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April 30, 2008

MEMORANDUM

TO: Council Members

FROM: Tom Eckman

SUBJECT: Overview of Regional Technical Forum

In 1996, Congress directed Bonneville and the Northwest Power Planning Council (Council) to convene a Regional Technical Forum (RTF) to develop standardized protocols for verifying and evaluating conservation savings. Congress further recommended that the RTF's membership include individuals with technical expertise in conservation program planning, implementation, and evaluation and that its services be made available to all utilities in the Northwest.

The Comprehensive Review of the Northwest Energy System (Comprehensive Review) supported the Congressional directives and additionally recommended that the RTF track conservation and renewable resource goals and provide feedback and suggestions for improving the effectiveness of conservation and renewable resource development programs in the region. The Comprehensive Review also recommended that the RTF conduct periodic reviews of the region's progress toward meeting its conservation and renewable resource goals at least every five years and communicate recommended changes to appropriate decision makers.

After twice soliciting public input on its potential role and function, the Council formed the RTF as one of its standing advisory committees in the fall of 1999.¹ Since its conception, the RTF has provided Bonneville and the region's utilities with a wide range of technical and analytical support, including:

- Regional cost-effectiveness methodology and software
- Comprehensive database of cost-effective conservation measures and practices
- Standardized protocols for estimating savings from measures and efficiency programs

¹ See: Draft proposal for *Initiating the Regional Technical Forum* (Council Document 98-18) and *The Regional Technical Forum and Bonneville's Conservation and Renewable Resource Discount: How Should the RTF be Structured?* (Council Document 99-1)

- Creating a petition process through which utilities/vendors can propose new measures or savings verification protocols or request modification to the cost and savings assumed for existing measures or savings verification protocols
- Developing and maintaining program technical specifications and quality control criteria
- Maintaining an Internet-based system for Planning, Tracking and Reporting (PTR) regional conservation progress, including both savings and expenditures

The staff's presentation will expand on the role the RTF serves with Bonneville and the regional utility conservation programs. In addition, staff will also provide further information on how the RTF technical work is being funded and the manner in which it is carried out.



The Role of the Regional Technical Forum in PNW Energy Efficiency Programs

May 14, 2008



What You're About to Hear

- Who Are Those Guys?
- What's Their Role?
- How Do They Make Decisions?

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RTF - Origin and Function

- 1996 Congress charged Council and Bonneville with formation of a **Regional Technical Forum (RTF)** on conservation evaluation and verification
- Northwest Governor's Comprehensive Review Expanded RTF's Mission
 - Task 1 - **Track regional progress** toward conservation and renewable resource goals
 - Task 2 - **Provide feedback and suggestions** for improving conservation and renewable resource development programs in the region
 - Task 3- **Conduct periodic reviews** of the region's progress
 - Task 4 - **Communicate recommendations** to appropriate decision-makers

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Council Action

- **Formed** Regional Technical Forum in July of 1999
 - Advisory Committee to Council
- **Members:**
 - Appointed by Council Power Division Director
 - Technical expertise/experience required, not "constituent based"
 - Utilities, State Energy Office, energy service companies, consultants and public interest groups, and Bonneville
- **Staffing:** Council staff support the work of Forum (under Council budget)
- **Technical Support:** RTF retains outside consultant services when special expertise is required (under RTF sponsorship)
- **Public Involvement:** All meetings noticed w/ agenda & work products available on Web:
(<http://www.nwcouncil.org/energy/rtf/Default.htm>)

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How the RTF Performs Its Technical Work

- Staff support
 - Council staff serve as Chair & Co-Chair & provide majority of technical support
 - » Staff time covered by Council budget
 - Bonneville provides limited technical staff support
 - RTF recently approved contract for consultant technical and management support (approx. 0.5 FTE)
- RTF members are volunteers
 - Some members receive “honoraria” for time spent on RTF tasks (meetings, special assignments) if not otherwise compensated by employer
- RTF retains outside consultant services when special expertise is required
- RTF approves annual work plan & budget and authorizes all expenditures

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RTF's Role in Bonneville Programs

- In late 1999 Bonneville asked Council to charge RTF with task of providing specific recommendations regarding the implementation of its rate discount program
 - List of “eligible” measures
 - Savings
 - Value to Bonneville
 - Etc.

(To view BPA's complete request see: <http://www.nwccouncil.org/energy/rtf/charter.htm>)
- Bonneville has subsequently relied on the RTF to:
 - Review and maintain a database of cost-effective energy efficiency measures for use in its programs
 - Screen new energy efficiency measures/practices for technical viability and cost-effectiveness
 - Maintain technical program specifications
 - Assist in developing technology assessments and program evaluation designs

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RTF's Regional Role

- **Provides regional cost-effectiveness methodology and software**
 - Incorporates Council Plan results
- **Maintains a comprehensive database of cost-effective conservation measures and programs** that contains estimated:
 - Incremental cost
 - Savings (kWh & KW)
 - Benefit/Cost Ratios
 - » Wholesale and retail utility perspectives
 - » Regional perspective
 - Carbon reduction (lbs over life of savings)

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RTF's Regional Role (2)

- **Provides standardized protocols** for estimating savings and regional power system value for measures/programs not in the database
- **Maintains a "petition process"** through which utilities/vendors can propose new measures or savings verification protocols or request modification to the cost and savings assumed for existing measures or savings verification protocols
- **Performs ongoing updates** of database as technology and standard practices change

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RTF's Regional Role (3)

- **Develops and Maintains Program Technical Specifications and Quality** control criteria
- **Internet-based System for Planning, Tracking and Reporting regional conservation progress** including both savings and expenditures
 - RTF maintains technical database
 - BPA paid for development and ongoing maintenance
 - Now used for many BPA “back-office” functions, e.g., custom project review and approval, invoicing, etc.
 - Will be used by Washington utilities covered by I-937 to report conservation savings to state auditor/CTED

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What the RTF Does Not Do

- Perform any regulatory function
- Set measure credit/reimbursement levels for Bonneville or any other utility programs
- Establish Bonneville program reporting requirements and/or schedules
- Restrict which measures utilities can install
- Require the use of specific program designs
 - except for technical and quality control requirements

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5th Plan Set Forth Two Tasks Related to Regional Technical Forum

- “. . . establish a mechanism and funding to track and report regional conservation investments and accomplishments annually.”
- “. . . define the role, funding, and structure of the Regional Technical Forum.”

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Progress to Date

- After public review Council determined RTF should maintain its original role and structure
- RTF secured stable external funding of approximately \$300,000/yr for three year period (2007-09) through sponsorship system by Bonneville, the region's large utilities & Energy Trust of Oregon

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Progress to Date (2)

- RTF Online Planning, Tracking and Reporting (PTR) System has been modified to permit tracking of “utility funded” conservation activities and well as Bonneville funded activities
- PTR System has now been moved to a dedicated “server” at Council to permit additional system enhancements and facilitate data analysis

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Regional Technical Forum 2008 Budget

Task/Work Element	Estimated Budget	Share of Total
Review of Regional and Extra-Regional Impact Evaluations of Existing or Potential Deemed Measures	\$35,000	11%
Ductless Heat Pump Savings Impact Evaluation - SOW Development	\$29,000	9%
Commercial Packaged Roof Top Air Conditioning - Scoping Phase III	\$25,000	8%
Vending Machine Market Characterization Research	\$30,000	9%
SEEM User Interface Programming	\$12,000	4%
Emerging Technology Review	\$30,000	9%
Manufactured Housing Baseline Field Evaluation	\$10,000	3%
Technical Support Contracts	\$50,000	15%
Member Contract Support	\$75,000	23%
Regional Conservation Progress Tracking Support	\$15,000	5%
Meetings	\$15,000	5%
Total	\$326,000	100%

Work elements highlighted in yellow are underway

Regional Technical Forum Annual Sponsorships 2007 - 2009

Organization	Sponsorship	Status
Bonneville Power Administration	\$125,000	\$125,000
Energy Trust of Oregon	\$35,000	\$35,000
Puget Sound Energy	\$30,000	\$30,000
Idaho Power Company	\$25,000	\$25,000
Seattle City Light	\$20,000	\$20,000
Avista	\$15,000	\$15,000
PacifiCorp (Outside Oregon)	\$15,000	\$15,000
Snohomish PUD	\$15,000	\$15,000
Tacoma Power	\$10,000	Pending
NorthWestern	\$5,000	Pending
Eugene Water and Electric Board	\$5,000	\$5,000
Total	\$300,000	\$285,000

Value of RTF to Region

- Leverages utility investments in technology evaluation
- Provides centralized source of “peer reviewed” cost and savings assessments
 - Reduces “regulatory” debates/costs
- Serves as “clearinghouse” for vendors of new technologies
- Expands region’s technical assessment capabilities and knowledge base

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