously.

Loan Nguyen had made some suggestions for adding categories. These were initially discussed in the attached memo from Tim Caulfield. Toward the end of the call they were discussed again, and were tabled for the moment, since no straight forward solution could be identified.

After some discussion about the “implementer” category, it was agreed that Tim Caulfield would discuss possible approaches and issues with Jeff Yip of Third Strand and would bring back recommendations to the Website committee at the next call. He would also look into what the data collection on how the search page is used is telling us, and would report back on that.

Tim Caulfield will:

- See how we might incorporate a field for Program Administrator
- Work with Jeff on how the data for a new Program Administrator field might be backfilled or whether a box might be pop up warning users that the “Program Administrator field was not in use before [insert date]”.
- Will work to analyze the new data on how people are using the Searchable Database interface.

The conference call was ended approximately 2:2:50 PM PDT. The next call is scheduled for July 12, 2017 at 2 PM PDT.

May 5, 2017

To: Website Committee
Fr: Tim Caulfield, Website Administrator
Re: Assessment of suggested changes to Search Interface

Summary: This memo summarizes the current set up of the Searchable Database interface, assesses the theory behind the layout of the interface, and then recommends against changing it and explains why.

Background: Loan Nguyen of SCG requested the addition to the CALMAC building sectors in line with D. 15-10-028 (see attached copy of Email).

When the Website Committee set up the current interface in 2001 it discussed the anomaly of New Construction as a building sector and then chose not to address it by creating a “Program Type” selection box. The argument was that New Construction was actually a “Building Sector”. As a participant in those discussions I disagreed, but was over ruled. The issue of program type was, at that time, seen as a simple choice between Energy Efficiency and Demand Response. Over the years it was realized that two other program types were needed, Low Income and Self Generation, which were included by inserting additional check boxes at the top at the top of the search page, along with the two original check boxes. This resulted in the current Searchable Database interface, replicated in the screen capture presented on the next page. (Note: “Publication Types” equal program types.) The Excel image presented below illustrates, in a grid fashion, the fundamental layout of the current Searchable Database matrix.

Sectors (AKA - Building Sectors)	Agriculture	Commercial	Industrial	New Construction	Residential
Categories (AKA - Types of Evaluations)					
Evaluation Guidelines					
Impact Evaluation					
Market Effects					
Market Study					
Measure Retention					
Program Design					
Program Type (AKA - Program Target)					
Energy Efficiency					
Demand					
Low Income					
Self Generation					

Screen Capture of Current Searchable Database Interface

Searchable Database

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Help file includes hints for first time visitors

Search Text:

(optional)

Title, Authors (Evaluators), Abstract, Category, Sector, program number and Study IDs will be searched.
This Search Engine currently allows the use of only the following boolean operators:
and, +, or, not, -, " " and nested searches with the use of parentheses ()

Search Type: Partial Word Search Whole Word Search

Filter Search By:

Publication Types:

Energy Efficiency Demand Response Low Income Self Generation

Categories:

Evaluation Guidelines
Impact Evaluation
Market Effects
Market Study
Measure Retention

[ALL](#) [CLEAR](#)

Primary Author (Entity):

AAG & Associates
ACEEE
ADM
Aloha Systems
Alternative Energy Systems Consulting, Inc. (AESC)

[ALL](#) [CLEAR](#)

Sectors:

Agricultural
Commercial
Industrial
New Construction
Residential

[ALL](#) [CLEAR](#)

Implementers:

ADM
AESC Inc.
Alliance to Save Energy
American Synergy Corporation
Association of Bay Area Governments

[ALL](#) [CLEAR](#) [Acronyms](#)

Publication Dates:

From:

(earliest: 1/18/1990)

To:

(latest: 4/17/2017)

[ALL](#) [CLEAR](#)

Program Years:

From:

(YYY)

To:

(YYY)

[ALL](#) [CLEAR](#)

Sort Search By:

- Publication Dates
 Program Years

Discussion: In the Excel layout above I have highlighted, in yellow, the New Construction building type, because I believe that when it is presented this way it becomes more apparent that New Construction is an outlier in the building type category. Indeed, it is actually a program type, meant to address new construction issues for all of the other building types. Under the current structure, in my opinion,

the following layout would make more sense, with one simply selecting or checking more than one program type:

Sectors (AKA - Building Sectors)	Agriculture	Commercial	Industrial	Residential
Categories (AKA - Types of Evaluations)				
Evaluation Guidelines				
Impact Evaluation				
Market Effects				
Market Study				
Measure Retention				
Program Design				
Program Type (AKA - Program Target)				
New Construction				
Energy Efficiency				
Demand				
Low Income				
Self Generation				

And then if one chose to codify more program types, as suggested by Loan, then the structure of the database might expand to be represented as in the following diagram:

Sectors (AKA - Building Sectors)	Agriculture	Commercial	Industrial	Residential
Categories				
(AKA - Types of Evaluations)				
Evaluation Guidelines				
Impact Evaluation				
Market Effects				
Market Study				
Measure Retention				
Program Design				
Program Type				
(AKA - Program Target)				
New Construction				
Cross Cutting (all bldg sectors)				
Codes and Standards				
Emerging Technologies				
Training and Education				
Energy Efficiency				
Demand				
Low Income				
Self Generation				

As one can see, in this structure, “Cross Cutting” is sort of an outlier because it is not a true program type, it is simply a program type that addresses multiple building sectors.

Arguments Against Changing Searchable Database Interface: Much of the point of the previous discussion is to illustrate that as trends occur, there is always a tendency to want to customize the database to the most current trend. At one time it was market transformation, then something else, now cross-cutting. If you look back at the original matrix, the one as it currently exists, you can see, even with the anomaly of New Construction, there is a simplicity to it that reflects the fact that the original layout got at the basic building blocks of the evaluation/building type/program type structure. When constructing databases this is the most important principle, to have your data at the elemental level. Similarly, when you examine the grid immediately above, it becomes apparent that elemental level issues (Energy Efficiency, Demand Response, Low Income, Self Generation) are being mixed with second tier program definitions (Codes and Standards, Emerging Technologies and Training and Education) while the concept of Cross Cutting is simply that the program address all building types.

However, all that having been said, the main argument for not changing the Searchable Database structure is that, as it is currently, it already addresses the submitter and the searchers’ needs.

The Searchable Database interface is set up at two levels (1) the Text Search, and (2) the Filter Search.

The Text Search allows maximum flexibility for both the submitter and the searcher. The submitter can enter whatever key words they wish in the Abstract and the Search Text function will pull up the report. In addition, the Search Text function searches all fields in the database. This is why it doesn't really matter where the New Construction category appear in the matrix, whether under building type or program type.

The Filter Search functions simply allow you to select the predetermined categories and filter out the other predetermined categories.

There is another reason not to change the current Searchable Database interface structure without a really strong reason, and that is that as of March 13, 2017 there were unique 1,206 studies in the CALMAC Searchable Database. If we start adding categories, we need to somehow deal with going back and filling in the data for those already existing studies.

Recommendation: While I try to remain open to change that will improve the user experience, I don't believe that we should change the database in response to the SCG request. I don't see any particular added ability to retrieve reports, and I think that the current search function servers the user well.

to webcom

Hi Tim,

I have an agenda:

Do you have more detail information on how people do their search? This could streamlined the Filter by eliminating some boxes that contain outdated information (e.g. implementers, primary author).

Also, what's the possibility of aligning the Sectors into the following categories according the D. 15-10-028?

- Agricultural
- Commercial
- Cross-Cutting Codes & Standards
- Cross-Cutting Emerging Technologies
- Cross-Cutting Workforce Education & Training
- Industrial
- Public
- Residential