

Guy Norman
Chair
Washington

KC Golden
Washington

Jim Yost
Idaho

Jeffery C. Allen
Idaho



Northwest **Power** and **Conservation** Council

Doug Grob
Vice Chair
Montana

Mike Milburn
Montana

Ginny Burdick
Oregon

Louie Pitt, Jr.
Oregon

October 5, 2022

DECISION MEMORANDUM

TO: Council members

FROM: Jennifer Light
Director of Power Planning

SUBJECT: 2023 RTF Work Plan

PROPOSED ACTION: Staff is seeking approval of the 2023 RTF Work Plan

SIGNIFICANCE: The RTF works on a calendar year and is supported primarily by separate Bonneville and regional utility funding. Under the RTF's charter, the Council has authority for approving the RTF's work plan and budget, with input from the RTF Policy Advisory Committee and interested parties. Staff is seeking approval of the 2023 Work Plan.

BUDGETARY/ECONOMIC IMPACTS

The RTF is primarily funded by regional utilities and Bonneville. The Council does contribute staff time in the form of RTF assistance, technical support from Power Division staff, and finance, legal, and IT support. The Council also provides office and meeting space for the RTF. Approval of the 2023 RTF Work Plan does not change these current levels of support.

BACKGROUND

Staff is seeking Council approval of the 2023 RTF Work Plan and Budget. Staff will present an overview of the proposed 2023 RTF Work Plan, and the proposed Business Plan and Work Plan documents are attached.

The Council chartered the RTF as an advisory committee to the Council in 1999, in response to the 1996 Congressional mandate and recommendations from the 1997 Comprehensive Review of the Northwest Energy System. The Congressional mandate directed Bonneville Power Administration and the Council to “convene a regional technical forum to develop consistent standards and protocols for verification and evaluation of energy savings, in consultation with all interested parties,” and the directive further stated that the RTF’s services should be available to all Northwest utilities. Since 1999, the RTF workload has grown, as has the budget. In 2010, the Northwest Energy Efficiency Taskforce recommended that the RTF operations and budget be reviewed by a high-level committee to improve the operations of the RTF and to put it on a stable long-term funding basis. In response, the Council chartered the RTF Policy Advisory Committee (PAC) as an advisory committee to the Council, which has advised the Council on funding and policy related matters and worked to secure stable funding for the RTF.

In 2019, the RTF PAC agreed to a five-year funding agreement (2020-2024) with a \$1.8 million budget in 2020, escalating to \$1.99 million by 2024 to account for inflation. The RTF PAC further agreed to managing the next cycle as a five-year budget, where unspent funds can be rolled over to a future year to complete RTF work. Additionally, the RTF PAC agreed to use \$167,000 in unspent electric funds from the early years of the RTF to further support work during the 2020-2024 business cycle. Annual approval of the work plan is still necessary.

The proposed 2023 Work Plan and Budget represents the fourth year of the five-year agreement. A draft work plan was presented to the RTF in July 2022, which initiated a 30-day stakeholder comment period. Staff received comments from CLEAResult focused on suggestions for specific tasks already within the work plan, and after consideration staff felt the budget levels assumed for those tasks were sufficient. Staff also had conversations with the Energy Trust of Oregon that identified a new project that staff included in the proposed work plan. At its September 20 meeting, the RTF adopted the work plan with recommendation to the Council for approval. The RTF PAC met on September 28 to review the proposed work plan. A positive recommendation from the RTF PAC is included in the Council packet.

The proposed 2023 budget is \$2.19 million. This budget includes the agreed to funding for 2023 (\$1.94 million) and \$250,000 of additional unspent funds from 2020-2022. Staff believes this is adequate to support the level of work expected to be feasible in 2023. This includes ensuring focus on the core work of measure development and maintenance, while tackling several projects in support of broader understanding around energy efficiency and demand response savings, costs, and benefits.

ATTACHMENTS

RTF 2020-2024 Business Plan, Updated for the 2023 Work Plan

Proposed Detailed [2023 Work Plan](#) (Excel)

Recommendation Memo from the RTF Policy Advisory Committee Co-Chairs



**Regional
Technical Forum**

Regional Technical Forum 2020-2024 Business Plan

**Updated for the 2023 Work Plan
Proposed: September 12, 2022**

Introduction

The Regional Technical Forum (RTF) is an advisory committee to the Northwest Power and Conservation Council (Council). The RTF meets monthly to review analysis and make decisions on methodologies for estimating energy efficiency savings and demand response impacts. The RTF is supported by Council staff and outside contractors that manage the workflow and conduct technical analysis. This document describes the RTF's role, funding, operations and staffing, and planned activities for the 2020-2024 period. It has been updated to reflect refinement in the business plan based on the work completed in 2020-2022 and the anticipated needs for 2023.

Role of the RTF

The RTF was formed in 1999 as an advisory committee to the Council in response to a directive from Congress (1996) and the 1996 Comprehensive Review of the Northwest Energy System. The primary roles of the RTF have been, and continue to be:

- Developing and maintaining a readily accessible list of eligible conservation resources, the estimated lifetime costs and savings associated with those resources, and the estimated regional power system value associated with those savings;
- Establishing a process for updating the list of eligible conservation resources as technology and standard practices change, and an appeals process through which utilities, trade allies, and customers can demonstrate that different savings and value estimates should apply;
- Developing a set of protocols by which the savings and system value of conservation resources should be estimated with a process for applying the protocols to existing or new measures;
- Assisting the Council in assessing: 1) the current performance, costs and availability of new conservation technologies and measures; 2) technology development trends; and 3) the effect of these trends on the future performance, cost and availability of new conservation resources;
- Tracking regional progress toward the achievement of the region's conservation targets by collecting and reporting on regional research findings and energy savings annually.

For the 2020-2024 funding cycle, the RTF will expand upon its core mission to include:

- Developing and maintaining a list of natural gas and dual fuel energy efficiency resources, including methodologies for estimating lifetime energy savings and costs associated with those resources, and a process for updating those estimates as technology and standard practices change
- Conducting technical analysis on technologies that provide both energy efficiency and demand response potential to assist the Council in assessing the technical potential of the technologies



Funding

The RTF is funded by Bonneville, the Energy Trust of Oregon, investor-owned utilities, and large generating public utilities in the region. The RTF Policy Advisory Committee (RTF PAC) established funding levels for 2020-2024 based on the planned activities described below in more detail. The proposed funding level for the five-year period is \$9,461,300, starting out at \$1.8 million in 2020 and increasing annually at 2.5% to account for inflation. The five-year funding period provides a level of consistency to ensure long-term goals of the RTF are sufficiently supported, while providing flexibility to meet regional needs on an annual basis.

The RTF PAC agreed to use the allocation method developed by the Northwest Energy Efficiency Alliance (NEEA) for funding. The RTF PAC further agreed to the following methodology for sharing costs across the electric and gas utility funds:

- Electric ratepayer dollars are allocated to work that is intended to solely support electric demand side management programs (ex: electric-only energy efficiency measures and demand response)
- Gas ratepayer dollars are allocated to work that is intended to solely support natural gas programs (ex: gas-only efficiency measures)
- Costs will be shared for work that is intended to support all ratepayers (ex: dual fuel measures, tool development, and overhead) with 75 percent allocated to electric ratepayer dollars and 25 percent to gas ratepayer dollars

The resulting funding shares are as follows:

Table 1: Funding Shares and Five-Year Contribution

Organization	Proposed Funding Share	Total 5-Year Contribution
Bonneville Power Administration	30.03%	\$2,841,100
Energy Trust of Oregon	22.54%	\$2,132,800
Puget Sound Energy	18.99%	\$1,796,500
Idaho Power Company	7.54%	\$713,300
Avista Corporation, Inc	6.78%	\$641,400
PacifiCorp (Washington)	2.08%	\$197,200
PacifiCorp (Idaho)	1.78%	\$168,200
NorthWestern Energy*	1.70%	\$161,000
Seattle City Light	2.86%	\$270,800
PUD No 1 of Clark County	1.02%	\$96,800
Tacoma Power	0.77%	\$73,200
Snohomish County PUD	0.54%	\$51,400
Eugene Water and Electric	0.17%	\$16,500
Chelan County	0.81%	\$76,700
PUD No 1 of Cowlitz County	0.15%	\$14,500
Cascade Natural Gas	1.66%	\$157,000



NW Natural	0.56%	\$52,900
Total	100.00%	\$9,461,300

*NorthWestern Energy share adjusted to 52% of NEEA allocation share.

The RTF PAC agreed to manage the funding as a five-year budget, by applying any unspent and unallocated funds from previous years to later years. At the end of the five-year period, any unspent funds will be credited back to the funders.

In addition to the agreed to funding for this work plan cycle, the RTF PAC considered how best to apply funds that were not spent or returned from the early years of the RTF prior to the implementation of formal funding agreements. The carryover funding from previous cycles totals \$167,732. The RTF PAC agreed to apply these funds to additional work in this 2020-2024 Business Plan cycle for a total five-year budget of \$9,629,032.

Operations and Staffing

The RTF is an advisory committee consisting of 20-30 voluntary members. The Council appoints the membership to ensure a fair balance in technical expertise for successful completion of the work plan. The RTF as a body meets approximately once a month for a full-day meeting at the Council’s main office in Portland, OR.

To reduce the burden placed on the voluntary members, the RTF budget supports funding for one full-time manager and contracted technical support. The RTF Manager is a Council employee whose responsibility is to oversee day to day operation of the RTF. This includes developing and managing work plans, managing contracts, developing quarterly and annual reports, and interfacing with the Council. Approximately 10 percent of the RTF budget goes to this function.

The largest portion of the budget (around 50 percent in 2023) supports a team of dedicated contract analysts that conduct the bulk of technical analysis on behalf of the RTF. The RTF transitioned to this team approach from one-off contracts as a way of ensuring greater consistency in analysis across work products and providing flexibility in workflow for achieving annual work plan goals. The 2020-2024 funding levels are sufficient to support up to six contract analysts annually.

The remaining 40 percent of the budget is set aside for specific contracts in support of work plan goals. This work generally falls into one of the following categories: 1) contracting with a firm to act as a third party for quality control review, 2) supporting members attendance at meetings, and 3) expanding the technical capabilities of the team for specific projects or tool development.

Council Contribution

In addition to the funding described above, the Council contributes staff time and office and meeting space to the RTF. From a staffing perspective, the Council contributes staff to operation, coordination, technical analysis, contracting and legal assistance, and other administrative tasks. These staff contributions are estimated in the table below. The exact estimates will be updated annually to reflect prior year rollover of funds, application of carryover from previous cycles, and any shifts across categories.



Table 2: Annual Funding Levels

	2020	2021	2022	2023	2024
Contract RFP	\$433,000	\$431,400	\$412,900	\$440,400	\$436,000
Contract Analyst Team	\$1,193,000	\$1,235,200	\$1,295,400	\$1,310,600	\$1,358,700
RTF Manager	\$174,000	\$178,400	\$182,800	\$187,400	\$192,100
Annual Funding	\$1,800,000	\$1,845,000	\$1,891,100	\$1,938,400	\$1,986,800
Council Staff Contribution	\$185,600	\$190,300	\$195,000	\$199,900	\$204,900

Activities and Budget

The specific tasks contained in this business plan are driven by existing measure work, anticipated growth for new measure requests, and expectations for future analysis tied to regional research or planning efforts. The specific work in any calendar year is largely driven by the existing measure needs and any requests received from parties within the region, primarily utilities, Bonneville, the Energy Trust of Oregon, NEEA, and Council staff. The RTF solicits topics from stakeholders through an annual request as part of the work planning and through an online form for proposing new measures. Each year, the RTF typically adjusts the allocation of resources among the categories in its work plan based on requests received, proposals, and the pace of multi-year projects. The RTF notifies the Council and its funders of all significant reallocation of resources or priorities. Table 3 provides an overview of the anticipated allocation of work for the 2020-2024 business plan cycle, and Table 4 provides a detailed breakdown of activities for 2023. Annual changes in Table 3 budgets represent anticipated shifts in work between measure analysis and other analytical support through tools and regional coordination. More details on those shifts are provided below.

Table 3: Strategic Plan Funding, by high level category, excluding Council contribution

Subtotal Funders	2020	2021	2022	2023	2024
Measure Analysis	\$971,000	\$916,300	\$883,500	\$928,400	\$1,029,900
Tools and Regional Coordination	\$275,000	\$360,800	\$425,600	\$413,500	\$345,400
Demand Response	\$50,000	\$51,200	\$52,500	\$53,800	\$55,200
RTF Management/Administration	\$504,000	\$516,700	\$529,500	\$542,700	\$556,300
Total	\$1,800,000	\$1,845,000	\$1,891,100	\$1,938,400	\$1,986,800



Table 4: Proposed 2023 Budget Levels

Category	Contract RFP	Contract Analyst Team and Manager	Total Funder Contribution	Council Contribution	% of total
Existing Measure Maintenance	\$90,000	\$340,000	\$430,000	\$13,090	20%
New Measure Development	\$35,000	\$294,500	\$329,500	\$6,160	15%
Standardization of Technical Analysis	\$45,000	\$125,000	\$170,000	\$0	8%
Tool Development	\$213,300	\$60,000	\$273,300	\$2,500	12%
Regional Coordination	\$245,000	\$145,000	\$390,000	\$16,000	18%
Demand Response	\$40,000	\$53,800	\$93,800	\$10,000	4%
Regional Conservation Progress	\$60,800	\$0	\$60,800	\$45,000	3%
RTF Meeting Support	\$135,000	\$107,000	\$242,000	\$10,000	11%
RTF Management	\$7,000	\$192,000	\$199,000	\$66,500	9%
Total	\$817,100	\$1,317,300	\$2,188,400	\$169,750	100%

As of September 12, 2022, staff estimates around \$190,000 of unspent/unallocated funds from 2020-2022. Additionally, \$167,732 of carryover funds (all electric) from early years of the RTF remain unspent. The primary drivers for unspent funds are:

- Reduction in meeting costs in 2020 and 2021 due to Covid-19
- Reduction in contract analyst team workflow in 2020 as the team adjusted to Covid-19 impacts
- One contract analyst leaving the RTF mid-year in 2021, resulting in roughly 45 percent of the contract unspent
- Decision not to pursue project on savings shape development in 2021 (\$100k), as it relies heavily on the regional end use load metering and would benefit from a longer metering period to better account for post-Covid-19 “normal”

Included in Table 4, is an increase to the original agreed to amount. This reflects the application of \$250,000 in rollover funds (\$237,500 electric, \$12,500 gas) to work planned for 2023. The additional funds are specifically tagged for contract RFP work and identified in more detail below.

Measure Analysis

Approximately 50 percent of the five-year budget is anticipated to directly support measure analysis. This includes maintenance of the existing measure library, the addition of new measures, and activities associated with ensuring consistency in analysis approach across the entire measure suite.

Existing Measure Maintenance

One half of the measure analysis work is focused on the maintenance of existing measures. The pace of existing measure review and update is driven by the sunset dates of measures.



The RTF assigns sunset dates that range from one to five years based on the specific circumstances of a measure. For example, the RTF typically applies shorter sunset dates for measures in markets that are changing rapidly to keep pace with that change, whereas it applies longer sunset dates to more stable markets and measures. Other factors that will impact sunset dates are anticipated updates to Federal or state codes and standards, updates to ENERGY STAR specifications, or anticipation of new data. The number of anticipated measures sunset or otherwise requiring review in any given year of the funding cycle ranges between 16 and 26 measures. This assumption is in line with the 2015 to 2018 funding cycle, during which time the number of existing measures considered in any year ranged from 15 to 30.

The 2023 work plan assumes updates to 17 of its existing measures. This is driven by the sunset dates of 13 electric measures and 5 dual fuel measures. The work includes measure review and update by the contract analyst team and quality control/quality assurance review by an outside contractor. For 2023, the RTF anticipates potentially relying on RFP contracts for updates to at least one measure.

New Measure Development

The RTF is continually seeking ways to provide value to the region's utilities. As efficiency programs are successful in transforming markets, emerging technologies are going to be important for meeting future efficiency goals. To support this need, the RTF is allocating approximately 15 percent of its five-year budget to assessing new measure opportunities. The estimate of new measure work varies each year, with the anticipation of between six and nine new measures annually. The exact number of measures in any given year is highly uncertain, as it is driven primarily by utilities' needs. For reference, the RTF developed between two and nine new measures in any given year of the 2015 to 2019 funding cycle.

The 2023 work plan assumes development of eight new measures. There are several potential new measures in the RTF queue, and prioritizing funding on development of these measures will help to expand the RTF library in support of regional efficiency program needs. This assumes five new electric, one new dual fuel, and one new gas measures. This also assumes that the RTF will continue to focus some effort on providing guidance for reliable savings estimation of complex programs.

Standardization of Technical Analysis

The RTF has made attempts over the last several years to improve the consistency of its analysis across measures. Key to this was the development of Operative Guidelines and the establishment of a dedicated contract analyst team to perform the majority of the technical analysis. As part of the 2020 to 2024 funding cycle, the RTF is allocating approximately 15 percent of its five-year budget to ensuring thorough and consistent analysis across all its categories.

The largest portion of this work is to support coordination and review across the contract analyst team. This work primarily takes place in the weekly contract analyst team meeting, during which the team reviews each other's analysis, develops recommendations to the RTF for consideration, and explores new analytical techniques.



Another piece of this work is the maintenance of the RTF Operative Guidelines and its Standard Information Workbook. The RTF is anticipating updates in 2023, focused primarily on considering guidelines on the inclusion of equity metrics in evaluation. This work would be in support of an action item directed at the RTF in the Council's 2021 Power Plan. The Standard Information Workbook includes assumptions that are used across efficiency measures, including some assumptions around measure costs. The RTF will review the workbook for necessary updates in 2023.

Support of Small and Rural Utilities

The RTF allocates a small portion of its new measure development (\$40,000 annually, plus inflation) to support the needs of region's small and rural utilities. For 2023, this effort will be fully supported through one contract analyst's time. The work includes supporting a standing subcommittee that discusses the applicability of existing RTF measures to small and rural utilities and explores potential refinements to measures to better meet their specific needs. This work also includes the development of new measures of specific interest to small and rural utilities that might not otherwise get developed for the RTF.

Tool Development

The RTF maintains a handful of tools to support measure development, including its cost-effectiveness tool (ProCost) and building simulation models to estimate energy savings. For the 2020 to 2024 funding cycle, the RTF is allocating approximately 7 percent of its five-year budget to this function. The annual funding level varies, as much of the work is tied to other regional efforts. Additionally, the RTF will spend more time on tool development when there are fewer measures requiring update or development.

ProCost

The RTF uses and maintains the Council's cost-effectiveness tool. Given this, the ProCost development work is closely tied to the Council's regional planning cycles. In 2021 and 2022, the RTF pursued significant updates to ProCost that streamlined code, increased transparency, and improved functionality. The timing was to align with the Council's 2021 Power Plan. With these updates complete, the RTF assumes only minimal support in 2023.

Building Simulation Models

The RTF uses building simulation models for estimating energy savings in residential and commercial buildings. Currently, the RTF uses SEEM¹ for modeling residential single family, manufactured homes, and low-rise multifamily buildings and uses EnergyPlus² to model

¹ The Simplified Energy Enthalpy Model (SEEM) is developed and maintained by Ecotope. More information, and the latest version of SEEM, can be found on the RTF's website: <https://rtf.nwcouncil.org/simplified-energy-enthalpy-model-seem>.

² EnergyPlus is a whole building energy simulation program developed by the Department of Energy. The RTF uses and adapts the building prototype models to better reflect buildings in the Pacific Northwest, based on regional data from NEEA's Commercial Building Stock Assessment.



commercial buildings. Much of the efforts in 2020 through 2024 are focused on ensuring that these models are well calibrated to the region’s building stock.

In 2020-2022, the RTF focused on enhancing its commercial EnergyPlus models, leveraging the latest NEEA Commercial Building Stock Assessment for calibration and enabling more robust modeling of building energy. The RTF started using these models for measure analysis in 2021 and plans to continue this work going forward. In 2023, the RTF plans to continue to align these models to regional data to support savings shape development and measure analysis. The RTF is also proposing to apply \$150,000 of carryover funds to support focused efforts on multifamily and other complex models.

In 2020 and 2021, the explored alternative modeling tools or enhancements to improve its residential model for energy efficiency and demand response analysis. The outcome was a recommendation to pursue EnergyPlus for at least a portion of the residential work. A primary driver for this recommendation was the capabilities for enhanced demand response modeling and better interactive modeling between energy efficiency and demand response opportunities. In 2022, the RTF started to develop a front end that will best meet its needs into the future. This work is anticipated to continue into 2023. (Because these model enhancements are in part driven by the need to better model demand response opportunities, all work on the residential building model is assumed to be 50% demand response and 50% dual fuel efficiency funding).

Regional Coordination

The RTF does not have funding for the primary research required to inform its savings analysis. Rather, the RTF relies on Bonneville, NEEA, the Energy Trust, the region’s utilities, and others to conduct this primary research. The RTF has allocated approximately 9 percent of its five-year budget to coordinating with those regional entities to help inform research, identify opportunities to leverage that research for RTF analysis, and connect RTF analysis to regional efforts. As with its tool development efforts, the annual workflow varies to better coordinate with regional efforts, while also providing a balance in the RTF workload when there are fewer measures requiring updates or development.

Research Coordination

The RTF’s contract analysts are expected to coordinate with regional entities to help inform regional research. This includes working with specific utilities on defining upcoming research needs that might support RTF measure development and discussing the outcomes of the research to inform measure analysis. As directed by interested research funders, the contract analysts can support coordination of joint research projects funded by utilities in support of RTF analysis.

The RTF also allocates a portion of contract analyst time to help inform regional studies, such as the NEEA stock assessments. The RTF supports contract analyst time for engagement in the Residential Building Stock Assessment work group, which provides guidance throughout the design and implementation of the study.



Market Analysis Review

The RTF, Council, and efficiency programs rely on market intelligence to inform baselines and program design. Over the last several years, Bonneville and NEEA have dedicated more resources to studying markets. During the 2020 through 2024 business cycle, the RTF will allocate resources to engagement in this research. The goal of this effort is to understand available data, provide recommendations on data analysis, weigh in on uncertainty around market factors, and support estimation of total market consumption.

Savings Shape Development

Over the last few years, the region has increased its focus on understanding when energy efficiency measures save energy to inform how energy efficiency can provide capacity benefits. The RTF reviewed its existing load profiles to understand the relative quality of profiles and where better data are needed to improve our understanding of the timing of savings. The region has also launched residential and commercial end use metering studies to collect more data on energy use. In this business plan, the RTF has allocated resources to using the results of the end use metering studies (and other data sources as available) to develop end use load profiles and measure savings shapes. The bulk of this work is anticipated to occur in the latter half of the funding cycle, as the data come in and in preparation for the Council's ninth power plan.

In 2023, the RTF plans to continue to enhance its savings shape library, in part by leveraging unallocated funds. This work will leverage the RTF's EnergyPlus models, the regional end use load research, and other data.

Council Plan and Other Regional Support

Being an advisory committee to the Council, one of the roles of the RTF is to provide technical support and analysis on energy efficiency measures. Most of this work is directly tied to the Council's power planning efforts. The Council's 2021 Power Plan was finalized in early 2022. The RTF does not anticipate needing to allocate time in 2023 to support Council work. More work is anticipated, however, in 2024.

In addition to supporting power planning analysis, the RTF has often been called upon to conduct technical studies on energy efficiency. For the 2020 to 2024 funding cycle, the RTF has allocated funding to support such a study. The 2021 Power Plan directed RTF to support the valuation of resiliency and flexibility, which will be used in future planning analysis. This work started in 2022. The RTF anticipates continuing this work, specifically focused on flexibility and the energy efficiency and demand response interface, in 2023. The RTF is also planning a project focused on exploring electric vehicle efficiency with a goal of informing future RTF measure development.

Demand Response

The RTF has allocated 3 percent of its budget annually to support technical analysis on demand response technologies. The RTF will specifically look at technologies that provide both energy efficiency and demand response opportunities, as a way of leveraging the RTF's existing knowledge and thinking about these opportunities holistically. The RTF analysis will focus on technical considerations of the technologies, estimating the technical, per unit demand impact



potential for technologies, absent any specific product design considerations. The purpose of this work is to be an input, of many, into Council and utility demand response supply curves.

The work in the 2020 to 2024 funding cycle builds upon the RTF’s scoping effort in 2019. In 2020 through 2022, the focus of the work is on enhancing the RTF’s analytical capabilities, including exploring enhancements to existing building simulation models or alternative modeling approaches. As described above, the work in 2023 focuses on finalizing a residential EnergyPlus work and starting to update its demand response analysis

RTF Management

The final 28 percent of the budget is allocated to management of the RTF, including support for RTF meetings and the RTF Manager. This also includes management of the Council’s Regional Conservation Progress survey.

Regional Conservation Progress Report

Per its charter, one of the roles of the RTF is to track the region’s progress against the Council’s power plan targets for energy efficiency. This is done through the annual Regional Conservation Progress (RCP) survey and report. Every year, the RTF collects data from Bonneville, Energy Trust, NEEA, and the region’s utilities on the energy efficiency savings and expenditures from the previous year. The 2020 to 2024 funding cycle allocates \$50,000 annually, plus inflation, to contract out the data collection and analysis. This budget assumes that the RTF Manager, in coordination with other Council staff, will be responsible for compiling the results into a final report for the Council.

Meeting and Member Support

The RTF meets approximately monthly for a one-day meeting. It is at these meetings where the formative work of the RTF occurs. Given the importance of these meetings, the RTF allocates approximately 15 percent of its budget to supporting this function. The most significant portion of this budget is ensuring that all the members and contract analysts are able to attend and participate in the monthly meetings in person. As noted above, the RTF members serve in a voluntary capacity. To ensure that all members can attend the meeting in person, the RTF supports travel costs and participation for some of the members. Additionally, several of the contract analysts have traditionally lived outside of Portland. Part of contract costs for these analysts includes the travel and time for attending the RTF meetings.

The RTF also allocates a small portion of the budget to contract out for meeting minute services, as well as phone lines and web conferencing. Each of these components is important to ensuring that the RTF meetings are publicly available, including to those that are unable to travel or attend a specific meeting.

The 2023 budget assumes that RTF meetings will be a mix of virtual and in person meetings.

Management and Administration

The final 10 percent of the RTF annual budget goes to support RTF management and administration. This is primarily the support of the RTF Manager, who provides the day-to-day management of the RTF.



Guy Norman
Chair
Washington

KC Golden
Washington

Jim Yost
Idaho

Jeffery C. Allen
Idaho



Northwest Power and Conservation Council

Doug Grob
Vice Chair
Montana

Mike Milburn
Montana

Ginny Burdick
Oregon

Louie Pitt, Jr.
Oregon

October 5, 2022

MEMORANDUM

TO: Council Members

FROM: Ginny Burdick, Co-Chair, RTF Policy Advisory Committee
Debbie DePetris, Co-Chair, RTF Policy Advisory Committee

SUBJECT: Recommendation for approval of the RTF 2023 Work Plan and Budget

The RTF Policy Advisory Committee (RTF PAC) recommends approval of the 2023 RTF Work Plan and Budget. The work plan and budget reflect a scope of work and level of effort that was agreed to by all funders and supported through our five-year funding agreements for 2020 through 2024.

Most of the work plan focuses on the core strengths of the RTF over the past 20 years: developing electric energy efficiency savings estimates and methodologies for use in the region's efficiency program planning and evaluation. In addition, this work plan continues efforts to analyze natural gas energy efficiency savings. The work plan also expands its focus on demand response opportunities, with particular focus on understanding, and in turn properly accounting for, the full interaction of costs and benefits between energy efficiency and demand response opportunities. The 2023 Work Plan also identified other important projects that continue to improve our analysis of energy efficiency, including following recommendations identified in the Council's 2021 Power Plan and developing technical analysis that will support utility integrated resource plans and future Council planning.

The RTF PAC agrees that the funding levels are appropriate and sufficient to support the work of the RTF in fulfilling its directive and meeting the needs of regional utilities. The RTF PAC appreciates the opportunity to offer this recommendation to the Council and respectfully requests the Council's approval of the 2023 Work Plan and Budget.

2023 RTF Work Plan and Budget

October 11, 2022
Council Meeting

Purpose

Seeking Council decision on the
2023 RTF Work Plan and Budget



RTF Activities Outlined in Charter

Develop and maintain measure library with savings, lifetime costs, and estimated value to power system



Establish a process for updating list of resources and an appeals process for demonstration of different values

Develop set of protocols by which savings and system value should be estimated

Assist the Council in assessing measures, technology development trends, and effect of trends on future performance and availability of resources

Track regional progress toward meeting Council targets annually

Conduct technical analysis of potential for technologies that provide both energy efficiency and demand response

3

Values of the RTF

- Leverages the work across the region to reduce the individual burden on any one utility
- Brings together thirty, unbiased, technical experts to analyze the data and provide recommendations
- Uses a public process to bring transparency, as well as additional ideas and expertise, to the analysis
- Removes some of the friction between utilities and regulators when estimating and claiming savings

4

RTF Funding

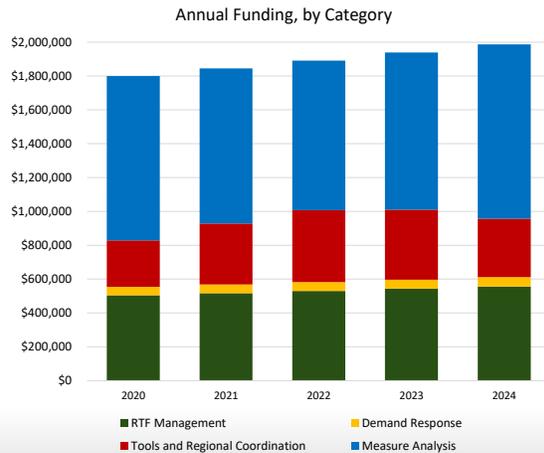
- RTF is funded by BPA, Energy Trust of Oregon, and regional utilities
 - Council also supports RTF through staff, office/meeting space, etc.
- RTF PAC consists of funders and other key organizations to secure funding and advice Council on RTF scope and policy issues



5

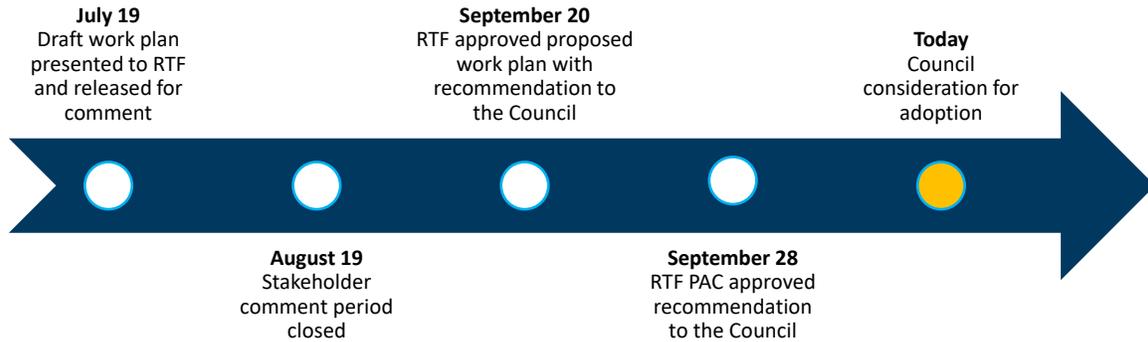
Agreed to Funding Levels

- Starting with \$1,800,000 in 2020 and increasing with inflation
- Sufficient budget for:
 - 6 contract analysts
 - Additional contract support
 - RTF Manager
- Funders agreed to manage this as a 5-year budget, allowing unspent funds from early years to support expanded scope in later years as needed



6

Work Plan Development Timeline



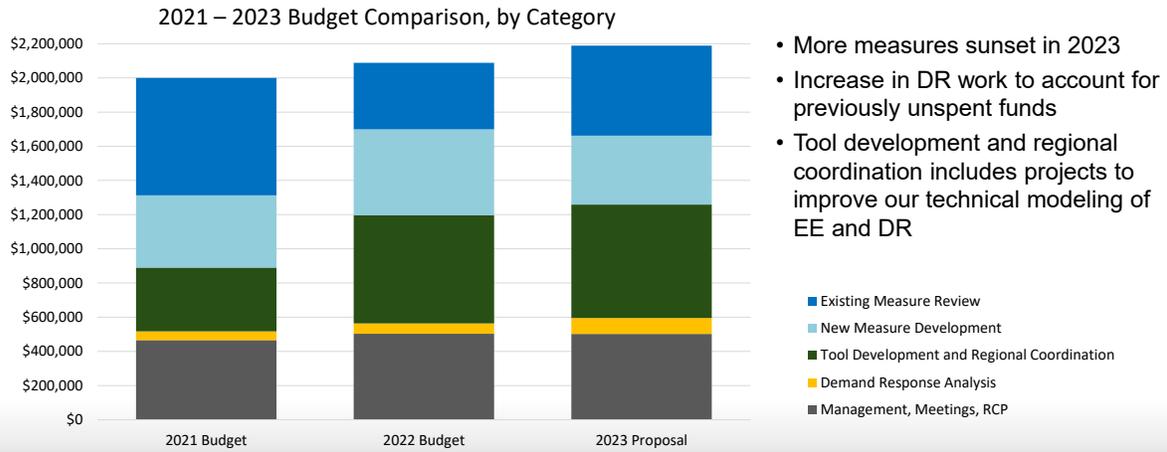
7

Proposed 2023 RTF Budget

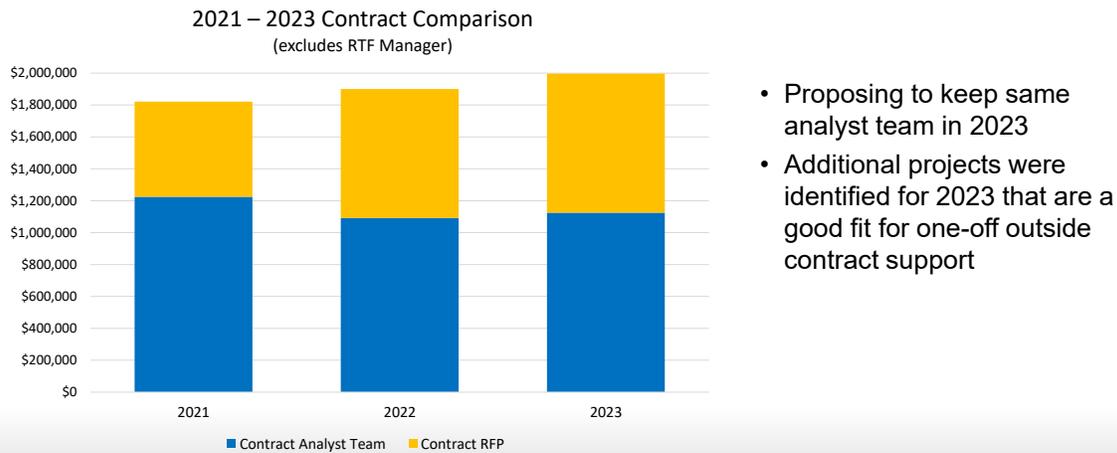
Category	Contract RFP	Contract Analyst Team + Manager	Total Funders	Council Contribution	% of total
Existing Measure Maintenance	\$90,000	\$340,000	\$430,000	\$13,090	20%
New Measure Development	\$35,000	\$294,500	\$329,500	\$6,160	15%
Standardization of Technical Analysis	\$45,000	\$125,000	\$170,000	\$0	8%
Tool Development	\$213,300	\$60,000	\$273,300	\$3,000	12%
Regional Coordination	\$245,000	\$145,000	\$340,000	\$16,000	18%
Demand Response	\$40,000	\$53,800	\$93,800	\$10,000	4%
Regional Conservation Progress	\$60,800	\$0	\$60,800	\$45,000	3%
RTF Meeting Support	\$135,000	\$107,000	\$242,000	\$10,000	11%
RTF Management	\$7,000	\$192,000	\$199,000	\$66,500	9%
Total	\$871,100	\$1,317,300	\$2,188,400	\$169,750	100%

8

Total Budget Compared to Previous Years



Breakout Between Analyst Team and Other Contracts



Projects Identified for 2023

Measure
Maintenance and
Development

Updates to Standard
Information
Workbook and
Guidelines

Enhanced
Residential Model to
Support EE and DR
Analysis

Wrapping up
Enhancements to
Commercial Building
Models

Continuing Efforts
on the EE and DR
Interface

Creating and
Improving Savings
Shapes to Inform on
Timing of Savings

Exploring Potential
Framing of an EV
Efficiency Measure

11

Stakeholder Comments

CLEAResult:

Identified specific enhancements for a couple of measures that will be addressed in late 2022 and early 2023.

Staff Recommendation:

The current budget levels are sufficient to support the analysis, and the RTF team will reach out to CLEAResult and other stakeholders to identify potential updates.

Energy Trust of Oregon:

Consider opportunities for electric vehicle efficiency, as more products come to market.

Staff Recommendation:

Contract with a firm to frame out EV industry, including an understanding of efficiency across products, to inform efficiency potential and opportunities.

12

Questions and Decision

