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March 5, 2024

MEMORANDUM

TO: Council Members

FROM: Laura Thomas, RTF Manager

SUBJECT: Regional Technical Forum 2023 Annual Report

BACKGROUND:

Presenter: Laura Thomas, RTF Manager

Summary: The Regional Technical Forum (RTF) submits its 2023 Annual Report to the Council. The intention of this report is to update the Council and stakeholders about the RTF's activities from the previous year and provide a preview of the ongoing 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 2023, the RTF focused on its key function of ensuring that the current portfolio is based on the best available data and provides reliable energy savings estimates, and that number of measures continues to grow and expand to identify new opportunities adding a total of five new primary work products. Additionally, the RTF spent time aligning its tools used for measures, exploring opportunities beyond the unit energy savings measure, and gaining a deeper understanding of the electric vehicle market to determine the potential for a future energy efficiency measure.

At the meeting, staff will present to the Council the highlights from 2023 as captured in the Annual Report.

Relevance: The RTF is an advisory committee to the Council. It 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: B.2.7 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 2023 Annual Report provides work highlights and financials for the 2023 calendar year, as well as a preview of progress made in 2024.



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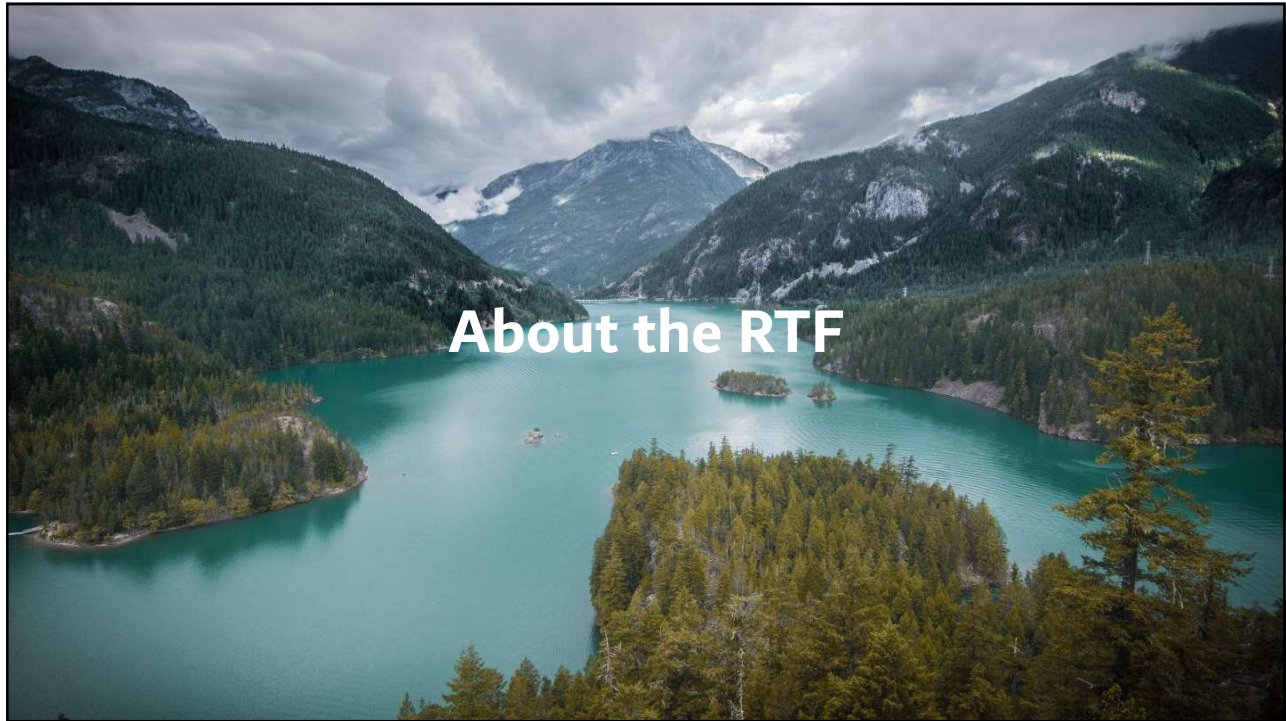
Presentation Overview

- Brief Background on the RTF
- 2023 Highlights
 - Expanded measure library and enhanced existing measures
 - Expanded the portfolio to add new measures
 - Beyond the measure work
- 2023 Financials







Regional
Technical Forum


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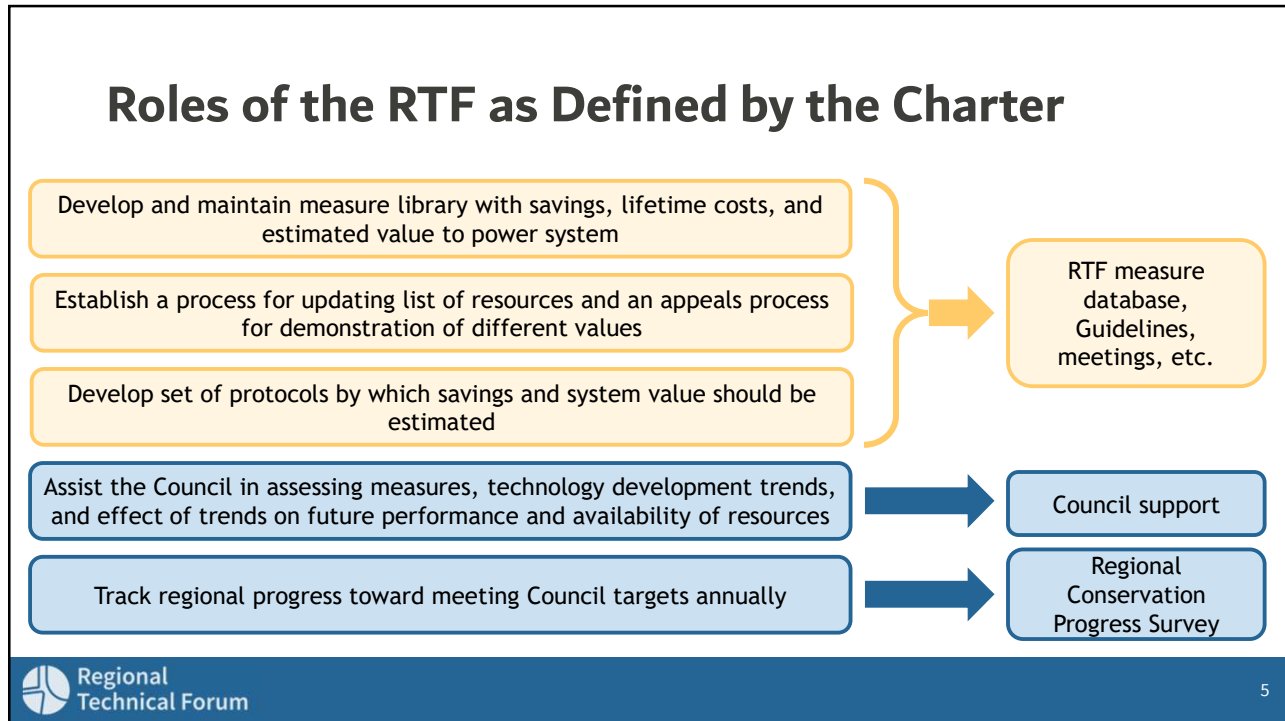
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Brief RTF History

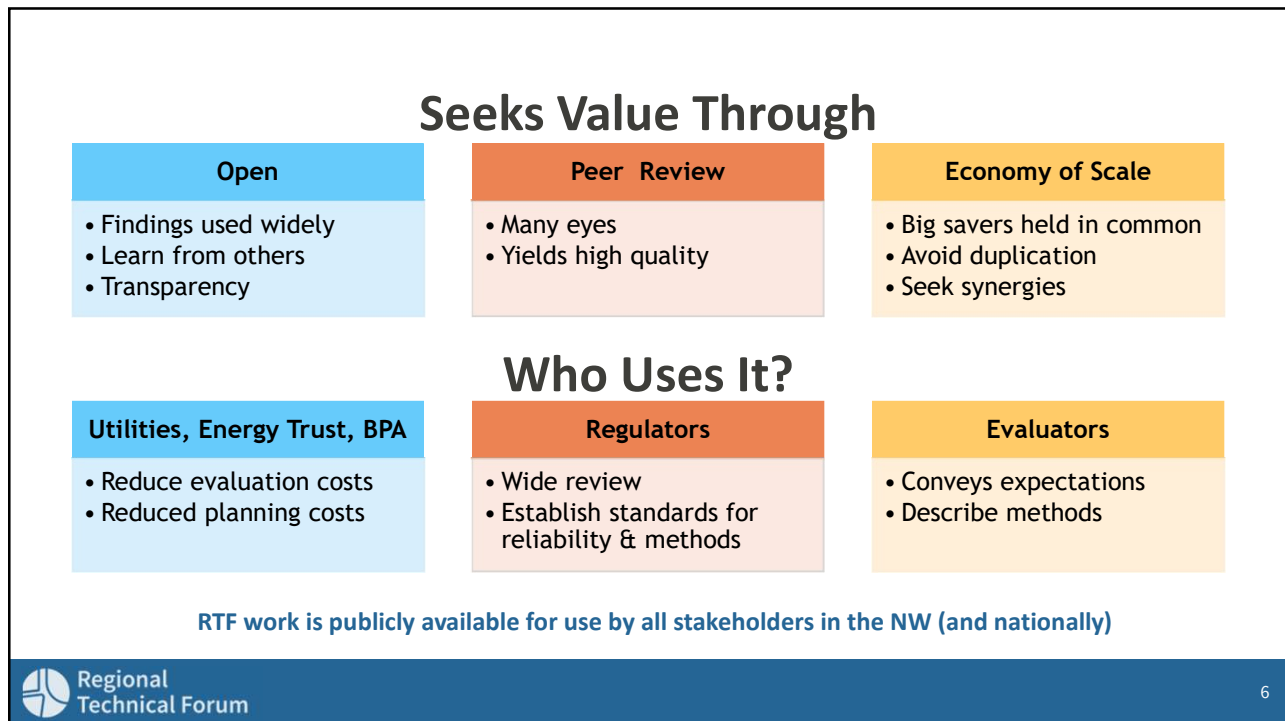
 1995 Bonneville shifted responsibility for financing and acquisition of conservation to its utility customers	 1996 Congress directed Bonneville and Council to convene a Regional Technical Forum in Senate Report 104-120	 1996 Northwest Governor's Comprehensive Review expanded the mission of the RTF	 1999 Council and Bonneville formed the Regional Technical Forum as an advisory committee to the Council
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 Regional Technical Forum

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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



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RTF Support



Chair Manager* Coordinator

Council Staff

- Manage the day to day of the RTF
- Provide a connecting role between the Council, RTF, and RTF PAC
- Chair the RTF
- Provide contracts, administration, finance, and other technical support

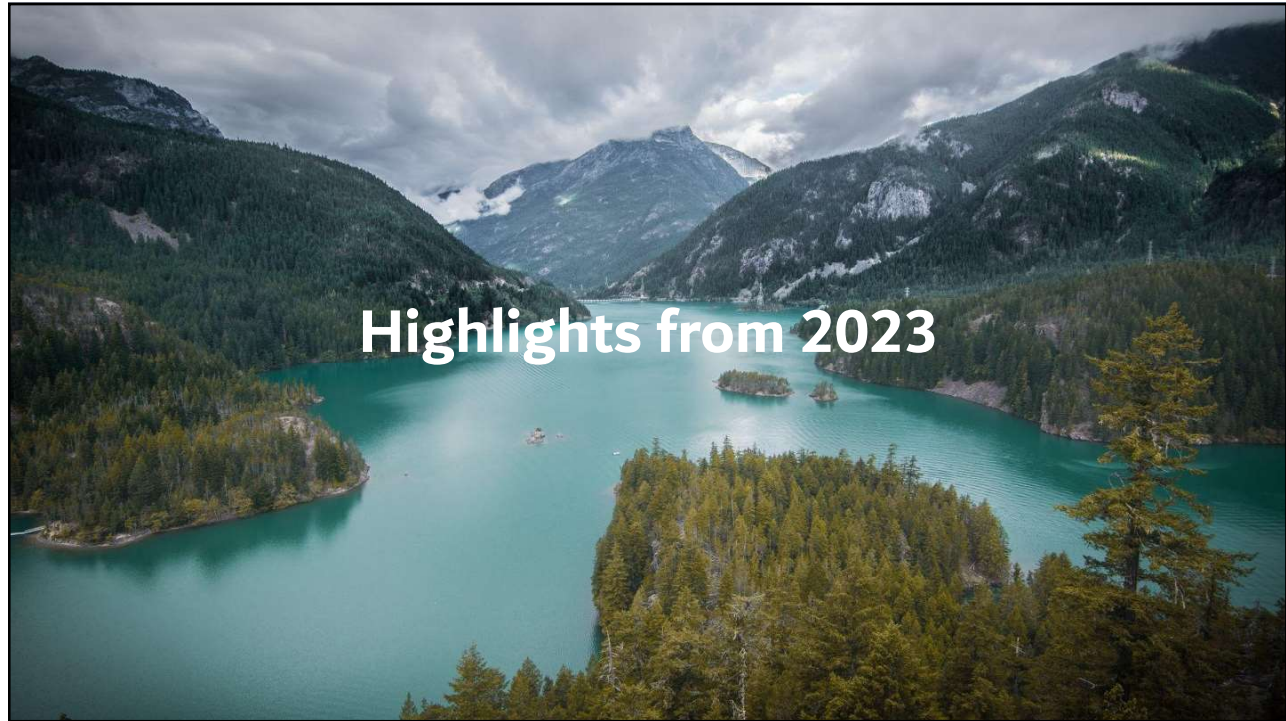
**Only position funded through RTF budget*



Contract Analysts Team

- Competitively bid contract positions
- Provide analytical support, work with subcommittees, and develop recommendations for RTF consideration
- Currently seven contract analysts

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Enhancing Existing Measure Portfolio

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



Commercial and Industrial Fans
• 182 aMW regional potential



Efficient Pumps & Circulator Pumps
• 103 aMW regional potential



Weatherization
• 232 aMW regional potential



Residential Lighting
• 45 aMW regional potential



Air Source Heat Pumps
• 416.1 aMW regional potential

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Expanding the Measure Portfolio

The RTF added three new measures and expanded one existing measure to include new applications. These included:



32.8 aMW regional potential

Packaged Terminal Heat Pumps in
Multifamily and Lodging/Residential
Case



6.5 aMW regional potential

Doorway Air Curtains



25 aMW regional potential

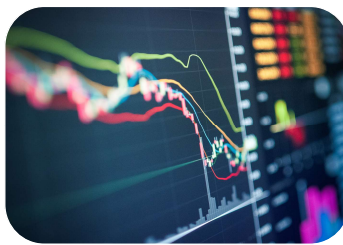
Efficient Spas

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Other RTF Focus Areas in 2023



Deep Energy
Interventions



Enhancing Tools



EV Market
Characterization

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Looking Ahead



- Continued work on the 2021 Power Plan recommendations, including:
 - Expanding demand response and energy efficiency interaction in measure work
 - Continuing to improve measure load profiles
 - Updating the RTF Guidelines
 - Valuing resiliency of energy efficiency measures during long term outage events
- Measure Portfolio Maintenance and Expansion
 - Updating air source heat pumps measures
 - Adding up to seven new measures

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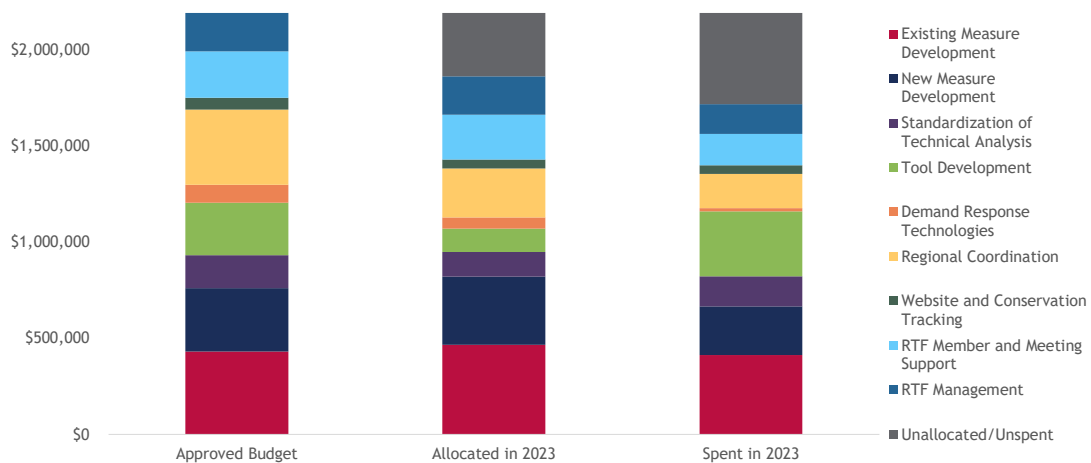
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Current Funding for the RTF

- In 2019, the RTF Policy Advisory Committee secured new five-year funding commitments for the RTF
- Added new funding sources:
 - Two new electric utilities
 - Natural gas efficiency programs
 - Portland General for DR activities
- Budget levels were developed based on ensuring core needs of library maintenance and addition of a few projects intended to support regional programs
- Funders agreed to managing the funding as a 5-year budget, allowing unspent funds to rollover to future years within this cycle

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2023 Year End Financials



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Unspent and Unallocated Funds in 2023

- The higher than usual unspent and unallocated funds in 2023 is due to a few reasons:
 - Delayed four projects to 2024 work plan, two of which accounted for half of the unspent funds
 - Contracts for two projects completed in 2023 ended up costing less than originally forecasted
 - Multiple projects were able to complete all the necessary work in 2023 about 20% under budget, including the transition to a new RTF manager
- The majority of these unspent funds have been allocated to the 2024 RTF Work Plan and will be used to complete delayed projects, support increased new measure development, and updating existing measures

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Thank you!

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