

Performance Tested Comfort Systems (PTCS)

Program Simplification, Improvement and Next Steps

Residential HVAC Team

December 1, 2016



Energy Efficiency Residential HVAC Team

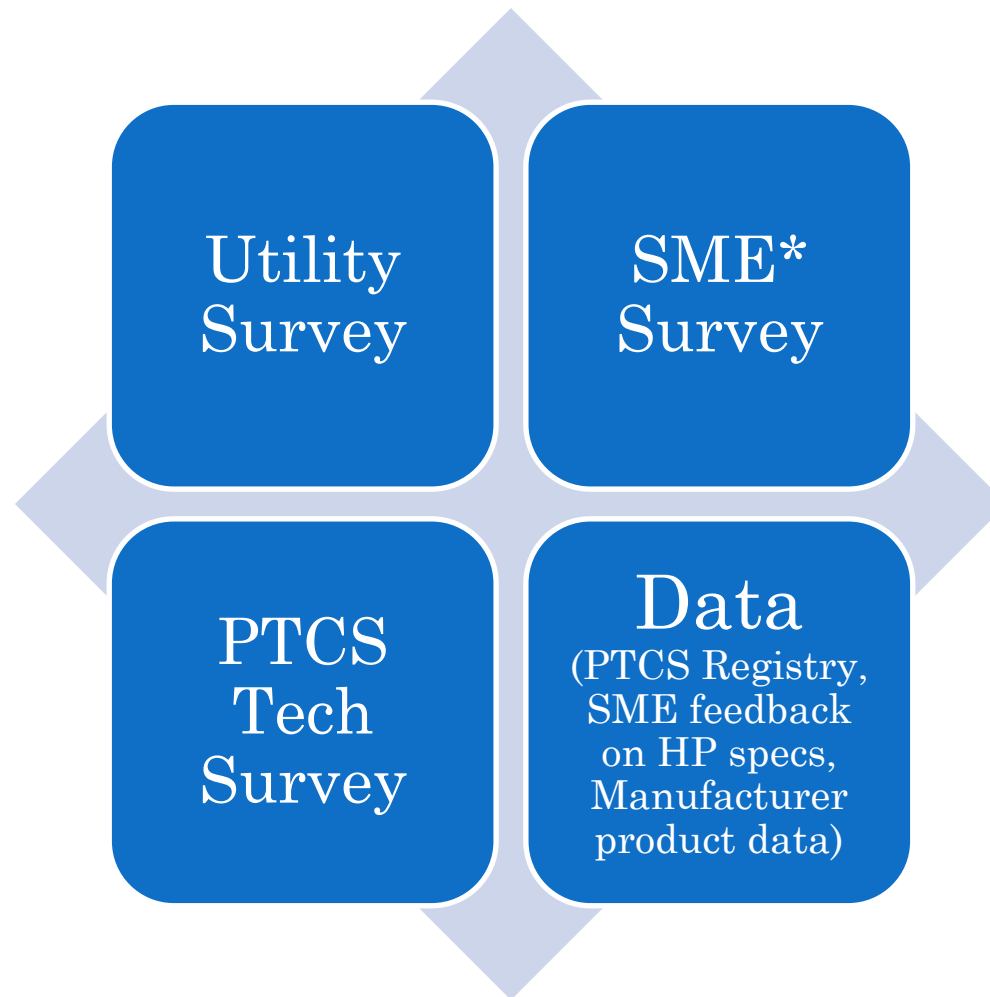
- **Gary Smith** – Acting Residential Sector Lead
- **Jessica Kramer** – Senior Program Support
- **Amy Burke** – Program Support and PTCS Registry SME
- **Jim Haberman** – HVAC Systems Technical Support



Agenda

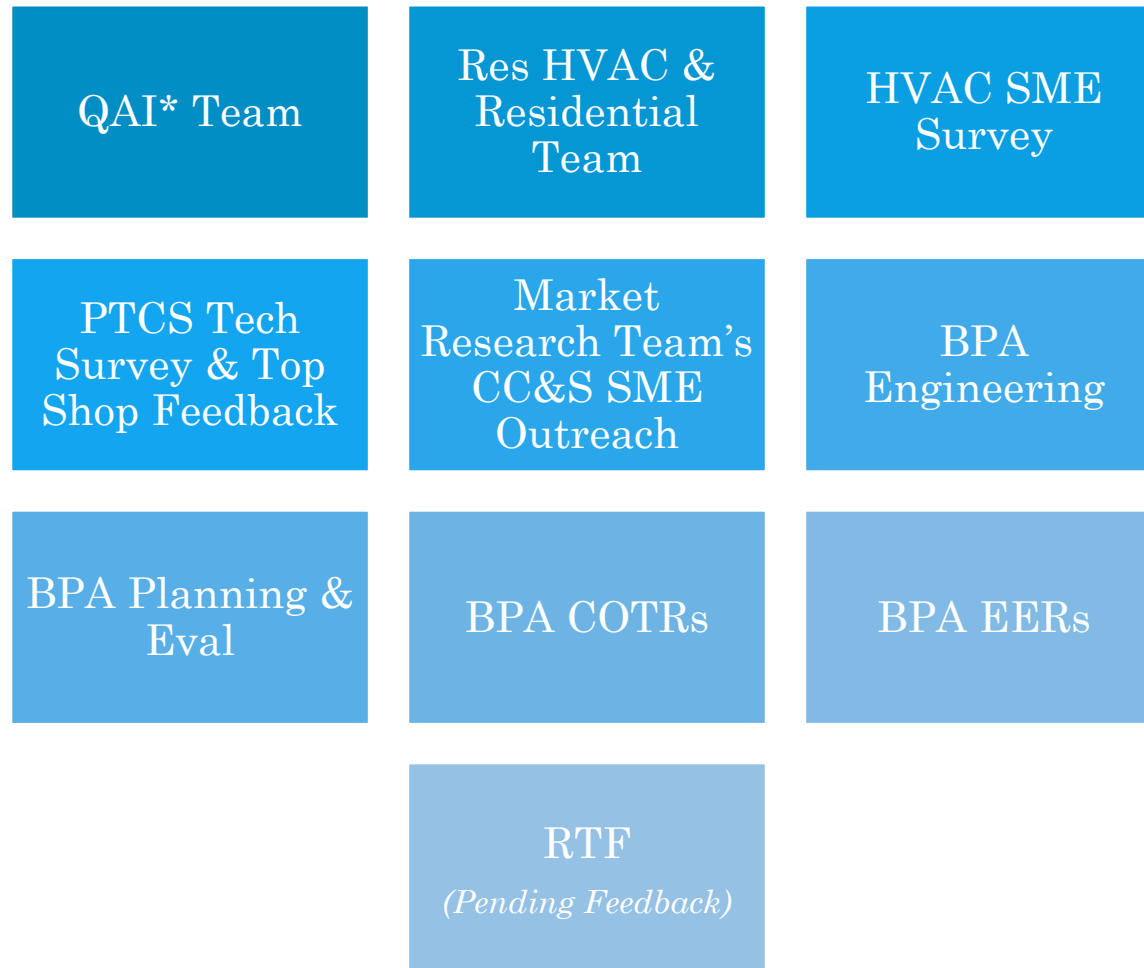
- What: Improve PTCS Program
- Why: Feedback has been “Simplify and Streamline PTCS”
- How: Survey Outreach & Data Analysis Activities
- Who: Internal and External Stakeholders
- Big Takeaways
- Ideas and Areas to Improve
- Next Steps

How: Outreach Activities



**Subject Matter Expert*

Who:



**QAI Team: Utility & CLEAResult Quality Assurance Inspectors*

Big Takeaways from Surveys

- More PTCS trainings are needed
- Technical training for technicians (continuing ed)
- Less paperwork
- Easier online PTCS registry entry
- More marketing pieces building program awareness
- Simplify specifications
- More Quality Assurance inspections
- Consistency among Residential and Commercial programs
- Higher incentives

Big Takeaways from Data

- PTCS Registry and Quality Assurance Inspection grading scale highlights:
 - Specification areas that generally pass or fail inspections
 - Specification areas that need improvement
- Manufacturer data help to determine what specification areas are outdated

Program Areas to Improve: Top Priorities



- **Certification Training**

- Be a better matchmaker between techs and trainers
- Create better awareness of connection between utilities and trainers
- Remote live training given by BPA and/or trainers
- Address required testing equipment costs
- Regular trainer check-ins

- **Technical Training**

- Promote information about existing webinars
- Focus on top failure rate issues and how to address them

Program Areas to Improve: Top Priorities



- **Reduce Paperwork Requirements**
 - Remove AHRI Certificate IM requirement
 - Research simplifying the Sizing Calculator/Graphs
 - Analyze installation forms to align them with online registry
- **Air Source Heat Pump Specification Analysis**
 - Remove and/or modify requirements that are outdated, unenforceable requirements, or have minimal impact to savings
- **Create Consistency Where Possible Between Residential and Commercial HVAC Programs**

Air Source Heat Pump Spec Analysis

- **Focus on energy savings**
- **Streamline and simplify**
- **Recommendations** to stay, remove, modify, or move to “Best Practice”
- **Reminder:** utilities can require more of their own specifications in addition to the PTCS spec



Air Source Heat Pump Recommendations

Current Spec	Recommendation	Reasoning
Spec 4: Auxiliary Heat Sizing (125% or less)	Move to Best Practice	<ul style="list-style-type: none"> Tied to respective utility needs
Spec 6: Penetrations	Move to Best Practice	<ul style="list-style-type: none"> Mostly an industry norm Very low program QA failure rate
Spec 7: Indoor Thermostats	Remove	<ul style="list-style-type: none"> Current thermostats are designed with an auto-changeover feature
Spec 8: Compliance with Codes and Manufacturer Requirements	Remove from Specifications and continue to keep it in PTCS Participation Application	<ul style="list-style-type: none"> Duplicative requirement



Program Areas to Improve: Longer Term Priorities



- Work with trade schools to offer training
- Partner with distributors for outreach and create webinars
- PTCS Online Registry:
 - Make mobile friendly and a vehicle for less paperwork
 - Streamline entry and notification of installation entry to utilities

Next Steps



- December 15: Deadline to gather feedback
- December 16 – January 15: Review time period
- January 15 – March 31: Prepare any IM notifications
- April 1: IM notice deadline

In the meantime, we can start working on some of the quick wins starting in CY 2017!

Discussion and Questions



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