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August 27, 2015

**MEMORANDUM**

**TO: RTF Policy Advisory Committee**

**FROM: Jennifer Anziano**

**SUBJECT: Update on RTF’s Research Approach**

The purpose of today’s discussion is to update the PAC on changes to the RTF’s research approach since the May 15, 2015 meeting. Specifically, staff will brief the PAC on:

1. Creation of a Research Sponsors Group to convene regional research funders to discuss RTF research needs, identify topics of interest, and explore the potential to fund the research.
2. Restructuring of contract analyst team to support the RTF’s research coordination needs.

**Background**

At the May 15, 2015 meeting, the PAC discussed the RTF’s role in research (see the presentation linked from the May meeting [agenda](http://rtf.nwcouncil.org/rtfpac/meetings/2015/05/Default.htm) for more background). The discussion focused on changes in the RTF’s approach research for non-Proven measures. Non-Proven measures are those Planning and Provisional measures for which the RTF cannot establish a reliable savings estimate without further research. The changes in the RTF role are to:

* Better convey research needs to the regional entities that conduct research, without being overly prescriptive in the approach
* Clarifying limitations on the use of non-proven savings estimates without conducting the research to prove out the savings.
* Establish a means of helping to ensure that priority research questions get needed funding support by leveraging the PAC.

The PAC was generally supportive of this approach and recommended to the staff that they work with researchers and evaluators in the region with budget to help prioritize and get research funded. Staff created the Research Sponsors Group in direct response to this suggestion.

**Research Sponsors Group**

In June, staff kicked off a Research Sponsors Group. The purpose of this group is to provide a home for convening researchers and evaluators in the region to discuss RTF research needs, identify connections to their own existing or planned work, and make connections to other researchers that may want to coordinate on the work. To date, the group has met twice. The first meeting was a kickoff discussion with a small set of participants to develop a common understanding of the group’s function. The second meeting was for the full group to review the existing RTF research questions and begin identifying priorities and making connections to research in the region. We will brief the PAC on the research sponsors group meetings and seek feedback from PAC members.

**Contract Analyst Allocation**

In 2014, the PAC agreed to secure additional funding for the RTF to support the addition of a contract analyst focused on the research needs. In May, My Ton—the analyst contracted to fill this role—asked to be released from his contract. The RTF released an RFP in June to fill this vacancy, but did not find the appropriate fit. As a result, the staff is looking to fulfill the research role through a reallocation of the existing contract analyst team to support the research needs and leverage the qualified contractor pool to address any gaps created by this reshuffle.

Staff’s approach for meeting the research needs of the RTF is as follows:

* **Development of Research Strategies and Plans**: This work will to continue to be a team effort between lead analyst for a measure and a dedicated team research lead. The contract analyst identified as “primary” for a specific measure will be responsible for identifying data gaps and defining research objectives and the type of data that will help to inform reliable energy savings estimates. The team research lead will be responsible for reviewing all research strategies and plans across all measures, with a focus on research design and consistency across measures. Josh Rushton (contract analyst) has strong statistical and research design skills so he will be the research lead. Josh will also be responsible for engaging the Research and Evaluation Subcommittee to get their feedback and direction for research strategies and documents.
* **Research and Evaluation Subcommittee Engagement:** Initially, Jennifer will be responsible for process and strategic engagement with the R&E Subcommittee. She will work closely with Josh to increase his engagement and leadership with that subcommittee over time, as appropriate.
* **Research Sponsors Group:** Jennifer will continue to be responsible for managing the research sponsors group during its initial stages. Staff will revisit this at the end of 2015 to determine whether this responsibility should be handed off to Josh. Regardless, Jennifer and Charlie will continue to monitor this group to ensure that it is meeting the needs identified and providing a useful added role.
* **Creation of a Statistical and Research Methods Group:** With Josh filling a more research focused role, he will be launching a group to discuss statistical and research methods. Josh, based on discussion with some RTF members, has been interested in convening such a group for a while now. The focus would be to explore questions around how to use statistical and research methods to improve the reliability of energy savings estimates. Jennifer will monitor this work to ensure it is providing a value add and not becoming duplicative to other work in the region.
* **Coordination with Regional Research:** There is a lot of research happening in the region that the RTF will continue to monitor. Specific research groups and topics include:
  + ***Northwest Research Group (NWRG is convened by NEEA):*** Jennifer will be monitoring this group to connect research to RTF measures and help ensure that RTF work (such as the Research Sponsors Group and the new Statistical Research Methods Group) does not become duplicative.
  + ***Regional Emerging Technologies Advisory Committee (RETAC is convened by NEEA and BPA):*** Charlie will continue to engage with RETAC to connect any research to RTF measure development.
  + ***Momentum Savings Research (now conducted by BPA)***: Bonneville’s momentum savings research has great potential to inform baseline assumptions for measure development. The development and review of these estimates will take on increasing importance in the region and the RTF may engage more in review of savings estimates. Jennifer will monitor this work. Ryan Firestone (contract analyst) will be asked to be a primary touch point between momentum savings work and the RTF. In this role, Ryan will help to connect momentum savings research to RTF measures and coordinate review and feedback. The Council staff will also continue to engage on the momentum savings research and review.

To successfully meet the work plan goals under the above approach, the RTF will need to rely more on contract RFP funds for specific projects. Since coming on board, Josh has conducted statistical analyses in support measure development on a variety of projects (ex: regression analysis to support SEEM calibration and billing analysis for specific measures). While Josh will continue to support measure development in this way, we anticipate that we will need to use the qualified contractor pool to find support for specific measure development. Additionally, for a handful of measures, Josh was responsible for developing the measure from the ground up. Going forward, we will rely on the rest of the contract analyst team and the qualified contractor pool to fill this role to achieve work plan goals.

While Ryan picking up the momentum savings piece is a smaller shift, we still anticipate leveraging the contract RFP funds to offset his work. Specifically, Ryan currently co-chairs the Small/Rural Subcommittee. This is a good opportunity to identify a contractor that would have more focused time for that subcommittee and enable Ryan to focus more on momentum savings support and other measure development.

The plan is to roll out these changes and monitor the progress for the remainder of 2015, with a specific focus how this path compares to a more streamlined approach of an additional contract analyst. (Note: The RTF is still interested in identifying another contract analyst to better fill the gaps on the team for 2016). The key aspects to monitor will be whether these changes allow sufficient support for the research role without leaving other gaps in the work plan. Additionally, we will be assessing any additional management and administrative burden of this approach.