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July 29, 2014

### MEMORANDUM

**TO:** Council Members

**FROM:** Jennifer Anziano, RTF Manager

**SUBJECT:** Regional Technical Forum 2013 Annual Report

The Regional Technical Forum (RTF) published its annual report highlighting important milestones and accomplishments that occurred during the 2013 calendar year, as well as activities currently underway in 2014. Over the past year, the RTF has made valuable organizational and process changes that streamlined its work while providing higher quality analysis. The RTF has also made great strides in reviewing and updating its library of savings estimates.

Staff will provide an overview of the 2013 Annual Report, as well as an update on the current progress in 2014.

The annual report will be provided at the August Council meeting and is also available online at the RTF website.

# Regional Technical Forum 2013 Annual Report

August 2014 Council Presentation  
Portland, Oregon



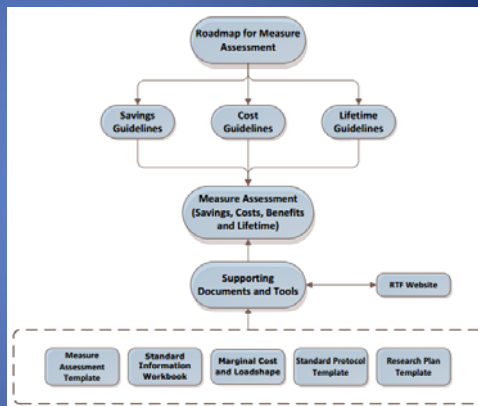
## 2013 In Review

- Adopted enhanced guidelines for increased applicability and transparency
- Shifted organizational structure to streamline workflow
- Made significant progress on updating measures and added quality control process
- Advancement a variety of important measures for the region through subcommittees



## Enhancements to the Guidelines

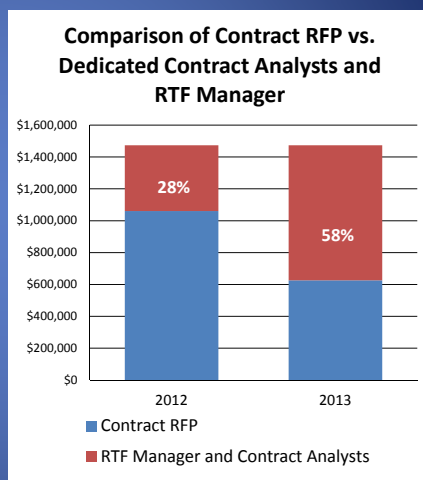
- Pulled all guidelines into single volume
- Created a roadmap to provide an overview
- Adopted tools in support of guidelines



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## Created Dedicated Analyst Team

- Created dedicated team of contract analysts
- Provided greater consistency and streamlined processes
  - Greater familiarity with guidelines
  - Enable deeper dive analysis internally
- RTF Members expressed satisfaction with change



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## Status of Measure Updates

Measure Category	MEASURE STATUS				Grand Total
	Active	Deactivated	Out of Compliance	Under Review	
(none)		22	0	0	22
Proven	31	0	11	9	51
Provisional	4	0	1	0	5
Small Saver	16	0	0	0	16
Planning	2	0	0	0	2
<b>Grand Total</b>	<b>53</b>	<b>22</b>	<b>12</b>	<b>9</b>	<b>96</b>

Made significant progress from 2012

2012	
Out of Compliance	Under Review
26	15



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## Third Party Review of Work Products

RTF QA/QC - UES Main Checklist			
RTF Measure Name	Workbook Filename	First, initial and date the appropriate By, Check, or Approve column.	
		If an item does not apply, write "NA." Otherwise check ✓ if complete, or circle ○ if not complete.	
		BY	CHECK APPROVE
		Checks Initialed By:	
		Date:	
Check Type	Item #	Checklist Items	BY CHECK APPROVE
Summary Tab	1	Start by reviewing information in "Summary" tab to become familiar with the measure and proposed methodologies.	
Measure Savings	2	Start at the "Measure InputOutput tab", and locate the measure savings data. Trace the measure savings back to the "SavingsData&Analysis" (or equivalent) tab and check formulas and calculations for correctness and consistency.	
Measure Savings	3	Follow cell references in the "SavingsData&Analysis" (or equivalent) tab to other worksheets, as necessary, to ensure that all inputs used to develop the measure savings are referenced correctly.	
Measure Savings	4	If external sources of information/data were used to develop the measure savings, check the original sources (if available and obtainable) to verify that the info/data is pulled into the workbook correctly.	
Measure Savings	5	Check other worksheets, including "MeasureTable", to ensure that the measure savings are referenced and used correctly.	
Measure Savings	6	Verify that savings estimation and documentation standards are satisfied and in compliance with the RTF's <i>Guidelines for the Estimation of Energy Savings</i> .	



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## Subcommittee Snapshot

- **Small/Rural:** Focused on schools (passed a weatherization measure, explored lighting opportunities)
- **Non-Residential Lighting:** Developing a provisional Lighting Standard Protocol and related research plan
- **Wood Smoke:** Exploring whether measures that reduce wood smoke should get non-energy benefits for decreasing mortality in region
- **Research and Evaluation:** Planned and prioritized measure updates; shifted focus to research plans for provisional measures and protocols

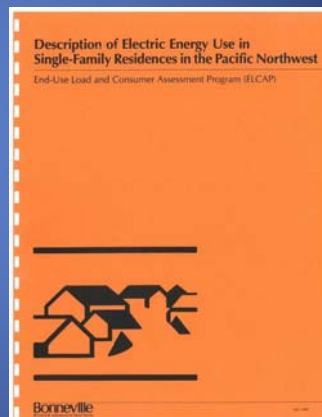


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## Other Enhancements

### Standardized Proposal Process

### Accessing ELCAP Online



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## 2013 Year End Financials

Category	Projected Allocation in Work Plan	Actual Funds Spent	% Spent Compared To Allocated
Existing Measure Review & Updates	\$539,707	\$547,860	102%
New Measure Development & Review of Unsolicited Proposals	\$158,102	\$149,744	95%
Standardization of Technical Analysis	\$65,303	\$22,637	35%
Tool Development	\$93,290	\$109,606	117%
Research Projects & Data Development	\$149,166	\$50,006	34%
Regional Coordination	\$85,434	\$67,407	79%
Website, Database Support, Conservation Tracking*	\$0	\$40,000	100%
RTF Member Support & Administration	\$170,868	\$192,318	113%
RTF Management	\$211,130	\$221,129	105%
<b>Total</b>	<b>\$1,473,000</b>	<b>\$1,400,705</b>	<b>95%</b>

\* Council in-kind contribution



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## Highlights for 2014

- Completed a Operations and Procedure Manual
- Made significant progress on measure updates
- Developing important new measures for the region
  - Non-residential lighting standard protocol
  - Ductless heat pumps for forced air furnaces
  - Heat pump water heaters
  - Behavioral guidelines for savings and persistence
- Secured 5 year funding commitments from sponsors (2015-2019)
- Transition in RTF Manager position



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## Measure Review Progress

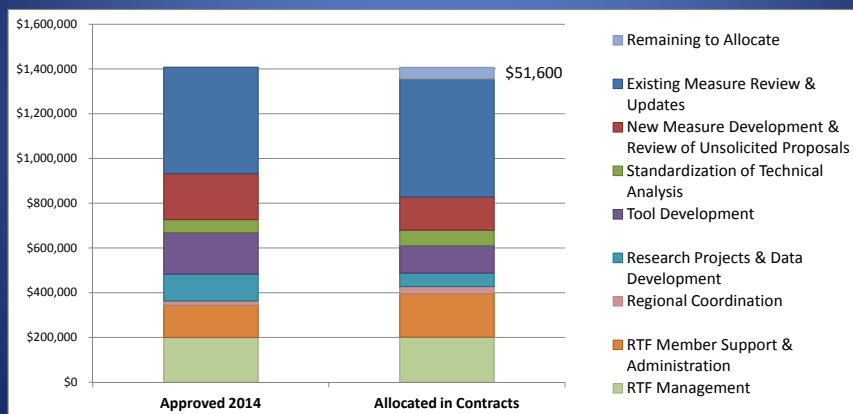
Sector	Measure	Category	Status	Latest RTF Decision	Sunset Date
Residential	Appliances - Clothes Washers in SF	Proven	Active	9/17/2013	2/28/2015
Residential	DHW - Efficient Tanks	Small Saver	Active	9/18/2012	3/31/2015
Residential	Appliances - Refrigerators	Proven	Active	4/16/2013	4/30/2015
Residential	New Construction - Energy Star Homes SF - Oregon 2012	Proven	Active	4/23/2014	4/30/2015
Residential	Lighting - LEDs	Proven	Active	4/23/2014	6/30/2015
Residential	Lighting - CFLs	Proven	Active	4/23/2014	6/30/2015
Residential	Lighting - Specialty CFLs	Proven	Active	4/23/2014	6/30/2015
Residential	Appliances - Refrigerator/Freezer Decommissioning	Proven	Active	5/13/2014	6/30/2015
Residential	Heating/Cooling - PTCS Duct Sealing MH	Proven	Active	11/14/2012	8/31/2015
Residential	Heating/Cooling - Air Source Heat Pump Upgrades SF (Existing Construction)	Proven	Active	1/23/2013	8/31/2015
Residential	Heating/Cooling - Air Source Heat Pump Upgrades SF (New Construction)	Proven	Active	1/23/2013	8/31/2015
Residential	Advanced Power Strips	Planning	Active	8/20/2013	8/31/2015
Residential	Heating/Cooling - Prescriptive Duct Sealing SF	Planning	Active	8/20/2013	12/31/2015
Residential	New Construction - Energy Star Homes SF - ID/MT BOP2	Proven	Active	3/18/2014	12/31/2015
Residential	New Construction - Energy Star Homes SF - ID/MT DHP TCO (provisional)	Proven	Active	3/18/2014	12/31/2015
Residential	New Construction - Energy Star Homes SF - Idaho	Proven	Active	3/18/2014	12/31/2015
Residential	New Construction - Energy Star Homes SF - Montana	Proven	Active	3/18/2014	12/31/2015
Residential	Appliances - Dishwashers	Proven	Active	4/23/2014	12/31/2015
Residential	Heating/Cooling - Electronic Thermostats	Proven	Active	5/3/2011	5/31/2016
Residential	Heating/Cooling - PTCS Duct Sealing SF	Proven	Active	5/3/2011	5/31/2016
Residential	Weatherization - Single Family	Proven	Active	3/13/2012	5/31/2016
Residential	Heating/Cooling - Air Source Heat Pump Conversions SF	Proven	Active	5/15/2012	5/31/2016
Residential	DHW - Showerheads	Proven	Active	6/1/2011	6/30/2016
Residential	Heating/Cooling - Ground Source Heat Pump Upgrades	Proven	Active	10/4/2011	8/31/2016
Residential	Lighting - High Performance 4-foot T8 Lamps	Proven	Active	10/16/2013	9/30/2016
Residential	Lighting - High Performance 8-foot T8 Lamps	Small Saver	Active	10/16/2013	9/30/2016
Residential	New Construction - Slab Insulation	Proven	Active	3/18/2014	12/31/2016
Residential	Heating/Cooling - Ductless Heat Pumps SF	Proven	Active	6/17/2014	1/31/2017
Residential	Weatherization - Manufactured Home	Proven	Active	3/13/2012	2/28/2017
Residential	Heating/Cooling - PTCS Commissioning, Controls, & Sizing MH	Proven	Out-of-compliance	11/19/2013	7/31/2014
Residential	Weatherization - Multi-Family	Proven	Out-of-compliance	11/1/2011	8/31/2015
Residential	Heating/Cooling - Air Source Heat Pump Conversions MH	Proven	Under Review	12/17/2013	7/31/2014
Residential	Heating/Cooling - Air Source Heat Pump Upgrades MH	Proven	Under Review	1/22/2014	7/31/2014
Residential	New Construction - Energy Star and Ecorated Homes MH	Proven	Under Review	12/17/2013	10/31/2014
Residential	New Construction - Montana House 2	Proven	Under Review	7/15/2014	10/31/2014
Residential	Heating/Cooling - PTCS Commissioning, Controls, & Sizing SF	Planning	Under Review	7/15/2014	12/31/2014
Agricultural	Motors - Efficient Motors Replacement	(none)	Deactivated	9/18/2012	



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## 2014 Work Plan Status

Allocated 96% of 2014 budget



Status as of July 29, 2014

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## Contact

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