



## Regional Technical Forum

### RTF PAC Meeting Minutes November 8, 2023 1:00pm-3:00pm Pacific

#### Meeting Participants:

Debbie DePetrus, Clark PUD (Co-Chair)  
Ginny Burdick, Oregon Council (Co-Chair)  
Dan Adams, Avista  
Rich Arneson, Tacoma Power  
Kary Burin, CNGC  
Jennifer Finnigan, Seattle City Light  
Suzanne Frew, SnoPUD  
Jeff Harris, NEEA  
Mark Jerome, RTF Vice Chair, CLEAResult  
Jennifer Langdon, Cowlitz PUD  
Jennifer Light, RTF Chair  
Amy Milshtein, notetaker  
Mary Moerlins, NW Natural

Quentin Nesbitt, Idaho Power  
Jimmy Nyanwapolu, US DOE  
Elizabeth Osborne, WA Dept of Commerce  
Craig Patterson, independent  
Juan Serpa Muñoz, EWEB  
Laura Thomas, RTF Manager  
James White, Chelan PUD  
Jake Wise, PGE  
Alan Zelenka, ODOE  
Leann Bleakney, NWPCC  
Sarah Castor, Energy Trust of Oregon  
Ralph Cavanagh, NRDC  
Chad Madron, NWPCC

#### Key Outcomes:

At the Q4 RTF Policy Advisory Committee Meeting, members discussed the following:

- Provided initial feedback on the 2025-2029 Funding Agreements to support staff development of a proposal for the first quarter 2024 meeting, including indicating continue interest in natural gas and demand response for the next cycle. Additionally, members indicated interest in discussing including primary research in the next cycle's scope once staff pulled together a proposal for consideration.

#### Discussion:

RTF PAC Co-Chair Ginny Burdick, called the meeting to order at 1:00 pm. She introduced new members Jake Wise, PGE and Rachel Clark, Tacoma Power, adding that Rich Arneson will be sitting in for Clark at this meeting. She then asked Laura Thomas, RTF Manager, to call for introductions.

Burdick asked if there were any proposed changes to the September 15, 2023 minutes. There were none and the minutes were approved.

## ***Management Updates***

Thomas presented RTF 2023 progress to date. There were no questions.

## **2025-2029 Funding Agreement Initial Discussion**

Slide 11

Jennifer Light, RTF Chair, added context saying that prior to 2012, funding was granted using an annual subscription basis that caused funds to move up and down. She said the five-year funding agreement provides more stability and ties nicely to NEEA's funding cycle. She encouraged the RTF PAC to continue this schedule.

## **Timeline**

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Light added that the presented timeline follows a trajectory similar to the last time.

## **Initial Considerations and Discussions**

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Sarah Castor, Energy Trust of Oregon, said Energy Trust will continue to offer gas-only measures and approved of the continued support.

Katy Burin, CNGC, said Cascade Natural Gas is a single fuel utility and also voiced support for continuing a focus on natural gas, including natural gas heat pumps. Mary Moerlins, NW Natural, was also in favor of the idea.

Light said these three are the big funders of the natural gas piece and was encouraged by their support.

Jeff Harris, NEEA, said NEEA was working on pre-commercialization and commercialized gas products, with a focus on gas heat pumps. He thought the RTF should be ready to catch these technologies as they mature for mainstream program implementation. Harris hoped NEEA would provide data for measure level savings, including data on dual fuel products.

Burdick asked if anyone had a contrary viewpoint. There were no comments. Light asked Dan Adams, Avista, for his opinion. Adams gave his full support.

Thomas asked if a Natural Gas Working Group was still wanted. Light added that Annika Roberts, NWPCC, sorted through all the offerings last time, noting that the working group helped a lot and recommended keeping it alive.

Burin volunteered to be in the working group, saying she can't underestimate the value of this body, what each entity learns from one other, and how it helps with strategies. Castor, Moerlins, Harris, and Mark Jerome, RTF Vice Chair, also volunteered.

Harris discussed measure analysis, highlighting the standard protocols. He pointed to tool development and model calibration work designed to increase accuracy but thought there may be more need to look at the standard protocols going forward. Harris said individual measures are important but more integrated system approaches may be a better fit for standard protocols.

Thomas added context about RTF standard protocols, saying some operate the same way as RTF measures, with review timelines, noting the two that updated this year. She said the Contract Analysts and RTF staff think about systems when putting together a measure and try to decide if a measure or standard protocol is the better fit. Thomas then said the RTF website allows for the proposal of both. Light added that they are all measures in our hearts, but the future may demand spending more resources on standard protocols.

Harris thanked Thomas and Light, saying he was thinking about the allocation of dollars and getting the right mix.

Ralph Cavanagh, NRDC, thought that Harris's comment reflected the value of flexibility in a five-year budget. He thought Thomas' presentation underscored this further, echoing Harris' comment about not seeing everything coming in five years but knowing you will need analytic capacity and the ability to course correct.

Light noted Arneson's question about the 23 dual fuel measures in the UES docket. She pointed to dual fuel weatherization and clothes dryers, cooking equipment, and others. Light said the web pages let you sort work by fuel type.

#### Slide 19

Cavanagh noted that section 179D of the federal tax code potentially unlocks billions of dollars of incentives for beating conventional building standards in both remodels and new construction. He said modeling tools are the key to securing those funds. Cavanagh said this gives every utility in the Northwest the ability to support customer enhancements at no cost. But, he continued, models must be used to demonstrate compliance. Cavanagh thought the RTF could really help with this effort as it fits well into their expertise.

Light added context, saying she was surprised by how much time the RTF spent on tool development in the last five-year cycle. She said this cycle would be more of a fine-tuning exercise with a smaller lift.

#### Slide 20

Burin wondered if there is a role for the RTF to play when it comes to behavioral studies or characterization of savings from behavioral reporting and outreach. Thomas admitted that she had not considered this but thought it would depend on what the region wants to achieve. She said the RTF has not done primary research on this to date so that would probably not be a good fit, but they could explore claimed savings from behavior-based programs.

Light referenced behavior-based work that turned into an evaluation guidance document. Burin recalled talking about Non-Energy Impacts in the past, saying this effort would be about energy reporting, which is more of a standardized characterization of savings expectations.

Light said big studies around resiliency or flexibility are other things that fit in this regional coordination bucket. Alan Zelenka, ODOE, reiterated the importance of these things, including the stock assessments and end-use load research, that are vital tools for the region.

Jennifer Finnigan, Seattle City Light, said her utility agrees that it would be useful to have regional coordination on NEIs/NEBs. She sensed that utilities are doing a lot of parallel/redundant work, adding that NEIs/NEBs help with cost-effectiveness.

Zelenka agreed. Thomas said this has been on her radar and will be addressed further. Zelenka approved of the timing, saying NEBs are already a big issue and will only get bigger.

Light added that part of the conversation is around identifying benefits as some are already being covered. She suggested convening a small work group to discuss scope. Thomas agreed a work group would be better than many small conversations. Zelenka offered to join that group.

Finnigan wanted to leverage what the IOUs and other larger organizations have done with NEIs/NEBs. She thought that the IOUs are further along than many others and hoped that they would be at the table.

#### Slide 21

Light underscored Energy Trust's funding issue around DR, referencing that other utilities picked up Energy Trust's share in the past. She thought this strategy could be part of the next DR scoping conversation.

Quentin Nesbit, Idaho Power, said the RTF generally looks at research and comes up with deemed numbers. However, he struggled with the concept when it came to DR. He said this is because the participating company evaluates what happens at the event, saying it has to be a real, known number. He wondered what the RTF could offer that he doesn't already have.

Light said the RTF PAC spent a lot of time on this in the last round which yielded a relatively minimal scope of work. She said it was focused on better understanding the max per unit that you could get as a way of finding a better planning input. Light acknowledged that this is very different from other RTF measures. She said recent work looked at the interaction between DR and EE to best capture the full benefit of those resources while thoughtfully accounting for costs. Light thought there was room for more work beside that narrow question.

Zelenka called DR a big deal going forward. He addressed the second bullet on the slide about developing sample DR programs to use in modeling tools and other enhancements, asking for an example. Thomas pointed to load shifting and Time of Use rates and the work of figuring out what the region cares about. She said the 2021 Plan identified TOU rates, but there is more to look at including savings shape and potential. Thomas used EV market characterization as an example, saying TOU has become very important there. She wanted to pinpoint what the region cared about as they can't model all the DR uses.

Light added that staff have been thinking about BYO thermostat programs, exploring what would happen to energy use and the impact on potential savings if a pre-cooling period ran before the event. She said TOU was also found to be valuable but questioned what energy savings will look like if the region has a lot of TOU. Light admitted these questions need more internal scoping.

Arneson wrote that he very much supports expanding the depth and breadth of DR measures. For example, there is a very wide spectrum of EV-managed charging that was completely missed in the RTF early work, in the chat.

Castor wrote that while Energy Trust doesn't run DR programs or measures, her sense is that we are supportive from the perspective of valuing the DR benefit that an EE measure might provide, in the chat.

Finnigan wrote that she agrees with Arneson, saying the RTF's DR inputs are really important in our DR Potential/IRP analysis. She said we need better inputs that are continually updated, particularly for mass-market DR measures, in the chat.

Thomas said she's getting the sense that the group approves. She wondered if there should be a working group for this. Light suggested emailing out a rough proposal for feedback.

Moerlins thought it is important for the RTF to do DR work because of overlap and co-branding. She thought this would come up and should be thought about, noting dumb or smart meters in the natural gas world. She admitted that the motivation might not be the same but agreed that this would be smart to do.

Elizabeth Osborne, WA Dept of Commerce, wrote that she agrees with Moerlins comment in the chat. Thomas thought that perhaps the gas working group could talk about this too.

## Slide 22

Light added more context, saying past conversations touched on the somewhat high number of Planning measures and an agreed-upon focus on high-priority measures that made sense to move forward. She said in the past the group almost moved forward on shower head research, but updated Federal Standards made the measure moot. Light said testing regional appetite on a case-by-case basis still made sense to her.

Caster was intrigued and wanted further discussion. She pointed to Energy Trust's long evaluation and research list, saying it would be terrific if the RTF could help.

Thomas said she is focusing on prioritizing measures now to give the region more context and will share that out when completed.

Finnigan also supported the effort, saying anecdotally she's seeing fewer evaluation staff working at utilities which may make it harder for utilities to take on research. She thought the RTF would be a great organization to help close this gap.

Nesbitt also supported this idea as Idaho Power doesn't do much research. He thought it unaffordable for a single utility to take on research. Nesbitt called this a large gap, particularly with small measures that no one has researched in the past or has plans to in the future. He admitted that this is a major change in policy but was in favor of the RTF filling this vital gap.

Zelenka's first thought about this was, "If not the RTF, then who?" and saw that the answer is "no one" as the work is not getting done. He asked what the added value of going from Planning to Proven is. Light explained that utilities only have to verify delivery for Proven and nothing else while Planning needs research or a full, deep, impact evaluation. She said the BPA follows RTF evaluation guidelines, but other utilities follow it to different degrees.

Zelenka approved of a group discussing which Planning measures would be most valuable to research. Arneson added that primary research is a challenge for smaller utilities. He said Tacoma Power is just big enough to want research but small enough to make it really hard to do. Arneson said the utility tries to piggyback on Bonneville's research efforts.

Thomas heard the support, saying she will finish her initial prioritization work and look for ongoing research to avoid duplication before calling for a working group. She asked the RTF PAC to send her their thoughts before the March 2024 meeting.

#### Slide 24

Finnigan had to leave early but wrote, I wanted to include one more topic for RTF consideration: might it be possible to come up with new measures/inputs for income limited residential programs? In Washington, CETA is directing us to focus on highly impacted communities and vulnerable populations, and the current costs/benefit assumptions don't apply very well to these groups, in the chat.

Light responded, thanks Jennifer. We can talk more about this. We did have a discussion earlier about whether we should try to split our measures to account for different characteristics. Similar to the NEIs discussion, I think some clarity on definitions would be a helpful first step for framing those measures. Let's chat more about this between now and March as we scope out the funding, in the chat. Finnigan replied, sounds good, Jennifer.

Nesbitt approved of in person meetings if they were coordinated with the NEEA board meeting.

Castor wrote, I think there is always value in in-person meetings, but it sort of depends on who replaces Fred Gordon on the PAC, in the chat.

Thomas expressed hope for an in-person meeting in March to dig into some of the meatier issues brought forward today. She said there will also be a webinar option as well. Arneson wrote, thanks for suggesting the webinar option. That would likely improve attendance, in the chat.

#### Slide 25

Burin said she found it useful to tie to NEEA's funding communications with the gas commission as it provides consistency and avoids having to tell a separate funding calculation narrative. Nesbitt also approved. There were no dissents.

Cavanagh said there have been no cost recovery issues before but offered his full-throated endorsement if any questions arise.

Slide 26

Light announced that Cavanagh is retiring at the end of the month and took a moment to thank him for his work and support. Cavanagh expressed his gratitude to be able to serve in what he called an "essential cornerstone of the energy efficiency and demand response ecosystem of the Northwest." He said this is one of the strongest in the world, crediting the RTF and RTF PAC for that title, and wishing everyone the best.

Light the announced that Fred Gordon, Energy Trust of Oregon, is also retiring. She praised his work and schemed to get him to come to a future meeting for a proper send off. Castor hinted that Gordon will be around, just not at Energy Trust.

Burdick thanked Cavanagh for his work and many RTF PAC members wrote their good wishes in the chat. Burdick said the 2024 meeting schedule is coming and thanked Thomas for her skill when presenting the RTF PAC work plan to the Council, adding that it received a unanimous yea vote.

Debbie DePetris, Clark PUD, and RTF PAC co-chair, thanked the room. Burdick adjourned the meeting at 2:50 pm.