

Richard Devlin
Chair
Oregon

Ted Ferrioli
Oregon

Guy Norman
Washington

Patrick Oshie
Washington



Northwest Power and Conservation Council

Bo Downen
Vice Chair
Montana

Jennifer Anders
Montana

Jim Yost
Idaho

Jeffery C. Allen
Idaho

October 6, 2020

DECISION MEMORANDUM

TO: Council members

FROM: Jennifer Light
Regional Technical Forum Manager

SUBJECT: Council approval of the 2021 RTF Work Plan and Budget

PROPOSED ACTION: Staff is seeking Council decision on approval of the 2021 RTF Work Plan and Budget

SIGNIFICANCE: The RTF works on a calendar year and is supported primarily by separate Bonneville and regional utility funding. Under the RTF 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 2021 Work Plan and Budget

BUDGETARY/ECONOMIC IMPACTS

While the RTF is primarily funded by regional utilities, the Council does contribute staff time in the form of an RTF Assistant, technical support from Power Division staff, and finance, legal, and administrative support. The Council also provides office and meeting space and supports website maintenance. Approval of the 2021 RTF Work Plan does not change these current levels of support.

BACKGROUND

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 2021 Work plan and Budget represents the second year of the five-year agreement. A draft work plan was presented to the RTF in July 2020, which initiated a 30-day stakeholder comment period. Staff received comments from the Bonneville Power Administration. These comments suggested some shifts in funding levels between budget categories. Considering these comments, staff developed a final proposed 2021 work plan and budget. At its September 9-10 meeting, the RTF adopted the work plan with recommendation to the Council for approval. The RTF PAC met on September 25 to review the proposed work plan. A positive recommendation from the RTF PAC is included in the Council packet.

ANALYSIS

The \$2.0 million budget is adequate to support the level of RTF work expected to be feasible in 2021, as well as to accelerate some activities planned for later in the funding cycle. The 2020 funding level was \$1.8 million, and the RTF anticipates spending 95% of the budget. The primary driver for underspending in 2020 was adjustments related to COVID (e.g. reduction in travel costs and contract analyst hours). The 2021 assumes base funding levels of \$1.845 million, which reflects activities identified in the 2020-2024 plan and adjustments for anticipated future COVID impacts. The 2021 plan also assumes \$155,000 in rollover funds for contract work to enhance the core work plan.

ATTACHMENTS

RTF 2020-2024 Business Plan, Updated for the 2021 Work Plan
Proposed Detailed 2021 Work Plan (excel) is available at this link:
<https://nwcouncil.box.com/v/Proposed2021RTFWP>
Recommendation Memo from the RTF Policy Advisory Committee

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October 6, 2020

MEMORANDUM

TO: Council Members

FROM: Patrick Oshie, Co-Chair, RTF Policy Advisory Committee
Cory Scott, Co-Chair, RTF Policy Advisory Committee

SUBJECT: Recommendation for approval of the RTF 2021 Work Plan and Budget

The RTF Policy Advisory Committee (RTF PAC) recommends approval of the 2021 RTF Work Plan and Budget. This 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 agreement for 2020 to 2024.

The majority of the work plan focuses on the core strength of the RTF over the past 20 years: developing electric energy efficiency savings estimates and methodologies for use in efficiency program planning and evaluation. In addition, this work continues the efforts analysis of natural gas energy efficiency savings from dual fuel and natural gas technologies and the assessment of demand response potential from technologies that provide both energy efficiency and demand response. 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 the regional utilities.

The RTF PAC appreciates the opportunity to offer this recommendation to the Council and respectfully requests the Council's approval of the RTF 2021 Work Plan and Budget.



**Regional
Technical Forum**

Regional Technical Forum 2020-2024 Business Plan

**Updated for the 2021 Work Plan
Proposed August 1, 2020**

Proposed

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 and the anticipated needs for 2021.

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, and any unspent and unallocated funds from previous years may be applied 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 70 percent) 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 20 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 a full time RTF assistant who provides day to day support of the operations, as well as a portion of others' time to support 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 2021. 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 2021 Budget Levels

Category	Contract RFP	Contract Analyst Team and Manager	Total Funder Contribution	Council Contribution	% of total
Existing Measure Maintenance	\$141,000	\$431,200	\$572,200	\$14,010	29%
New Measure Development	\$76,100	\$276,600	\$352,700	\$6,585	18%
Standardization of Technical Analysis	\$0	\$185,000	\$185,000	\$0	9%
Tool Development	\$20,000	\$90,200	\$110,200	\$10,500	6%
Regional Coordination	\$125,000	\$138,000	\$263,000	\$18,000	13%
Demand Response	\$25,700	\$25,700	\$51,400	\$10,000	3%
Regional Conservation Progress	\$56,000	\$0	\$56,000	\$45,000	3%
RTF Meeting Support	\$148,000	\$78,000	\$226,000	\$10,000	11%
RTF Management	\$4,000	\$179,500	\$183,500	\$66,500	9%
Total	\$595,800	\$1,404,200	\$2,000,000	\$180,595	100%

As shown in Table 4, the total spending anticipated in 2021 is greater than the initial agreed to amount in the strategic plan (\$1,845,000). This increase is a result of the following:

- Application of up to \$100,000 of carryover electric funds from previous RTF cycles.
- Application of up to \$55,000 of rollover funds from the 2020 work plan year (\$45,000 electric, \$10,000 gas). These funds result from a combination of unallocated/unspent funds anticipated in the 2020 work plan. The biggest driver of 2020 underspend was COVID-19 impacts on RTF meeting and contract analyst team workflow.¹

The additional funds are specifically designated to support for contract RFP work. These are called out specifically below and identified in the budget in the Category Detail (2021) and Funding Shares worksheets.

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

¹ As of August 31, staff estimates up to \$89,000 in total unspent/unallocated funds from 2020. The 2021 work plan assumes use of only a portion of those funds. Should the RTF spend more in 2020 than anticipated, the RTF will adjust the 2021 budget and work plan to scale down the activities anticipated for these funds to meet the total rollover amount or \$55,000, whichever is less.



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 but will apply 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 2021 work plan assumes updates to 28 of its existing measures. This is driven by the sunset dates of 18 electric measures and 10 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.

In 2021, the RTF will also apply \$15,000 of rollover funds from 2020 to analysis in support of a variable frequency drive 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 2021 work plan assumes development of nine 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, two new dual fuel, and two 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.

In 2021, the RTF will apply \$15,000 of rollover funds from 2020 to support analysis of residential behavior program saving estimation.

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 Guidelines and the establishment of a dedicated contract analyst team to perform most 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. Due to recent updates of both documents, the RTF does not anticipate any additional updates are required in 2021. The RTF will revisit both at least once more during the five-year Business Plan period.

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. This includes a portion of one contract analyst's time to support 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, the RTF is planning significant updates to ProCost. The main driver for updates is to ensure alignment with Council 2021 Power Plan findings for cost-effective energy efficiency. The RTF is using this opportunity to rebuild ProCost for to streamline the code, increase transparency, and improve functionality. Once updated, the RTF will rerun all measures through ProCost and report out on changes in regional cost-effectiveness relative to the 2021 Power Plan findings.

Building Simulation Models

The RTF uses building simulation models for estimating energy savings in residential and commercial buildings. Currently, the RTF uses SEEM² for modeling residential single family, manufactured homes, and low-rise multifamily buildings and uses EnergyPlus³ to model

² 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>.

³ 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, the RTF focused on the EnergyPlus models, leveraging the latest NEEA Commercial Building Stock Assessment. The RTF plans to do more work with these models later in the business plan cycle.

In 2020, the RTF allocated some funding to explore alternative modeling tools and/or enhancements to existing tools that might improve its assessment of energy efficiency and demand response savings, with a focus on residential opportunities. This work is anticipated to inform modeling enhancement efforts that are slated to start in 2021 and may continue, if needed, in out years of the plan.

Another component of building simulation is using weather files to represent weather sensitive loads. For its 2021 Power Plan, the Council enhanced existing weather files to better reflect future weather resulting from climate change. The RTF has allocated some funding in 2021 to start exploring how to best align the RTF analysis with that long-term picture. This is anticipated to lead to future work of improving the analysis of weather dependent measures in support of the Council's ninth power plan efforts.

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. In preparation for the third Residential Building Stock Assessment, the RTF will allocate resources to providing recommendations to NEEA on future data needs and research design considerations based on lessons learned to date. This includes time for two contract analysts to participate in the working group supporting the scoping of the study.

In 2021, the RTF will apply \$25,000 of rollover funds from 2020 to supporting a review of the 2019 Commercial Building Stock Assessment. As the RTF shifts to more commercial measure work, it will need to understand the data in this latest report, what has changed from previous studies, and how best to use the results to inform RTF analysis.



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.

In addition, a portion of the budget in 2021 is allocated to understanding and supporting sub-regional market data analysis, exploring potential data sources and considerations for use in RTF measure analysis. This is intended to be an initial scoping effort to explore technical options for potentially addressing this need identified by some stakeholders. The RTF and the RTF Advisory Committee will need to consider whether this work continues in future years.

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 2021, the RTF is allocating \$100,000 of carryover funds from previous cycles to accelerating the savings shape work. This would focus on using available end use metering data and building simulation models to develop improved savings shapes for RTF measure analysis and addressing other questions around energy consumption that may be informed by the 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 is anticipated to be completed in mid to late 2021. To that end, the bulk of the analytical work on energy efficiency will be complete by the start of 2020. The RTF allocated some time in 2020 to support any additional analytical work required as the Council finishes the development of energy efficiency supply curves. Direct Council planning support then tapers off in 2021 and 2022, ramping up again towards the last two years of the funding cycle as the Council starts preparing for its ninth power plan.

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 anticipated timing is in the middle years of the funding cycle, after completion of the 2021 Power Plan. The specifics of any study are to be defined by the Council and/or other stakeholders.



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 one 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 and 2021, 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. In the middle portion of the funding cycle, the demand response efforts are expected to build on the analysis around end use profiles, to help inform current timing of end use loads for the technologies of interest. The final two years of the funding cycle will focus on updates to the RTF's 2019 analysis, leveraging these new analytical tools and profiles.

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 the RTF Assistant and 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 at the Council offices. 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 can 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 2021 budget assumes a mix of virtual and in person RTF meetings. Actual meeting format will be reevaluated closer to 2021 and throughout the year, and any unspent funds in this category will be allocated to other work where feasible.

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.

Proposed



2021 RTF Work Plan and Budget

October 12, 2020
Council Meeting

1

Seeking Council Decision

- Per the RTF Charter, the Council is responsible for approving RTF recommended work plans and budgets, with input from the RTF Policy Advisory Committee
- RTF operates on a calendar year, currently supported by a five-year strategic plan and funding agreement (2020-2024)
- Agreed to managing as five year budget (i.e. allows carryover to future years)
- Proposed 2021 work plan represents activities in support of regional stakeholder needs



2

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

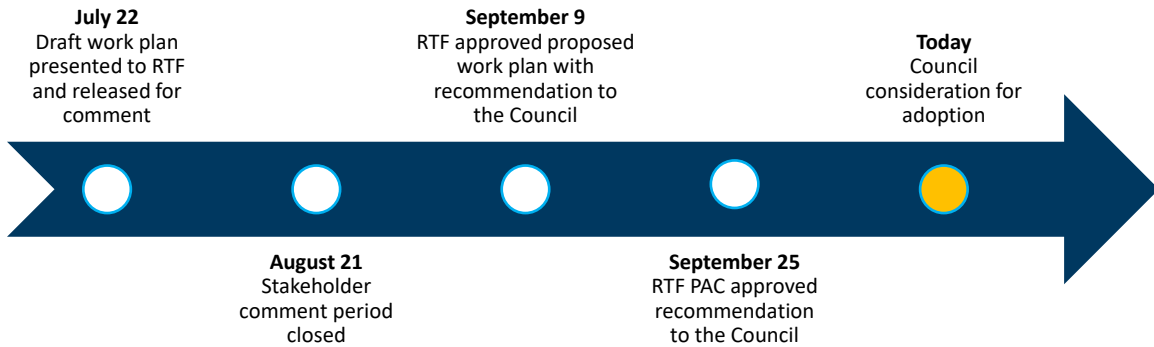
3

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**

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Work Plan Development Timeline

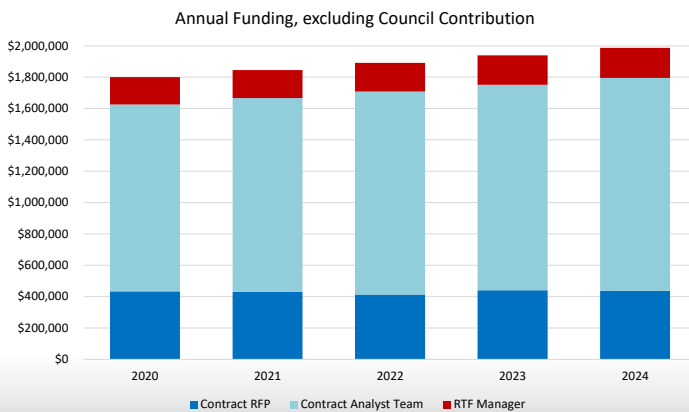


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Agreed to Funding Levels

Total 2021 Funding: \$1,845,000

← This is the starting point for the plan. Rollover funds are in addition to this.



- Starting with \$1,845,000
- Sufficient budget for:
 - 6 full time contract analysts
 - Additional contract support
 - 1 RTF manager
- Added carryover funds to accelerate work from out years and/or expand scope per stakeholder needs

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Proposed 2021 RTF Budget

Category	Contract RFP	Contract Analyst Team Manager	Total Funders	Council Contribution	% of total
Existing Measure Maintenance	\$141,000	\$431,200	\$572,200	\$14,010	29%
New Measure Development	\$76,100	\$276,600	\$352,700	\$6,585	18%
Standardization of Technical Analysis	\$0	\$185,000	\$185,000	\$0	9%
Tool Development	\$20,000	\$90,200	\$110,200	\$10,500	6%
Regional Coordination	\$125,000	\$138,000	\$263,000	\$18,000	13%
Demand Response	\$25,700	\$25,700	\$51,400	\$10,000	3%
Regional Conservation Progress	\$56,000	\$0	\$56,000	\$45,000	3%
RTF Meeting Support	\$148,000	\$78,000	\$226,000	\$10,000	11%
RTF Management	\$4,000	\$179,500	\$183,500	\$66,500	9%
Total	\$595,800	\$1,404,200	\$2,000,000	\$180,595	100%

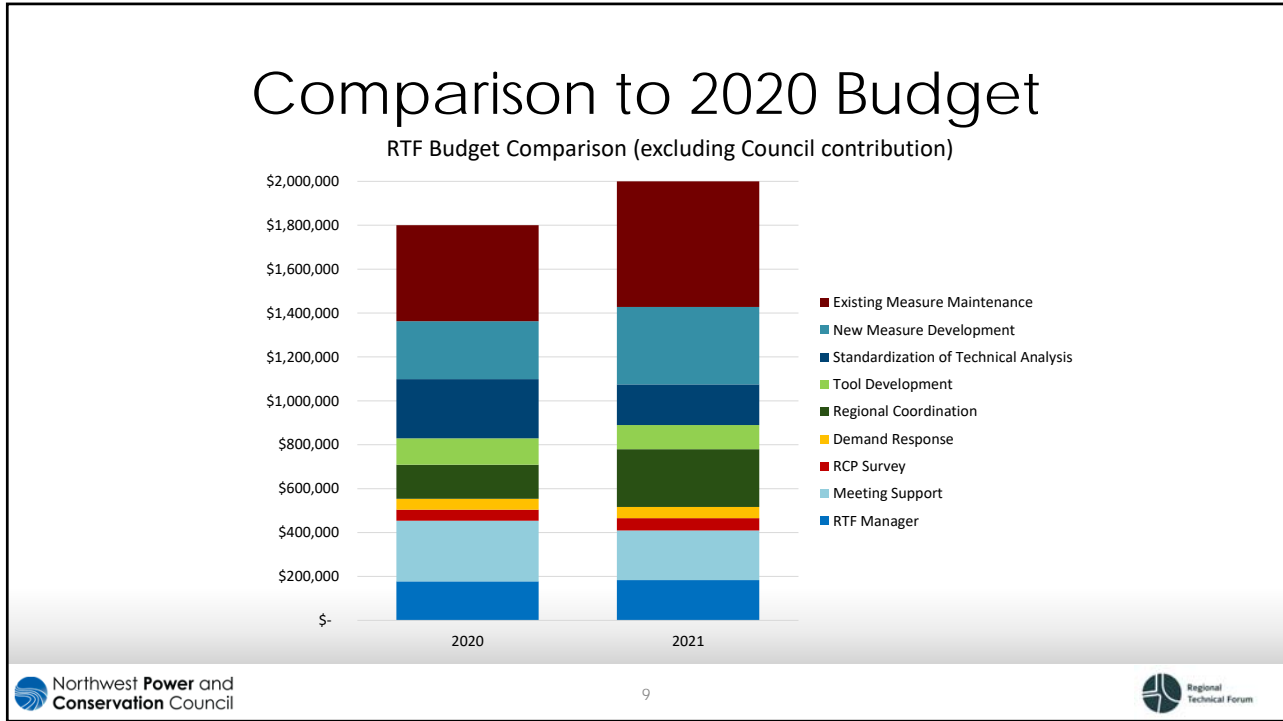
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Stakeholder Comments +

- Received comments from Bonneville*
 - Increase allocation to research coordination to support more engagement in RBSA work
 - Reallocate funds from meetings to other areas in anticipation of virtual meetings continuing next year
 - Sub-regional market work has implications and would benefit from a policy discussion at the RTF PAC first
 - Increase allocation to market analysis funding in support of review for the momentum models
 - Provide more clarity in the funding related to carryover/rollover funds
- Additionally, staff reconsidered a couple categories around tool development and load shape work

**This is Jennifer's interpretation of the comments*

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Measure Development (55%)

- **This category includes:**
 - Updating existing measures and adding new ones
 - Team collaboration/review of analysis
- **Main updates from 2020:**
 - Increase in number of existing and new measures
 - Reduction in “standardization of technical analysis” due to completion of work in 2020
 - Use of carryover funds to support two specific projects
 - \$15,000 to support residential behavior project
 - \$15,000 to support variable speed drives analysis

Measure Type	Existing	New
Electric Only UES or SP	18	5
Dual Fuel UES or SP	10	2
Gas Only UES or SP	0	2

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Regional Coordination (13%)

- **This category includes:**
 - General research coordination
 - Supporting Council work and power plan findings
- **Main updates from 2020:**
 - Align funding with 2020 spending
 - Updated to address BPA comments
 - Increased regional coordination for RBSA support
 - Slight increase in market analysis support; plan to frame out sub-regional market research with RTF PAC
 - Use of carryover funds to support two specific projects
 - \$25,000 for review of 2019 CBSA data for RTF needs
 - \$100,000 to accelerate work with end use load research data



Other Workplan Categories

Tool Development (6%)

- **This category includes:**
 - Support for ProCost and building simulation models for EE and DR
 - Exploration of how to incorporate climate change into RTF work
- **Main updates from 2020:**
 - Updating ProCost post 2021 Plan to reflect findings
 - Enhancing residential building simulation model to improve analysis for both energy efficiency and demand response

Management and Admin (23%)

- **This category includes:**
 - Support for meetings (members, minutes, etc.)
 - Regional Conservation Progress survey
 - RTF Manager
- **Main updates from 2020**
 - Increases to account for inflation consistent with strategic plan
 - Reduction in meeting budget to reflect a mix of virtual and in person meetings

2021 Budget: Breakdown of Extra Projects

Category	Contract RFP	Contract Analyst Team Manager	Total Funders
2021 Funding Based on Strategic Plan Funding (Total \$1,845,000)			
Existing Measure Maintenance	\$126,000	\$431,200	\$557,200
New Measure Development	\$61,100	\$276,600	\$337,700
Standardization of Technical Analysis	\$0	\$185,000	\$185,000
Tool Development	\$20,000	\$90,200	\$110,200
Regional Coordination	\$0	\$138,000	\$138,000
Demand Response	\$25,700	\$25,700	\$51,400
Regional Conservation Progress	\$56,000	\$0	\$56,000
RTF Meeting Support	\$148,000	\$78,000	\$226,000
RTF Management	\$4,000	\$179,500	\$183,500
Additional Funding Proposed for 2021 (Total \$155,000)			
Existing Measures: Variable Speed Drive Analysis	\$15,000	\$0	\$15,000
New Measures: Residential Behavior Analysis	\$15,000	\$0	\$15,000
Regional Coordination: CBSA Analysis	\$25,000	\$0	\$25,000
Regional Coordination: Savings Shape Development	\$100,000	\$0	\$100,000
Total	\$595,800	\$1,404,200	\$2,000,000

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Questions/Decisions



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