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May 15, 2015

**MEMORANDUM**

**TO: RTF Policy Advisory Committee**

**FROM: Jennifer Anziano**

**SUBJECT: Proposed Enhancement of Regional Conservation Progress Report**

Every year, the RTF tracks progress towards regional conservation targets through its annual Regional Conservation Progress (RCP) survey. This survey collects utility and NEEA savings and expenditures for the previous year. It also collects projection data (when available) for three years out. The data are collected from almost all the region’s utilities and reported at the sector level; commercial, residential, industrial and agriculture. The results of this survey are reported to the Council and the region every fall.

Over the past several years, Bonneville has contracted with Cadmus to conduct the Six Going on Seven Project. This project collected much more granular end use and measure level-data for efficiency programs for the previous year. These data allow for understanding progress on specific program and technology-level activities. Review of detailed measure-level data has proven to be very valuable to utility program managers, regulators and the Council staff. For example, the report gives insight to progress on heat pump water heaters and ductless heat pumps identified as emerging efficiency technologies like in the Sixth Power Plan.

Bonneville does not plan to continue to be the sole funder of the detailed data collection project going forward. The Council’s Conservation Resource Advisory Committee (CRAC) made a strong recommendation to continue the data collection and synthesis and that it would be a good fit for the RTF. There are benefits from combining these two data collection efforts to streamline data collection efforts while collecting more granular data for an enhanced RCP. This 2015 RTF Work Plan currently allocates $20,000 in contract funds (plus some contract analyst and Council in-kind support) to the RCP. Based on an initial proposal from Cadmus, enhancing the RCP to included detailed measure-level data is estimated to cost $50,000 (plus the same level of contract analyst and Council in-kind support. (*Note*: Significant resources went into developing the infrastructure and process for Bonneville’s data collection. If the RTF were to move forward, it would make the most sense for the RTF to sole source this work to Cadmus to leverage the existing infrastructure. It is likely this project would cost significantly more if another contractor were selected to perform the work.)

***Since this is not in the RTF work plan, we are seeking RTF PAC decision on whether we should expand the RTF scope (and budget) to include this enhanced data collection project.***

The table below outlines the proposed enhanced RCP data collection effort and identifies changes from the current scope of work in the 2015 Work Plan.

**Table 1:** Enhanced RCP and Changes from 2015 Work Plan

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|  | **Enhanced RCP** | **Change from 2015 Work Plan** |
| **Scope** | Measure/end use level savings and expenditures for 2014 | The current project only collects sector level data. This more granular data would allow for a better understanding of how the region is performing against the conservation targets. |
| *Projections:* Sector level savings and expenditures projections for 2015-2017 | No change. Given the uncertainty of projections, it does not make sense to collect more granular data |
| **Data Collection Process** | Bonneville would provide 2014 data for its utilities. The RTF would survey (via an excel survey tool) the IOUs and the mid-C utilities for 2014 (note, in past years, the RTF sent the Six Going on Seven survey tool out to IOUs alongside its regular RCP request). The RTF would reach out to NEEA to get the NEEA savings numbers. | The current work plan assumes that the RTF will collect data directly from each of the utilities using a tool developed and maintained by Synergy. Bonneville has (and can readily provide) the data required for its utilities. The RTF reaching out to IOUs and the mid-C utilities via an excel tool would not be significantly different from past years. There would be no change in how the RTF gets NEEA savings numbers. Note, this change would mean that the Synergy tool is no longer required for the RCP. |
| *Projections:* The RTF would send a small excel survey to all utilities to get 2015-2017 projections | The RTF would not be able to get this data directly from Bonneville, and therefore it would require the RTF to collect this data (as it has in the past). The RTF previously used the Synergy tool for collecting projections. Going forward, the RTF would collect this with via an excel survey tool. |
| **Analysis Process** | RTF will provide all data to Cadmus for aggregation and analysis. After analyzing data, Cadmus will prepare materials for reporting to the Council. Throughout, the RTF will review and oversee work. The RTF will also continue to update it long term tracking sheets (at the sector level) using the final data. | Previous analysis was supported by RTF contract analyst. This would shift that work to Cadmus, with the RTF role being one of QC and limited analysis.  |
| *Projections:* RTF would be responsible for analyzing projections. | No change. |
| **Budget** | $50,000  | This budget is $30,000 above the current RTF work plan. The $20,000 in the current work plan was intended for Synergy. The enhanced RCP would no longer require use of this tool, and the full $20,000 could be shifted towards the Cadmus contract. |
| **RTF Analyst / Council In-Kind Support** | The RTF will require contract analyst time for QC review and other analysis of the enhanced RCP data. The RTF will also require Council in-kind support for sending out the survey to non-Bonneville utilities and conducting follow up with those utilities. | It is expected that the contract analysts and Council in-kind support will be slightly reduced from past levels by having Cadmus do the primary data aggregation and analysis and Bonneville directly providing much of the data. Since this will be new, there will be some additional contract analyst efforts to incorporate the enhanced RCP data into the existing long term tracking sheets.  |
| *Projections:* Council in-kind support would be required to send the survey and conduct follow up. Contract analyst support would be required for analyzing the data. | No change. |

As noted in Table 1, the enhanced RCP would require an additional $30,000 in funds that are not currently in the RTF work plan. Table 2 below shows the breakdown of additional funding per sponsor, based on the existing allocations.

Table 2: Additional Funding Per Sponsor for Enhanced RCP



Alternatives:

* **The RTF could reallocate existing work plan to cover $30,000.**Currently, there is $46,700 of unallocated funds in the RTF 2015 work plan (not accounting the $20,000 intended for the RCP). This $46,700 consists of $30,000 for small/rural work plan items, $10,500 for tool development (SEEM/ProCost), and $8,300 for management items (annual report, audit).
* **The RTF could pursue the existing RCP for 2015 and build into the 2016 work plan sufficient funds for an enhanced RCP.**Based on the current year work plan, it is anticipated that these additional funds would require an offset of either QA/QC review, tools development, or contract analyst support.
* **The RTF could continue to pursue its existing RCP work with no enhancements this year or into the future**.