

RTF Measure Categories and Definitions

The RTF separates measures and activities into four categories, depending on how their savings and costs are determined:

1. **Deemed Measures** - Measures for which it is possible to “deem” per unit energy savings, cost and load shape based on program evaluation data and engineering estimates.
2. **Provisional Measures** - Interim cost and savings estimates for technologies, measures or practices where there is not sufficient program evaluation data or engineering estimates to deem savings and where program deployment is designed to provide such data or lead to an approved M&V protocol for measure - or program-level savings.
3. **Simplified M&V Measures** - Measures whose incremental cost and/or energy savings can be reasonably established using site-specific input assumptions¹ along with RTF pre-approved stipulated input values and engineering calculation methodologies. Simplified M&V Protocols are developed for groups of measures with common characteristics, which are expected to occur often enough to justify their development. By providing Simplified M&V Protocols, the RTF intends to help avoid the costs and barriers that would otherwise be encountered in developing Custom M&V Protocols for each measure installation. A Deemed Calculator is sometimes developed as a tool to accompany a Simplified M&V Protocol.
4. **Custom M&V Measures** - Measures and programs for which there is insufficient information to “deem” savings and which occur too infrequently or cannot be specifically defined to justify development of a Simplified M&V Protocol. For these measures and programs, the RTF points to more generic M&V protocols² for guidance on determining site-specific or program-level energy savings and costs.

Application of RTF Approved Measures

1. What does it mean for a measure to be a Deemed Measure?

- 1.1. Program implementers can “book” the per-widget savings and costs as measures are installed.
- 1.2. No further evaluation, M&V, engineering analysis, or market research is required provided that the measures are installed in accordance with the measure description and technical requirements.

2. What makes a measure eligible to be a Deemed Measure?

- 2.1. The RTF is confident that the deemed savings value represents the average savings the program will generate. Annual electricity savings, incremental cost and load shape or net energy production in the case of direct application and unmetered renewable resources can be reliably predicted with known variance based on prior program evaluations or generally accepted engineering calculations.

¹ For example: hours of operation for efficient lighting, average loading for motors, or pounds of milk produced per day.

² The RTF will provide review and comment on large program evaluation plans. For generic guidance on M&V, the RTF points to its Appendix P and the IPMVP.

- 2.2. Current baseline practice is consistent with practice on which prior savings and/or net energy production in the case of direct application and unmetered renewable resources estimates were established.
- 2.3. The measure, technology or practice will be delivered in a manner consistent with prior program design and/or assumptions used in the engineering calculations (e.g., hours of operation).
- 2.4. The measure, technology or practice is at least as efficient as that used to establish savings and/ or net energy production in the case of direct application and unmetered renewable resources based on prior program evaluations.
- 2.5. Less rigorous application of the above criteria may be used when the total savings from the measure, technology or practice are likely to be small (<0.25aMW/year).
 - 2.5.1. The RTF may judge the deemed savings and/or cost estimates “close enough” even if they could be more refined with better supporting data but the effort and cost to do so outweigh the benefit of having a more refined number.

3. Are Deemed Measures good forever?

- 3.1. No.
- 3.2. The RTF will establish a “sunset date” for each Deemed Measure and set forth a schedule to review its cost and savings.
- 3.3. Upon reviewing a Deemed Measure the RTF may decide to:
 - 3.3.1. Extend “sunset date” for the measure with its cost and savings unchanged
 - 3.3.2. Adopt revised cost and savings assumptions for the measure
 - 3.3.3. Re-classify the measure as a Provisional Measure, until the RTF recommends otherwise.
 - 3.3.3.1. Re-instatement by the RTF as a Deemed Measure will be contingent upon the outcome of future evaluations, M&V, engineering work, and/or market research
 - 3.3.4. Sunset the Deemed Measure and recommend that
 - 3.3.4.1. A Simplified M&V Protocol be developed for it,
 - 3.3.4.2. It be treated as a Custom M&V Measure, or
 - 3.3.4.3. It be eliminated.
- 3.4. At any time, as additional information is obtained about a Deemed Measure that would alter the savings or cost estimates, the RTF may consider changing the savings or costs.

4. What does it mean for a measure to be a Provisional Measure?

- 4.1. Program implementers can “book” the per-widgit savings and costs as measures are installed
 - 4.1.1. An evaluation, M&V, and/or more detailed engineering analysis, and/or market research is required to further refine the savings and/or cost estimates.
 - 4.1.2. The RTF will review the M&V, evaluation/engineering analysis, and/or market research plan(s)
 - 4.1.3. A “true-up” of the savings and/or costs “booked” under the program may be required.
 - 4.1.3.1. The true-up will be based on the results of the M&V, evaluation, detailed engineering and/or market research. The M&V, evaluation, detailed

engineering and/or market research work may or may not lead to classifying the measure as “deemed”

5. What makes a measure eligible to be a Provisional Measure?

5.1. The RTF is somewhat confident that there is medium to low “risk” in provisionally deeming the measure

5.1.1. The provisional savings estimate is expected to represent the average savings the measure or program will generate

5.1.1.1. The provisional savings estimate is supported by preliminary program evaluation results and/or reasonable engineering estimates

5.1.2. The provisional cost estimate is expected to represent the average incremental cost of the program

5.1.2.1. The provisional cost estimate is supported by preliminary market research or other supporting data

5.2. There is a specific plan to evaluate savings and secure incremental cost data from the Provisional Measure

5.2.1. The plan is designed to provide the elements necessary to perform the true-up of savings and costs and to revise forward-looking savings estimates, deemed calculation or protocols where applicable

5.3. Less rigorous application of the above criteria may be used when the total savings from the measure, technology or practice are likely to be small (<1.0 aMW/year).

5.3.1. The RTF may judge the provisionally deemed savings and/or cost estimates “close enough” even if they could be more refined with better supporting data but the effort and cost to do so outweigh the benefit of having a more refined number.

6. Are Provisional Measures good forever?

6.1. No.

6.2. Upon approval as a Provisional Measure, the RTF will recommend a sunset date. After a sunset date passes, the measure savings classification will be changed from “provisional savings” to “inactive”, until the RTF recommends otherwise. “Inactive” means the measure’s savings and costs are no longer supported by the RTF and are not recommended for use.

6.3. At any time, as additional information is obtained about a Provisional Measure that would alter the savings or cost estimates, the RTF may consider changing the savings or costs.

7. What does it mean for a measure to be non-deemable?

7.1. Program implementers cannot “book” savings and costs for measures until after the required M&V or program evaluation is complete.

8. What role does the RTF play in M&V and program evaluation of Custom measures?

8.1. The RTF typically does not review the custom M&V plans for individual measures or programs, but may review such plans on request

8.2. The RTF does review program evaluations that have regional scope (i.e., could be applied to similar programs operated by multiple program implementers across the region)

9. What causes a measure(s) to require Custom M&V or program level evaluation?

9.1. The technology, measure or measure application is unique

- 9.2. Although operating hours, load, baseline and energy efficient measure efficiencies, and/or other operating characteristics are generally known on a project by project basis to enable estimation of energy savings, they vary widely from project to project.
- 9.3. Multiple measures are delivered through the same program
 - 9.3.1. The mix of measures installed varies across program participants
 - 9.3.2. Installed measures interact so that allocation of savings to individual measures is problematic
- 9.4. It is more cost-efficient to employ a program level evaluation to determine savings than to conduct the research necessary to produce a deemed savings estimate
- 9.5. More repaid deployment of a technology, measure or practice can be achieved through the use of M&V or program level evaluation due to data limitations
- 9.6. Use of a deemed savings approach to estimating savings would produce highly uncertain results

10. What options exist if the Custom M&V protocols or evaluation requirements place a large burden on program implementation?

- 10.1. Collaborate with program implementers who are targeting the same technology, measure or practice on a program evaluation
- 10.2. Modify the program design so that a less burdensome program evaluation or Custom M&V protocol can be used.
 - 10.2.1. This could require either aggregation or disaggregation of measures and the acceptance of higher risk
- 10.3. Request that the RTF investigate the feasibility of a Simplified M&V Protocol for the technology, measure or practice
- 10.4. Focus on alternative technologies, measures or practices

11. Can I ask the RTF to review a new measure or re-consider one of its existing recommendations?

- 11.1. The RTF maintains a petition process whereby individuals or organizations can request that it reconsider any of its recommendations
- 11.2. Parties may initiate the process by contacting the Chair of the RTF either in writing, via electronic mail or through the use of the link provided in the RTF online Planning, Tracking and Reporting system
 - 11.2.1. If a new or request to review an existing Deemed Measure is proposed the party making the proposal should submit the incremental cost, savings and load shape data supporting their request as well as any other research that substantiates the cost and savings proposed for use.
 - 11.2.2. If a new or request to review an existing Simplified M&V Protocol is proposed, the party making the proposal should submit data demonstrating that the proposed calculation provides reasonable estimates of savings when compared to results of more detailed M&V plans or prior site-specific evaluations.
 - 11.2.2.1. The proponent should indicate which input assumptions to the calculation are subject to field verification after measure installation
 - 11.2.2.2. The proponent should indicate which input assumption are constrained or fixed and how these reduce the potential for “gaming” the calculation

11.2.3. If a new or request to review an existing general M&V protocol or evaluation design is proposed, the party making the proposal should submit the specific M&V requirements or detailed evaluation design for review

11.2.3.1. The proponent should include a description of how the proposed M&V protocol or evaluation design meets the RTF recognized evaluation guidelines such as:

11.2.3.1.1. Efficiency Valuation Organization's "International Performance Measurement Verification Protocol" (IPMVP)

11.2.3.1.2. National Action Plan for Energy Efficiency's "Model Energy Efficiency Program Impact Evaluation Guide"

11.2.3.1.3. Federal Energy Management Program's "M&V Guidelines: Measurement and Verification for Federal Energy Projects"

11.2.3.1.4. California Energy Commission's "California Evaluation Protocols"