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April 1, 2025

MEMORANDUM

TO: Council Members

FROM: Laura Thomas, RTF Manager

SUBJECT: Regional Technical Forum 2024 Annual Report

BACKGROUND:

Presenter: Laura Thomas, RTF Manager

Summary: The Regional Technical Forum (RTF) submits its 2024 Annual Report to the Council. The report's intention is to update the Council and partners about the RTF's 2024 activities and a preview of the work in the current calendar year.

A core function of the RTF is to develop and maintain a portfolio of measures of energy savings estimates for the Northwest region. In 2024, the RTF focused on its key function by ensuring that the current measure portfolio is based on the best available data and provides reliable energy savings estimates. The RTF also identified a series of potential new measures to vet and consider in the future to help grow the measure portfolio. In addition, the RTF spent time focused on supporting the region in use of its building simulation modeling tools and exploring markets with high energy demand including data centers.

At this meeting, staff will present to the Council the highlights from 2024 as captured in the Annual Report.

- Relevance: The RTF is an advisory committee to the Council. The work of the RTF is funded by Bonneville, Energy Trust of Oregon, and regional utilities. The Council also contributes to the RTF through staff and office and meeting space.
- Workplan: A.2.5. Continue to manage the Regional Technical Forum, leveraging its data and analysis to expand and enhance the assessment of energy efficiency and demand response potential.
- Background: Per its charter, the RTF is required to publish an Annual Report by mid-year. The 2024 Annual Report provides work highlights and financials for the 2024 calendar year, as well as a preview of progress made in 2025.

Regional Technical Forum 2024 Annual Report

Laura Thomas
April 2025 Council Meeting



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Presentation Overview

- Brief Background on the RTF
- 2024 Highlights
 - Expanding and updating measure library
 - Beyond measure work
- 2024 Financials
- 2025 Preview

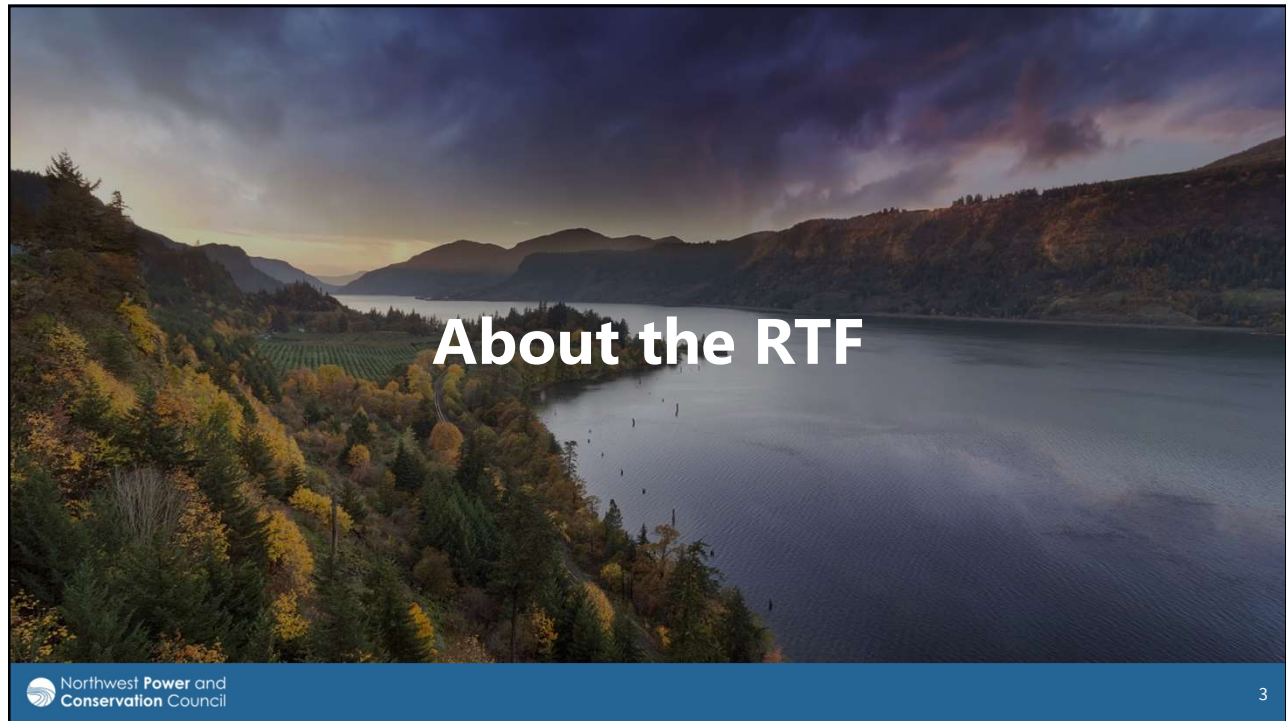


Image credit: Getty/Shutterstock

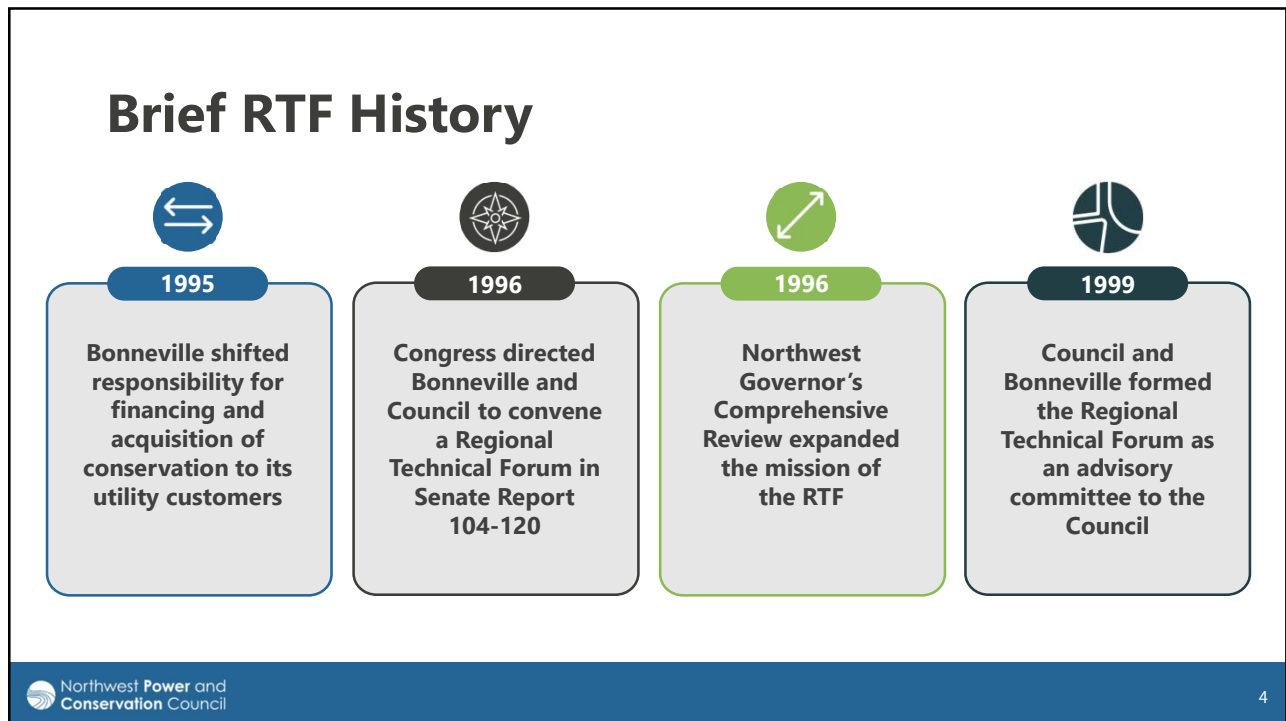


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Roles of the RTF as Defined by the Charter

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

RTF measure database, Guidelines, meetings, etc.

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

Council support

Track regional progress toward meeting Council targets annually

Regional Conservation Progress Survey

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Who Uses the RTF Work?

RTF work is publicly available for use by all stakeholders in the NW (and nationally), including RTF meetings.

- Utility programs use the data to support planning, implementation, and evaluations
- Regulators value the wide review and unbiased perspective, and often encourage the use of RTF measures where practical
- Evaluators reference RTF measures for understanding analysis assumptions and methods for savings

Open

- Findings used widely
- Learn from others
- Transparency

Peer Review

- Many eyes
- Yields high quality

Economy of Scale

- Big savers held in common
- Avoid duplication
- Seek synergies

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Where Does the Funding Come From?

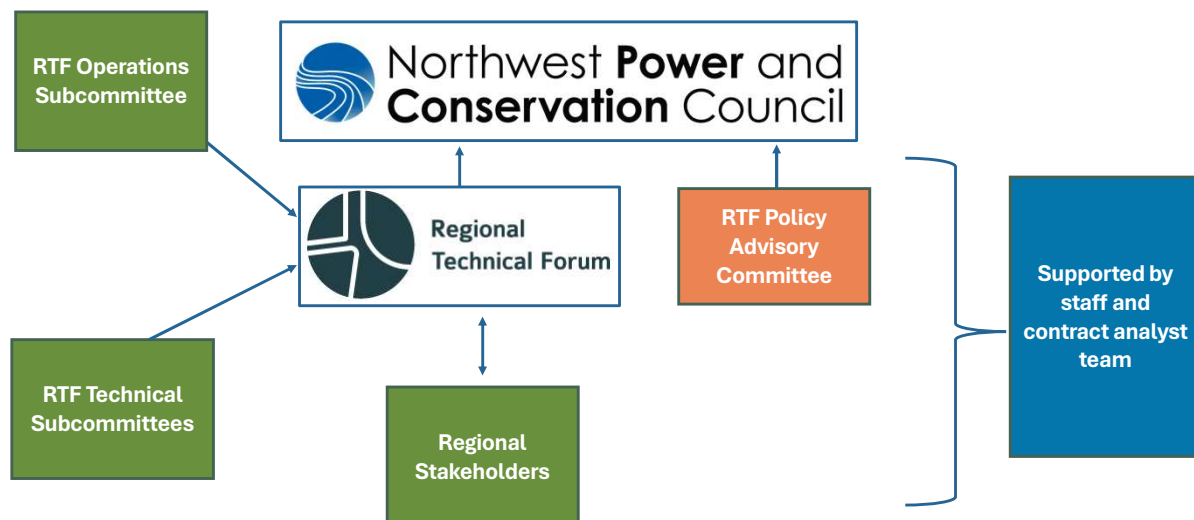
- RTF is funded by BPA, Energy Trust of Oregon, and regional utilities
 - Council also supports RTF through staff, office/meeting space, etc.
- RTF PAC is responsible for securing funding for RTF on a five-year funding cycle



* Staff is still working with NorthWestern Energy to confirm continued funding of the RTF in 2025





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Organization of the RTF




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Council Staff









Chair
Vice Chair
Manager*
Coordinator



Contract Analyst Team (CAT)







- Provide a connecting role between the Council, RTF, and RTF PAC
 - Jenn and Christian are respectively Chair and Vice Chair the RTF
 - Laura manages the day to day of the RTF, including the CAT & contracts.
 - Point person for questions on resources, work planning, connecting with the team, policy questions, and more!
 - Chad maintains the website and ensures meetings run smoothly!
 - Point person for questions about meetings or the website.

*Only position funded through RTF budget

- Competitively bid contract positions that provide analytical support for the RTF.
 - Expertise includes engineering, statistical/ evaluation/research design, and EE programs
- Develop recommendations for the RTF consistent with the Guidelines, existing policy, and previous RTF decisions
- Engage with experts throughout development process
- Review and support team for greater consistency across work projects


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Highlights from 2024


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Updating the Existing Measure Portfolio

The RTF reviewed 26 measures to ensure they continue to maintain relevance and reliability.



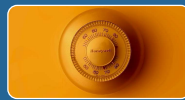
Commercial Foodservice Measures

- 5.25 aMW and 12 million therms of regional potential



Air Source Heat Pumps

- 416.1 aMW regional potential



Residential Gas Furnaces

- 78 million therms regional potential



New Manufactured Homes and HVAC

- 3.14 aMW and 143,000 therms building improvements regional potential
- 9.2 aMW and 108,000 therms higher efficiency HVAC regional potential

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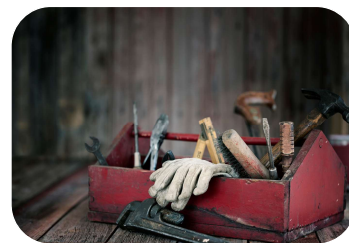
Expanding the Portfolio and Other Focus Areas



New Electric Measure
Scan

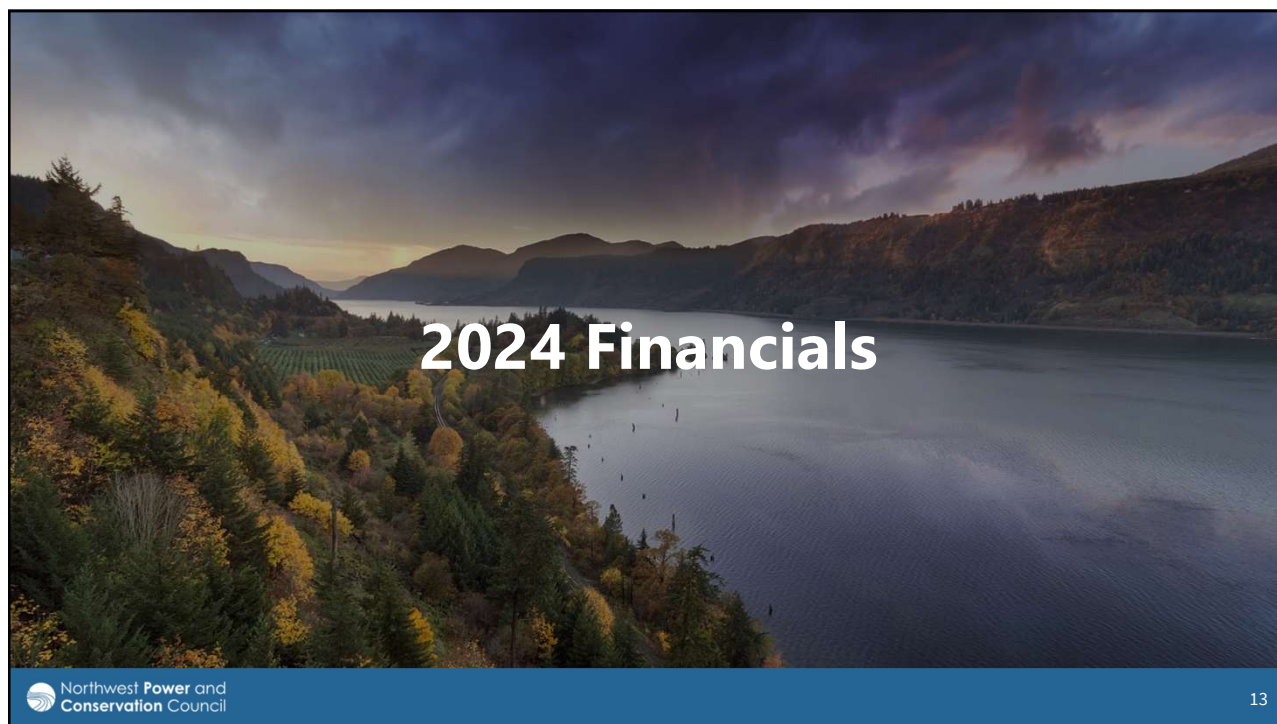


Data Centers Market
Characterization



RTF Tools Maintenance
and Training

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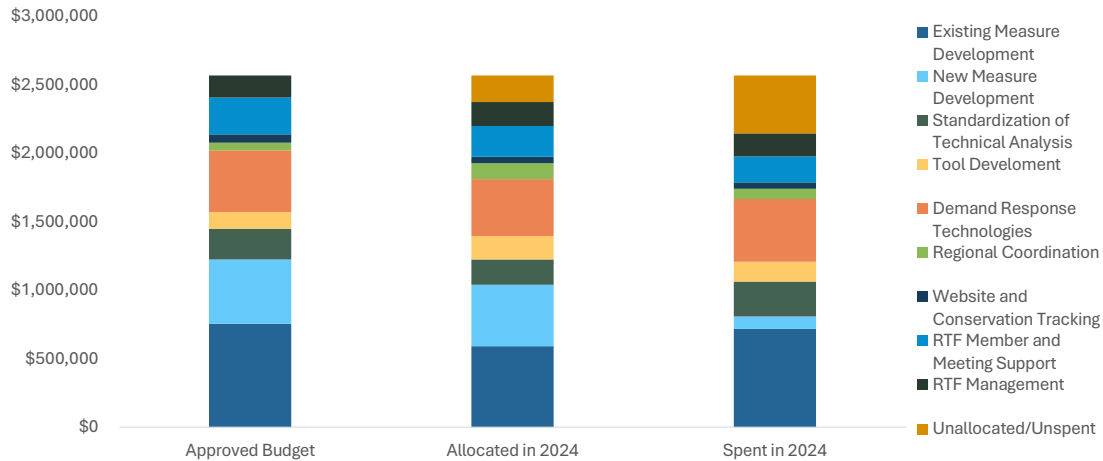
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RTF Funding in 2024

- In 2019, the RTF Policy Advisory Committee secured five-year funding commitments for the RTF for 2020-2024 calendar years.
- At this time, two new funding sources were added:
 - Two new electric utilities
 - Natural gas efficiency programs
 - Portland General for Demand Response activities
- Budget levels were developed based on ensuring the core needs of the measure library maintenance and addition of a few projects intended to support regional programs.
- Funders agreed to managing the funding as a five-year budget, allowing unspent funds to rollover to future years within this cycle.

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2024 Year End Financials



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2024 Unallocated and Unspent Funds

- The \$228,549 unspent funds in 2024 were primarily due to:
 - Fewer measures requiring review by the QAQC contract.
 - Multiple contractors able to complete the work scope with less budget and hours than anticipated.
- In 2024, there was \$194,158 not allocated to contract:
 - Just over \$173,000 of the unallocated amount was from funding prior to the 2020-2024 funding cycle that was applied after the start of the cycle and not originally estimated in the five-year work scope. The RTF PAC recommended rolling over these funds in the 2025-2029 cycle based on staff's proposed ways to use the funds.
 - The remaining unallocated funding of about \$21,000 was due to being unable to identify a contractor to complete one of the planned work projects in 2024 and the contract analyst team completed this work instead.
- As 2024 is the last year in the 2020-2024 funding cycle the remaining unspent funds from the total cycle of about \$267,000 in electric funding will be returned to the funders.

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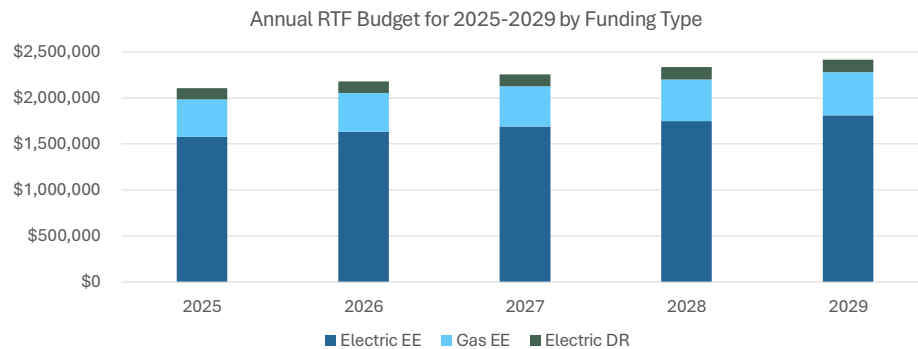


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2025-2029 Funding Cycle

- This year marks the first year of the new funding cycle with a five-year budget of \$11,295,300, where 75% of the funds for electric energy efficiency, 19% for gas energy efficiency, and 6% for electric demand response.



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2025 RTF Work Highlights



Energy Efficiency Measure Portfolio

- Updating 29 existing measures
- Developing at least 4 new measures for gas rooftop units, commercial heat pump water heaters, and air source heat pumps



Demand Response

- Updating the 5 existing demand response technologies
- Developing demand response shapes to support analysis



Commercial EV Study

- Market characterization to gain an understanding of the energy efficiency and demand response opportunities from commercial class electric vehicles



Guidelines Update

- Plan to review and update to the RTF Guidelines



Planning Measure Research

- New scope in 2025 to focus on completing the research objectives of the RTF Commercial Connected Thermostats measure, and heat pump research regional coordination



New Member Class

- In January, we welcomed a new class of RTF members whose term will be from 2025-2027.

Photo by Dan LeFebvre on Unsplash

Thank you!

