

# 2018 Advanced ASHP Workshop

## Summary Report

UC Davis – Western Cooling Efficiency Center – December 6-7th, 2018

Christopher Dymond – Northwest Energy Efficiency Alliance

Dave Lis – Northeast Energy Efficiency Partnerships

Ian Blanding – Midwest Energy Efficiency Alliance

This report describes a workshop of utility and decarbonization NGO's that gathered at UC Davis to share knowledge about what we know about ASHPs, their future potential and begin collaborating on getting the products we need into the market over the next 5-12 years. Special thanks to the folks at the UC Davis' Western Cooling Energy Efficiency Center, Dr. Reinhard Radermacher and the Sacramento Municipal Utility District for their support of this workshop.

### Contents

|   |    |
|---|----|
| Event Summary .....                             | 1  |
| Committees.....                                 | 3  |
| Shared Resources.....                           | 8  |
| Workshop Attendees .....                        | 8  |
| Invitation - Event Description and Context..... | 9  |
| Workshop Agenda.....                            | 10 |
| Photos of Breakout Notes.....                   | 11 |

### Event Summary

Over thirty organizations attended the event, representing utilities and NGOs (see attendance list) with representation from all parts of US and Canada. The primary goal of the event was to establish a coordinated effort to advance performance, metrics and data collection that form the basis of utility and decarbonization activities on heat pumps. The 1½ day event was source fuel agnostic, though given the limited current available natural gas driven heat pumps much of the discussion focused on the near term prospects for electrically driven air source heat pumps. The outcomes were as follows:

- Attendees are familiar with what others are doing and what is possible
- Agreement on what is needed to make a business case for improved metrics and testing
- Draft a “roadmap specification<sup>2</sup>” that defines the key elements desired in an advanced ASHP
- Commitment to collaboration on lab and field testing activities and specification development
- Process for coordinating activity going forward

The event began with a keynote presentation by Dr. Reinhard Radermacher of the University of Maryland on the technological improvements and potential for this technology and the potential as one of the top 3 solutions (electric vehicles, renewable generation, and heat pumps) to decarbonize our energy sources. Four subsequent presentations covered what is known about current heat pump performance, metrics and practical application for space heating and cooling in a variety of climates. These presentations provided solid context that our current ability to predict the energy savings potential of air source heat pumps is poorly represented by the AHRI 210/240 test procedure for SEER and HSPF.

During the remainder of the workshop attendees participated in a series of “World Café” exercises and breakouts that crafted vision and understanding of what utilities and decarbonization efforts needed from heat pumps in the 5-12 year horizon. This was then used to define the market and technology challenges that need to be overcome for these visions to become reality. During the final sessions attendees defined 4 focus areas. Committees were formed for each focus area where the top priorities, tasks, timelines, and dependencies were identified and placed in a summary table.

Feedback from attendees was very positive. People expressed a much better understanding of what is possible, current limitations of existing metrics, and a general agreement to continue collaborating on tasks through the committees. The next step opportunity where many of the participants will be gathering is at the 2019 Renewable Heating and Cooling Workshop hosted by NEEP in late May. A Dropbox™ location has been setup by NEEA where the interested can find copies of presentations given and the supporting documents.

## Next Steps

No formalized structure was established, but genuine interest was expressed to form some kind of coalition or establish a “heat pump association” that can serve as a host for the collective collaboration needed. For the present, anyone who expressed interest in promoting better metrics, working with manufacturers on a 5-12 year roadmap specification and assisting with field and lab testing are now part of a loosely defined “**Advanced ASHP Coalition**”.

Each of the four committee’s agreed to continue collaborative coordination by hosting occasional conference calls in support of continue collaboration. The following are venues where some of the people involved hope to convene formal or informal meetings.

1. AHR Expo 2019 – Atlanta January 14<sup>th</sup>
2. NEEP Renewable Heating and Cooling Workshop - TBD
3. CEE Summer Workshop – TBD

## Committees

Four different committees were established to pursue collaboration and provide guidance toward the overall goal. While there was a strong recognition that these focus areas were not sufficient to address all issues, it was agreed these 4 focus were the simplest structure for future collaboration on the broader overall goal of advancing real world performance and acceptance of air source heat pumps. The four committees and their volunteer members are shown below with names in **bold yellow** agreed to be committee co-leads.

### Committee Members

| Accurate Test Procedure | Equipment Roadmap Spec    | Design & Install Spec | Consumer & Installer Understanding |
|-------------------------|---------------------------|-----------------------|------------------------------------|
| Christopher Dymond      | Jerine ahmed              | <b>Mark Alatorre</b>  | <b>Suzi Asmus</b>                  |
| <b>Gary Hamer</b>       | Mark Alatorre             | Suzi Asmus            | Andrew Belden                      |
| Bruce Harley            | Nick Dunfee               | Mark Baines           | Nick Dunfee                        |
| Marshall Hunt           | <b>Christopher Dymond</b> | Andrew Belden         | Todd Greenwell                     |
| David Lis               | Todd Greenwell            | Nick Dunfee           | Owen Howlett                       |
| Joanna Mauer            | Gary Hamer                | Christopher Dymond    | David Lis                          |
| Mark Modera             | Bruce Harley              | Bruce Harley          | Cheryn Metzger                     |
| Jonathan Moscatello     | Randall Higa              | <b>Bruce Manclark</b> | Jonathan Moscatello                |
| Reinhard Radermacher    | <b>David Lis</b>          | Cheryn Metzger        | Brenda Pike                        |
| <b>Mvuala Suami</b>     | Cheryn Metzger            | Mark Modera           | David Poderson                     |
|                         | Jonathan Moscatello       |                       | Arun Vedhathiri                    |
|                         | Chris Perry               |                       | David Poderson                     |
|                         | Reinhard Radermacher      |                       | Andrea Salazar                     |
|                         | Andrea Salazar            |                       |                                    |
|                         | Mvuala Suami              |                       |                                    |
|                         | Robert Weber              |                       |                                    |
|                         | Jay Stien                 |                       |                                    |

### Summary Pages

Each groups established a leader, defined the end state vision, and identify top priority tasks, sub-tasks, and leads. The following 4 pages contain the contents of these initial collaborative meetings, the spreadsheet that contains these tasks, and committee member contacts and details can be found in the NEEA **Advanced ASHP Coalition** dropbox™.

| Accurate Test Procedure                       |  |  |     |         |   |  |                      |
|---|--|--|-----|---------|---|--|----------------------|
| Problem                                       | Existing Tests do not characterize cold weather performance, part load and variable capacity benefits of VCHPs |  |     |         |   |  | Members              |
| Vision  | In 5 years, CSA EXP07 is adopted and broadly used by insustry (regulators, mfrs, utility programs, cities      |  |     |         |   |  | Christopher Dymond   |
| Lead(s)                                       | Muuala Suami   |  |     |         |   |  | Gary Hamer           |
| Key Challenges                                | Getting critical buy-in from market influencers (NRCan, CEC, ResNet, Hot2000, EE Program Mgrs)                 |  |     |         |   |  | Bruce Harley         |
| Task  | Subtasks   | Start  | End | Leader  | Contributors                            | Notes  | Marshall Hunt        |
|   |  |  |     |         |   |  | David Lis            |
| Validate Test Procedure to field performance  | Indetify min M&V spec for gathering central collection, anonamous data, etc.                                   | Q1 2019  |     | NEEA    | BC Hydro                                | Bruce Wilcox, Ecotope,                                       | Joanna Mauer         |
|   |  |  |     |         |   | Frontier (Hugh Henerson)                                     | Mark Modera          |
|   |  |  |     |         |   |  | Jonathan Moscatello  |
| Secure Funds for Testing EXP07                | create funding mechanism   | Now  |     |         | NRCan, CEC, IOU, MOU, NEEA, SMUD, LADWP |  | Reinhard Radermacher |
| Testing to Characterize 3Rs                   | Expand Lab Sites   | Now  |     | Cdymond |   | Will Firmware updates will not affect performance negatively | Mvuala Suami         |
| - Repeatability                               | Round Robing testing   | Ongoing  |     |         |   | What equipment should be tested                              |                      |
| - Reproduceability                            | Compile and Analyze Data   |  |     | Bharley |   | Involve Purdue, U.Maryland, UL Plano, EPRI, ATS              |                      |
| Develop Value Proposition                     | Draft Value Prop   |  |     |         |   |  |                      |
| - Manfuacturer                                | Outreach to Title 24, Resnet   |  |     |         |   |  |                      |
| - Utility / EE Orgs                           | 1:1 Meetings with Mfr  |  |     | Cdymond |   |  |                      |
| - Codes & Standards                           | Devel ?? From test results   |  |     | Bharley |   |  |                      |
| AEDM Process Application                      | Generic Tstat selection spec   |  |     |         |   |  |                      |
| (alternative efficiency determination method) | for non-proprietary control  |  |     |         |   |  |                      |
| Other Notes                                   |  |  |     |         |   |  |                      |
|   | 1  | Current EXP-07 test takes about 1-week to complete heat and cool testing and costs ~\$30k ---- this could come down to \$20k, but will not likely reach the ~\$7k of the current HSPF + SEER testing |     |         |   |  |                      |
|   |  |  |     |         |   |  |                      |
|   |  |  |     |         |   |  |                      |

| Equipment Roadmap Spec              |  |             |         |         |               |       |                      |
|-------------------------------------|--|-------------|---------|---------|---------------|-------|----------------------|
| Problem                             | Imperfect and inconsistent specifications used by programs fail to effectively motivate manufacture's product development toward low energy/carbon solutions |             |         |         |               |       | Members              |
| Vision                              | In 5 years, programs will broadly promote a consistent spect driving accelerated adoption of "high performing" ASHPs - target audience = manufacturers       |             |         |         |               |       | Jerine ahmed         |
| Lead(s)                             | Dave Lis & Christopher Dymond  |             |         |         |               |       | Mark Alatorre        |
| Key Challenges                      | Getting commitment from 1-3 key manufacturers that see this value and agree to collaborate   |             |         |         |               |       | Nick Dunfee          |
| Task                                | Subtasks   | Start       | End     | Leader  | Contributors  | Notes | Christopher Dymond   |
|                                     |  |             |         |         |               |       | Todd Greenwell       |
| Define Value Propositions           | Draft VP   | Jan-19      |         |         |               |       | Gary Hamer           |
| - Programs                          |  |             |         |         |               |       | Bruce Harley         |
| - Manufacturers                     |  |             |         |         |               |       | Randall Higa         |
| - Contractors                       |  |             |         |         |               |       | David Lis            |
| - Customers                         |  |             |         |         |               |       | Cheryn Metzger       |
| Test Value Props                    |  |             |         |         |               |       | Jonathan Moscatello  |
| Meet with Manufacturers             | Invitations  |             |         | Cdymond |               |       | Chris Perry          |
|                                     | Initial Pitch  | AHR Expo 19 |         |         |               |       | Reinhard Radermacher |
|                                     | Identify enthusiastic  |             |         |         |               |       | Andrea Salazar       |
|                                     | Go meet with them  |             |         |         |               |       | Mvuala Suami         |
|                                     | Get feedback   |             |         |         |               |       | Robert Weber         |
| Define Elements of Specs            |  | Q1 2019     | Q1 2020 | Cdymond | CEE           |       | Jay Stien            |
| - Data Reporting Needs              |  |             |         |         | Manufacturers |       |                      |
| - Integrated Contols                |  |             |         |         |               |       |                      |
| - Performance tiers                 |  |             |         |         |               |       |                      |
| - Product features                  |  |             |         |         |               |       |                      |
| Get Programs to adopt specifiations |  |             |         |         | CEE           |       |                      |
|                                     |  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |
| Other Notes                         |  |             |         |         |               |       |                      |
|                                     | 1  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |
|                                     |  |             |         |         |               |       |                      |

## Design & Install Spec

|                                  |   |              |            |               |                     |  |                    |
|----------------------------------|---|--------------|------------|---------------|---------------------|--|--------------------|
| <b>Problem</b>                   | Insufficient Understanding of system design and best practices results in poor performance and inadequate customer experience   |              |            |               |                     |  | <b>Members</b>     |
| <b>Vision</b>                    | By 2020 a set of criteria and best practice guidelines for HVAC solutions are widely used that ensure 1) energy efficient, 2) grid supportive (alometric) 3) application agnostic |              |            |               |                     |  | Mark Alatorre      |
| <b>Lead(s)</b>                   | Mark Alatorre, Bruce Manclark   |              |            |               |                     |  | Suzi Asmus         |
| <b>Key Challenges</b>            |   |              |            |               |                     |  | Mark Baines        |
|                                  |   |              |            |               |                     |  | Andrew Belden      |
| <b>Task</b>                      | <b>Subtasks</b>   | <b>Start</b> | <b>End</b> | <b>Leader</b> | <b>Contributors</b> | <b>Notes</b>   | Nick Dunfee        |
| Create Decision Tree             | Decide Branches   |              |            |               |                     | check in early with manufacturers                        | Christopher Dymond |
|                                  | branch order, climate,  |              |            |               |                     |  | Bruce Harley       |
| Design use Cases                 | Prodcut   |              |            |               |                     | Use local ICC training to disseminate design guidance    | Bruce Manclark     |
|                                  | system types  |              |            |               |                     |  | Cheryn Metzger     |
|                                  | sizing  |              |            |               |                     |  | Mark Modera        |
| Develop guidance for contractors | climate specifics needed  |              |            | Utilities     |                     | need to closely collaborate with performance contractors | 0                  |
|                                  |   |              |            |               |                     | encourage Pay 4 Performance programs                     | 0                  |
| Develop Installation Specs       |   |              |            |               |                     | work with homebuilder associations                       | 0                  |
|                                  |   |              |            |               |                     |  | 0                  |
| Refine QA Specs                  |   |              |            |               |                     |  | 0                  |
|                                  |   |              |            |               |                     |  |                    |
| Get Industry Feedback            |   |              |            |               |                     | distributors, HVAC trades and Manufacturers              |                    |
|                                  |   |              |            |               |                     |  |                    |
| Conduct Q/A on Program Efforts   | installations, energy savings   |              |            |               |                     |  | 0                  |
|                                  | etc   |              |            |               |                     |  | 0                  |
| <b>Other Notes</b>               |   |              |            |               |                     |  | 0                  |
| <b>1</b>                         |   |              |            |               |                     |  | 0                  |
|                                  |   |              |            |               |                     |  |                    |
|                                  |   |              |            |               |                     |  |                    |

## Consumer & Installer Understanding

|  |   |              |            |                 |                                |   |                     |
|--|---|--------------|------------|-----------------|--------------------------------|---|---------------------|
| <b>Problem</b>   | Products can be discourage to consumer & installers. How can we understand consumer and customer needs and motivators and counter public perception that HPs cold and create a positive perception and preference for advanced ASHPs. |              |            |                 |                                |   | <b>Members</b>      |
| <b>Vision</b>  | Customers strongly prefer and desire heat pumps and are actively encouraged by knowegable contractors   |              |            |                 |                                |   | Suzi Asmus          |
| <b>Lead(s)</b>   | Suzi Asmus and Andy Belden  |              |            |                 |                                |   | Andrew Belden       |
| <b>Key Challenges</b>  |   |              |            |                 |                                |   | Nick Dunfee         |
|  |   |              |            |                 |                                |   | Todd Greenwell      |
|  |   |              |            |                 |                                |   | Owen Howlett        |
| <b>Task</b>  | <b>Subtasks</b>   | <b>Start</b> | <b>End</b> | <b>Leader</b>   | <b>Contributors</b>            | <b>Notes</b>  | David Lis           |
| Research Customer and Installer Perspectives and value proposition for various audiences   | Lit Review  |              | Dec-19     | Andrea          | Esource, CEE,                  |   | Cheryn Metzger      |
|  | Research Gap Analysis   |              |            |                 |                                |   | Jonathan Moscatello |
|  | Conduct Research  |              |            |                 |                                |   | Brenda Pike         |
| Establish Heat Pump Association  |   |              |            | NEEA/NEEP?      |                                | This is not only for consumer and installer understanding --- it would se | David Poderson      |
| Develop Marketing Campaigns  | Consumers   |              |            |                 |                                |   |                     |
|  | Installers  |              |            |                 |                                |   |                     |
| Deploy Marketing Campaign  |   |              |            | Heat Pump Assoc |                                | Need to find funders - Manufacturers? Utilities, REEOs?, States           |                     |
|  |   |              |            |                 | Carbon Neutral Cities alliance |   |                     |
| Follow-up and Feedback   |   |              |            | Heat Pump Assoc |                                |   |                     |
|  |   |              |            |                 |                                |   |                     |
|  |   |              |            |                 |                                |   |                     |
|  |   |              |            |                 |                                |   | 0                   |
|  |   |              |            |                 |                                |   | 0                   |
| <b>Other Notes</b>   |   |              |            |                 |                                |   |                     |
| 1 This team realized that for a broad market evaluation and general campagin, some kind of meta organization would be very valuable\ |   |              |            |                 |                                |   |                     |
|  |   |              |            |                 |                                |   |                     |
|  |   |              |            |                 |                                |   |                     |

## Shared Resources

### Shared Dropbox Folder

Following the event, NEEA established a dropbox folder where participants and invitees can find the presentations given, this report, and other supporting materials. Access to this dropbox is provide by contacting Christopher Dymond at NEEA ([cdymond@neea.org](mailto:cdymond@neea.org)).

A read only version can be found at the following link

<https://www.dropbox.com/s/wluzw58302z5lx3/Advanced%20ASHP%20Workshop%20v14.pdf?dl=0>

## Workshop Attendees

| First       | Last        | Organization                   |
|-------------|-------------|--------------------------------|
| Mark        | Alatorre    | CEC or PG&E                    |
| Suzi        | Asmus       | NEEA                           |
| Panama      | Bartholomy  | Building Decarbonization       |
| Ian         | Blanding    | MEEA                           |
| Scott       | Blunk       | SMUD                           |
| Abram       | Conant      | Proctor Engineering            |
| John        | Cymbalsky   | DOE                            |
| Pierre      | Delforge    | NRDC                           |
| Debbie      | Driscoll    | NEEA                           |
| Nick        | Dunfee      | TRC Solutions                  |
| Christopher | Dymond      | NEEA                           |
| Amy         | Egarter     | Rocky Mountain Institute       |
| Jackie      | Goss        | Energy Trust                   |
| Todd        | Greenwell   | Idaho Power                    |
| Gary        | Hamer       | BC Hydro                       |
| Bruce       | Harley      | Bruce Harley Energy Consulting |
| Randal      | Higa        | SCE                            |
| Carl        | Hiller      | formerly EPRI                  |
| Owen        | Howlett     | SMUD                           |
| Walt        | Hunt        | EPRI                           |
| Marshall    | Hunt        | PG&E                           |
| Ely         | Jacobson    | MEEA                           |
| David       | Lis         | NEEP                           |
| Bruce       | Manclark    | Clearesult                     |
| joanna      | Mauer       | ASAP                           |
| Cheryn      | Metzger     | PNNL                           |
| Mark        | Moder       | UC Davis                       |
| Jonathan    | Moscattello | TRC Solutions                  |
| Brenda      | Pike        | National Grid                  |
| Reinhard    | Radermacher | University of Maryland         |
| Andra       | Salazar     | Esource                        |
| Mvuala      | Suami       | NRCAN                          |
| Robert      | Weber       | BPA                            |
| Bruce       | Wilcox      | Wilcox Consulting              |
| Martha      | Brook       | California Energy Commission   |
| Chris       | Perry       | ACEEE                          |
| David       | Poderson    | Xcel Energy                    |



# Invitation - Event Description and Context

## What

This is a one-and-a-half-day invitation-only workshop on air-source heat pumps (ASHP) to share information and organize collective activities needed to advance ASHP technologies and improve market adoption.

## Who

Utilities, energy efficiency organizations, research organizations and technology experts who are involved in program development, strategy, and business decisions that need or benefit from advanced heat pump solutions. No manufacturers will be present, as this workshop is intended to sort out priorities and interests of energy efficiency stakeholders. Technical skills not required, though most attendees are working on one or more aspects of heat pump technology and market development. (max = 30 people)

## Why Now

Accelerating market adoption of advanced heat pumps offer enormous potential benefits for utilities and policy makers. The potential source energy savings of air source heat pumps by 2050 is roughly the same as electric vehicles and photovoltaics<sup>1</sup>. Technology shifts are occurring that could redefine residential and small commercial air source heat pumps (gas or electric energy source) and enable greater integration of renewable energy resources. How quickly these technology shifts occur and what data that they provide to customers, program managers, system operators, and their impact to utility load management and efficiency goals is uncertain will be determined by the collective actions that utilities and other market actors take. Event organizers see an opportunity to coordinate actions to influence manufacturers' product development in a way that could simplify the market, provide verified demand and energy savings, and lower total operational costs for end users.

The focus of this Workshop is to improved performance metrics/specifications for ASHPs. Current metrics and associated test procedures do not reliably provide accurate measures of actual ASHP performance, particularly the latest generation of variable capacity ASHPs. This workshop will share the latest lab and field metrics development work, and discuss what is needed to develop improved lab based real world whole building performance metrics. The hope is that these can form the basis of a "roadmap specification"<sup>2</sup> that define performance, data, features, climate-specific best practices, and enable interested parties to communicate this to manufactures and other trade partners with a common voice.

## Desired Outcomes

The goal is to establish a coordinated US/Canadian effort to advance performance, metrics, and data collection that form the basis utility program activities on heat pumps.

- Attendees are familiar with what others are doing and what is possible
- Agreement on what is needed to make a business case for improved metrics and testing
- Draft a "roadmap specification"<sup>2</sup> that defines the key elements desired in an advanced ASHP
- Commitment to collaboration on lab and field testing activities and specification development
- Process for coordinating activity going forward

---

<sup>1</sup> 2019 "Market Transformation Potential of ASHPs", 2018 ACEEE Summer Study, C Dymond, S Nadel, D Lis, R Weber

<sup>2</sup> The term "roadmap specification" describes a multi-tiered, specification that outlines future targets, data, criteria. This is distinguished from a "market specification" like ENERGYSTAR that is a criteria based on current market conditions.

## Workshop Agenda

| Thursday | Activity  |
|----------|---|
| 10:00 AM | Registration/Name Tags  |
| 11:00 AM | Welcome - Christopher Dymond<br>Introductions – Each attendee presents 1 slide about their current ASHP work  |
| 12:00 PM | Lunch & Keynote: “ASHP Future Potential” - Dr. Radermacher<br>Questions   |
| 1:30 PM  | What we Know about performance of ASHPs<br>Dave Lis - Introduction - metrics<br>Mark Modera – Real-world field performance in the Lab<br>Bruce Wilcox – Side by Side Field Testing<br>Christopher Dymond - Recent ASHP studies<br>Bruce Harley - Load based testing results - Purdue, UL, and ATS   |
| 3:30 PM  | Cookies and Coffee<br>Post-it Note Request - what else do we need to know? barriers to address?<br>Invite people to organize post-it notes by category  |
| 4:00 PM  | World Café – 12 years from now, what do we reasonably want from ASHPs<br>1. What do we want/need 5-12 years from now<br>2. what's missing, then highlight most essential components<br>3. create new sheet stating vision - succinct<br>Report Out ---- 5min/table ----- each is part of the vision |
| 5:30 PM  | Western Cooling Efficiency Center – Lab Tour (Optional)   |
| 7:00 PM  | No-host Dinner at Tres Hermanas Davis (Optional)  |

| Friday   | Activity   |
|----------|--|
| 7:30 AM  | Coffee, bagels, and scones   |
| 8:30 AM  | Introduction - recap vision, goals for day, how day is structured<br>Present Strawman Critical Path Challenges Framework   |
| 8:45 AM  | ACTIVITY 1 - Confirm and Refine Strawman (categories from Day 1)<br>group discussion   |
| 9:15 AM  | ACTIVITY 2 - Critical path challenges<br>1. Challenges<br>2. Any other challenges, begin to prioritize<br>3. Priority challenges.  |
| 10:15 AM | BREAK  |
| 10:45 AM | ACTIVITY 3- Detail Tasks of top priorities<br>1. Activities to address priority challenges<br>2. Any other activities, importance, cost, difficulty, order/timing<br>3. Finishing out the prioritization<br>Report-out: important near term activities |
| 12:00 PM | LUNCH  |
| 1:15 PM  | ACTIVITY 4 - Team Forming & Logistics<br>Complete Worksheet<br>Report-out  |
| 2:15 PM  | Closing Discussion   |
| 2:45 PM  | END  |

## Photos of Breakout Notes

My Apologies for the uncoordinated nature of these photos – most of the work was summarized in the activity tables, but there are lots of good ideas in here – I just could not find the time to compile them.

Photo 1

**EQUIPMENT SPEC**

**Equipment Specification Problem Statement:**  
Imperfect, inconsistent specs used by program fail to effectively motivate manufacturer's product development towards low energy/carbon systems.

**Equipment Specification Vision:**  
In \_\_\_\_ years, programs broadly promote consistent spec, driving accelerated adoption of high performing ASHPs.  
*(Low energy/demand for the massive transportation fleet)*

### Activity | Importance | Time | Cost | Difficulty | PRIORITY

|  |  |                          |                   |  |   |
|--|--|--------------------------|-------------------|--|---|
| Define Value Propositions/<br>Users/use cases<br>- Programs<br>- Manufacturers<br>- Contractors<br>= Customers |  | 6 months                 | 3<br><del>2</del> |  | 1 |
| Test Value propositions  |  | 6 months                 | <del>2</del><br>2 |  | 2 |
| Determine Data Reporting Requirements/Requests   |  | 6 months*                | 3                 |  | 2 |
| Determine integrated control strategies  |  | 6 months†                | 3                 |  | 3 |
| Publish/integrate Standards/spec (overall 18 months)   |  | 6 months                 | 3                 |  | 4 |
| Define Performance tiers/features (intermediate services)  |  | 6 months‡                | 3                 |  | 3 |
| Test and adjust Spec/tiers   |  | ongoing                  | 3                 |  | 5 |
| Adopt Adoption of spec   |  | Before After Publication | 3                 |  | 5 |
| TOTAL  |  | 2 yrs                    |                   |  |   |

ANURAG SURI  
 Pragati Mishra  
 Siddhartha Singh  
 Rishabh Kumar  
 Harsh Arora  
 Mark Akshay  
 Anand Mishra  
 Rishi Mishra etc

Photo 2

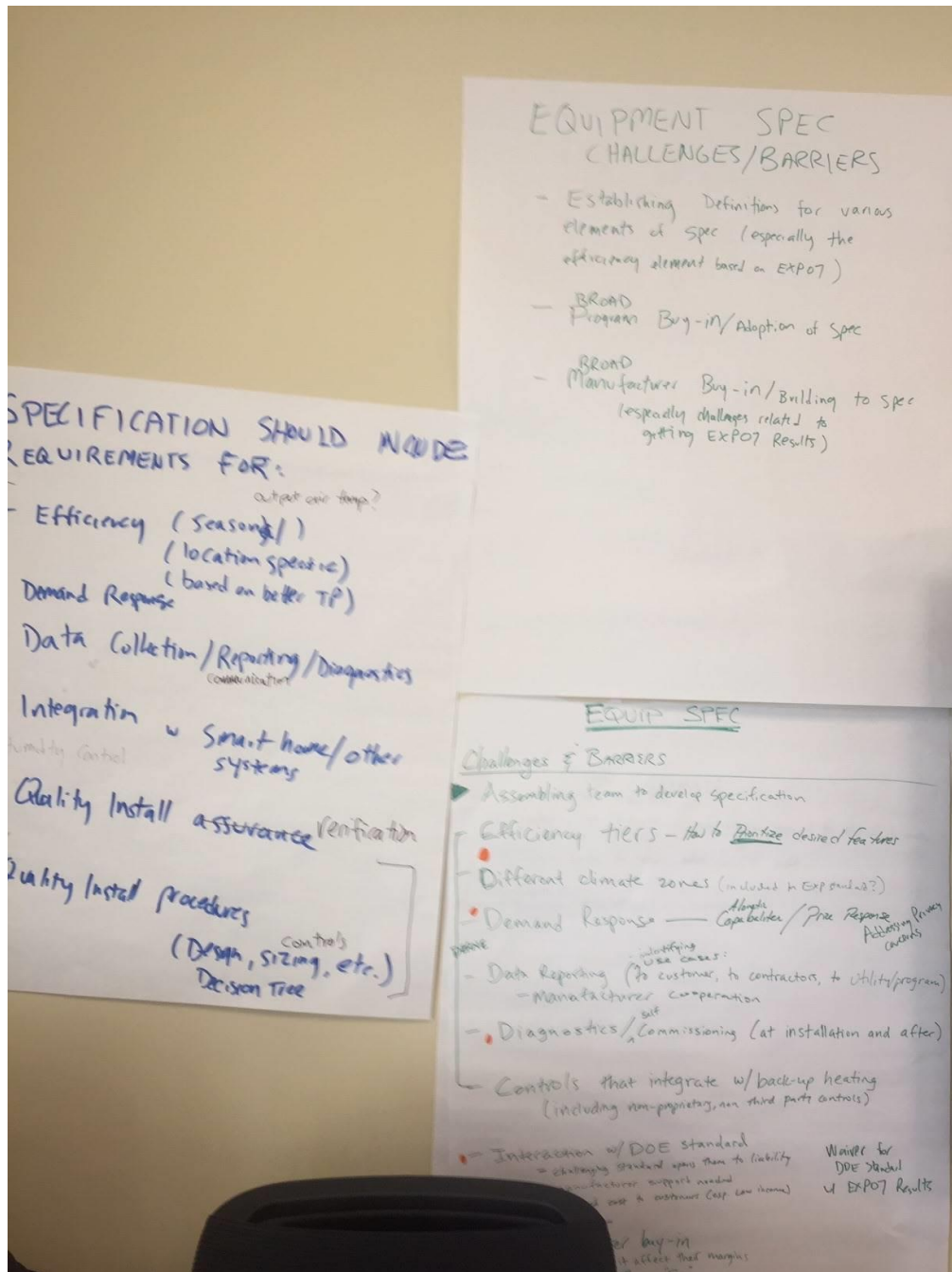


Photo 3

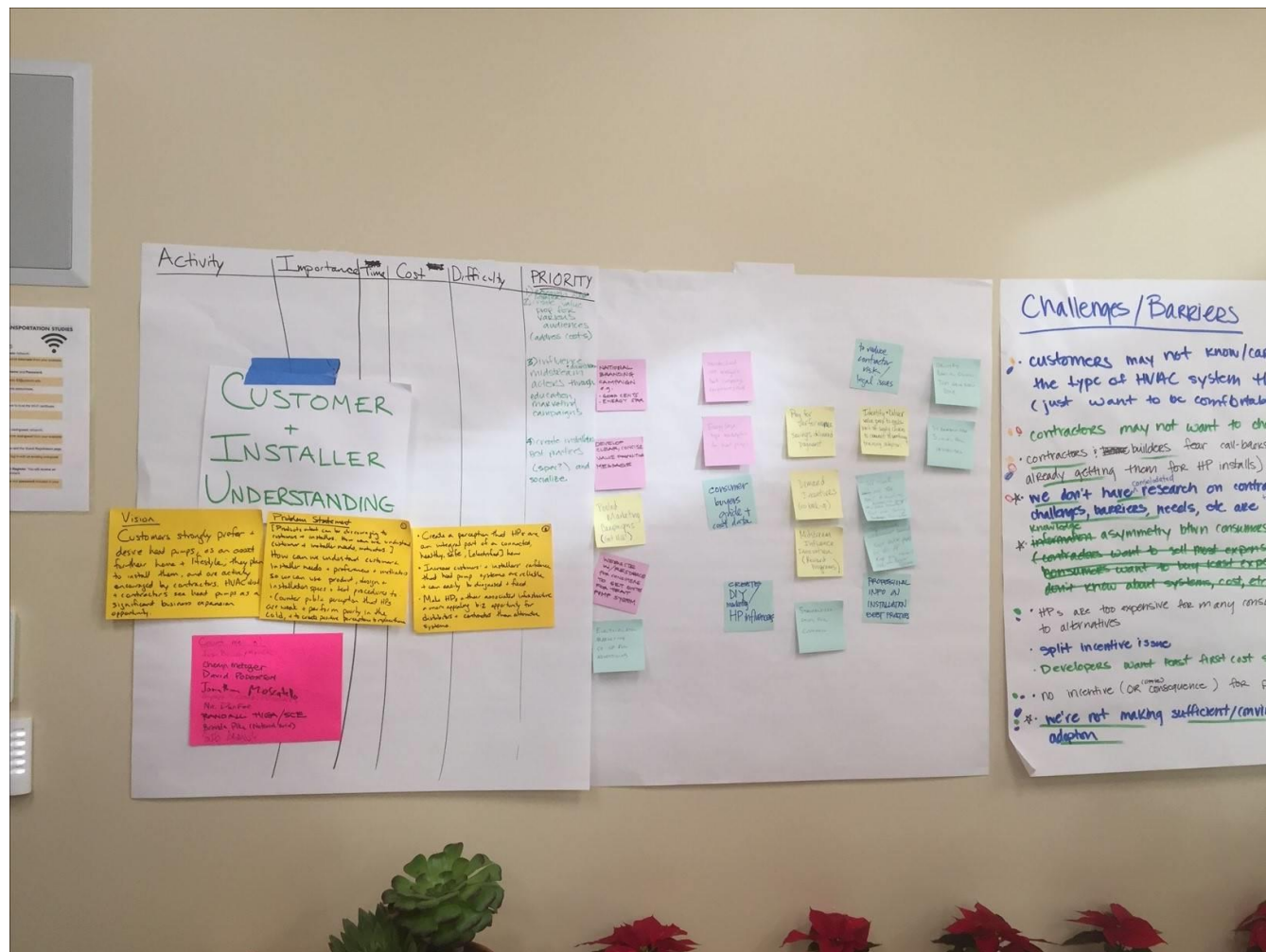




Photo 4

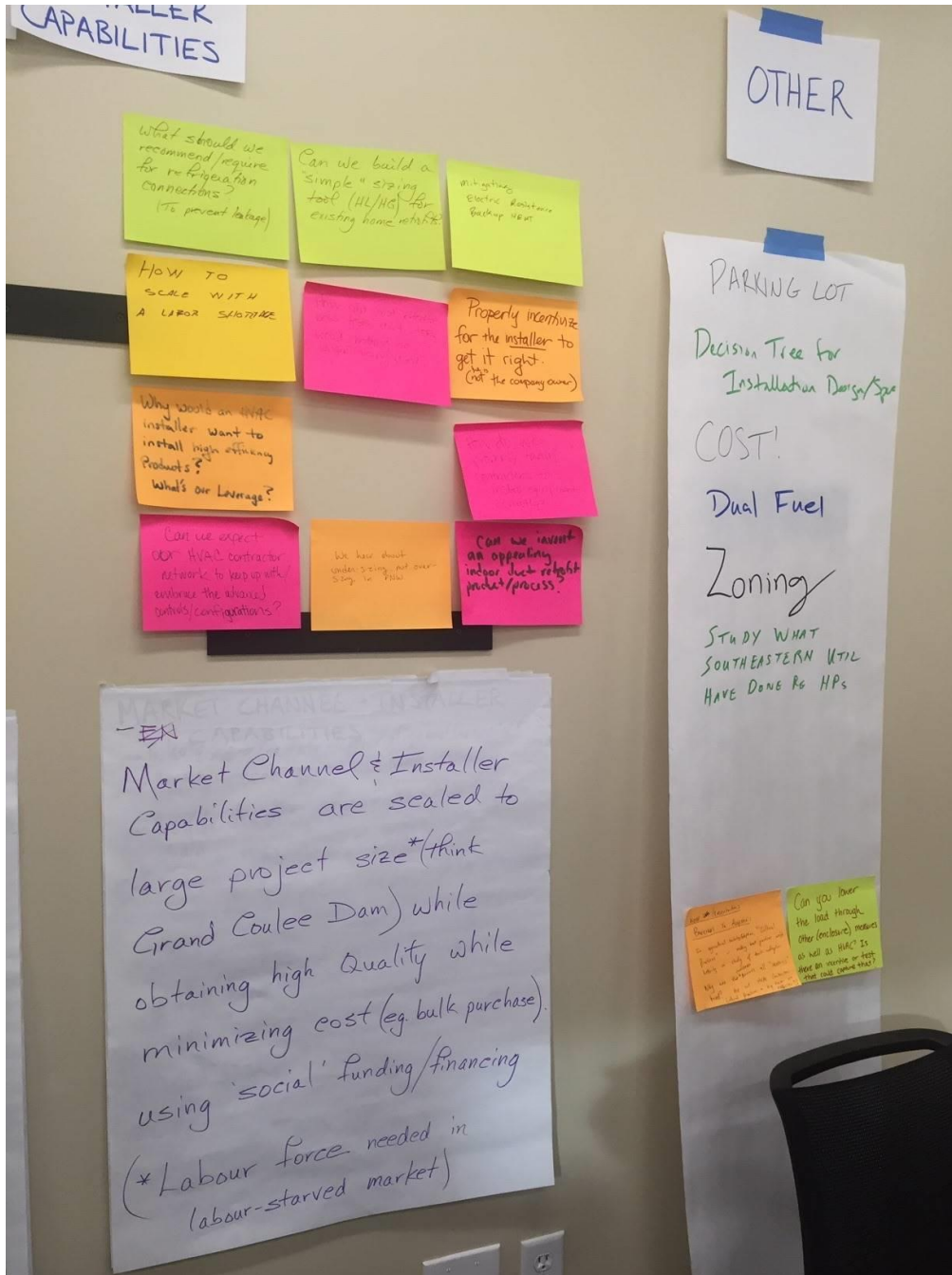


Photo 5

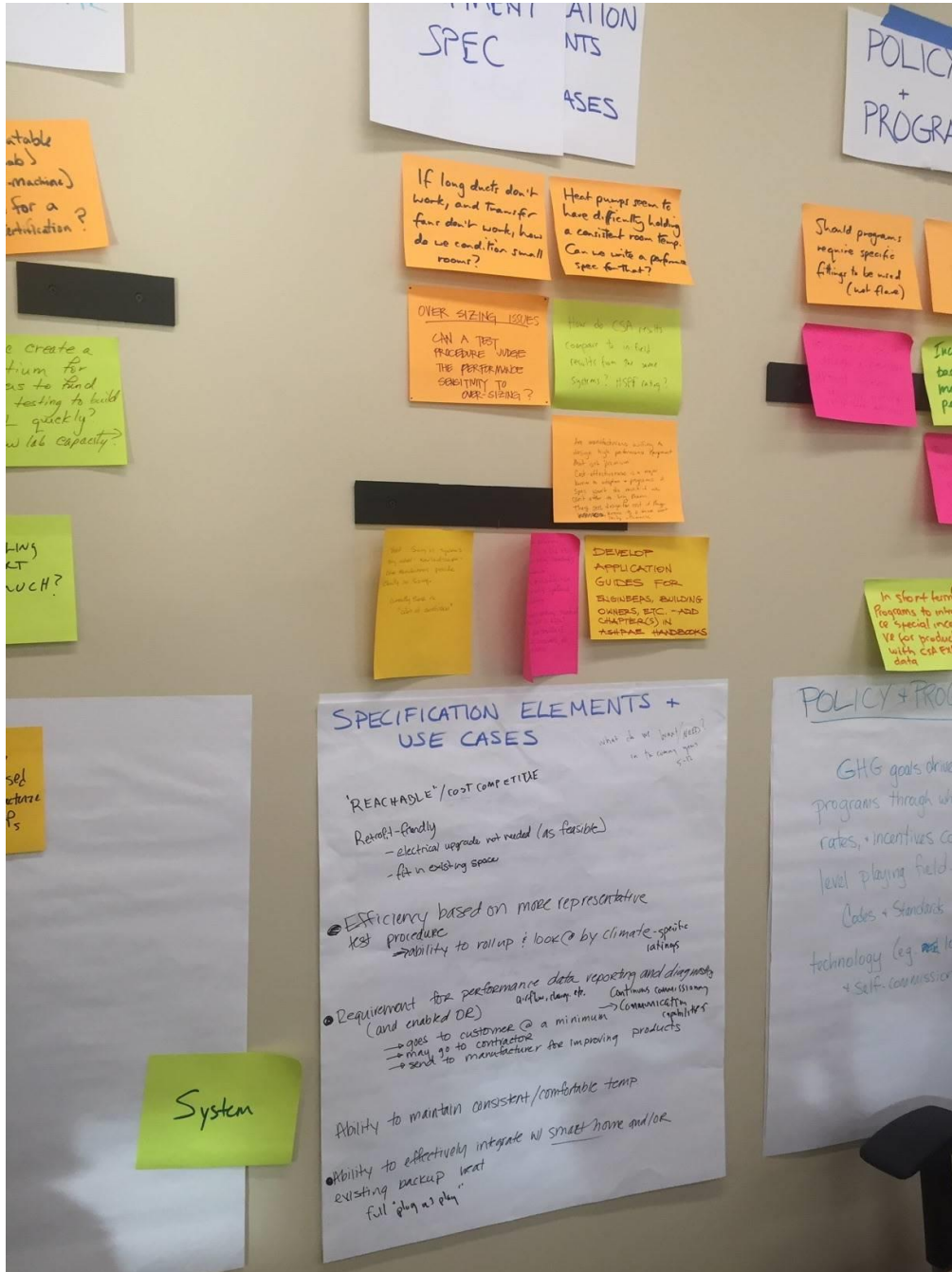
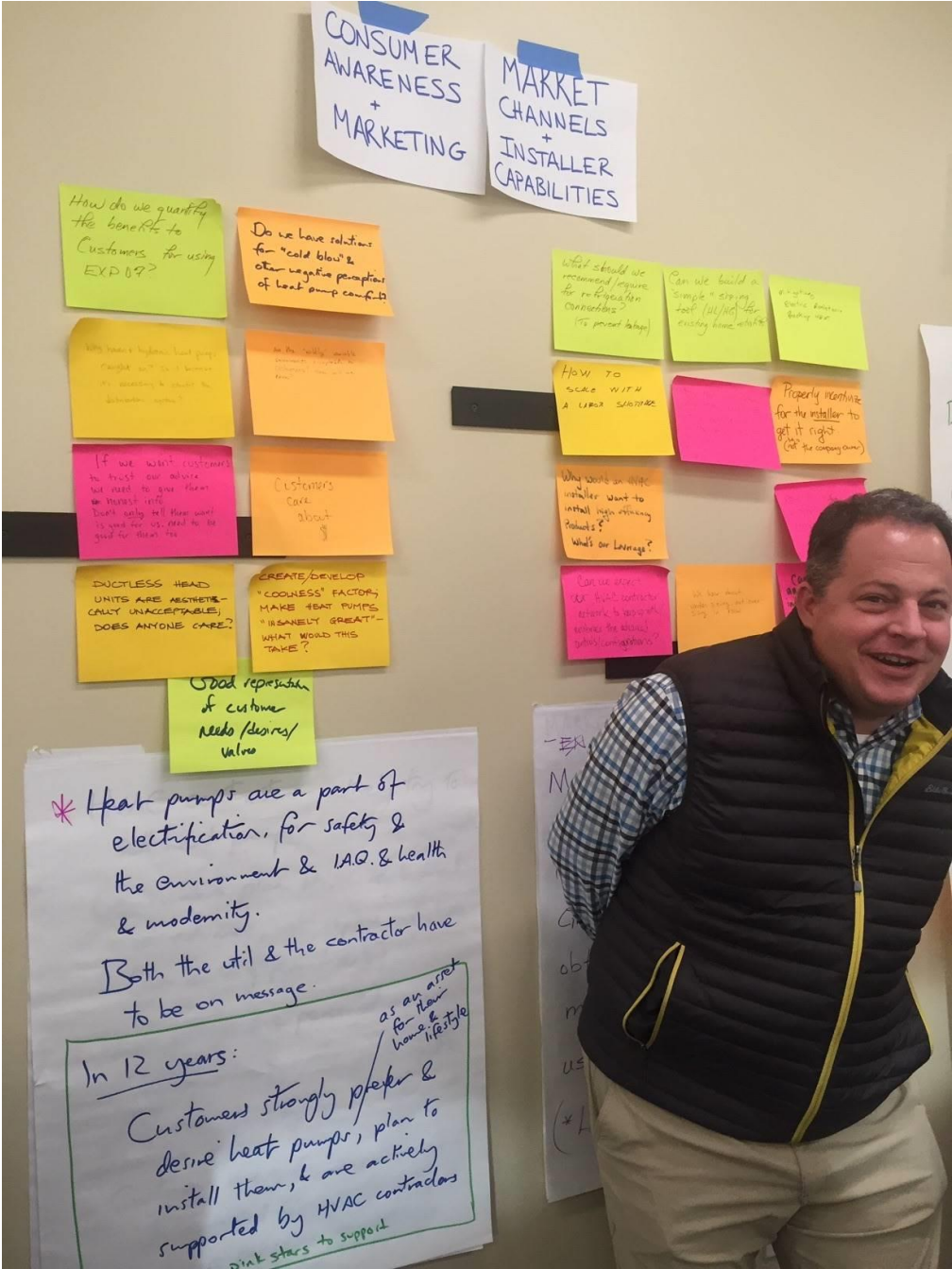


Photo 6 (with Jonathon M)





able  
ab's  
(machine)  
for a  
satiation?

create a  
tium for  
as to find  
testing to build  
quickly?  
w lab capacity?

ING  
ET  
UCH?

sed  
ature  
P's

SYSTEM

MENT  
SPEC  
ATION  
NTS  
ASES

If long ducts don't  
work, and transfer  
fans don't work, how  
do we condition small  
rooms?

Heat pumps seem to  
have difficulty holding  
a consistent room temp.  
Can we write a perform  
spec for that?

Should programs  
require specific  
fitting to be used  
(not flange)

OVER SIZING ISSUES  
CAN A TEST  
PROCEDURE INCREASE  
THE PERFORMANCE  
SENSITIVITY TO  
OVER SIZING?

How do CSA tests  
(compare to in fact)  
translate from the same  
system? HSEF rating?

In short term  
Programs to inte  
ce special me  
ve for product  
with cost per  
data

DEVELOP  
APPLICATION  
GUIDES FOR  
BUILDERS, BUILDING  
OWNERS, ETC. - ADD  
CHAPTERS IN  
ASTM HANDBOOKS

SPECIFICATION ELEMENTS +  
USE CASES

'REACHABLE' / COST COMPETITIVE  
Retrofit - Reretrofit  
- electrical upgrade not needed (as feasible)  
- fit in existing space

Efficiency based on more representative  
test procedure  
- ability to roll up & back by climate-specific  
ratings

Requirement for performance data reporting and diagnostics  
(and enabled DR)  
- goes to customer @ a minimum  
- may go to contractor  
- send to manufacturer for improving products

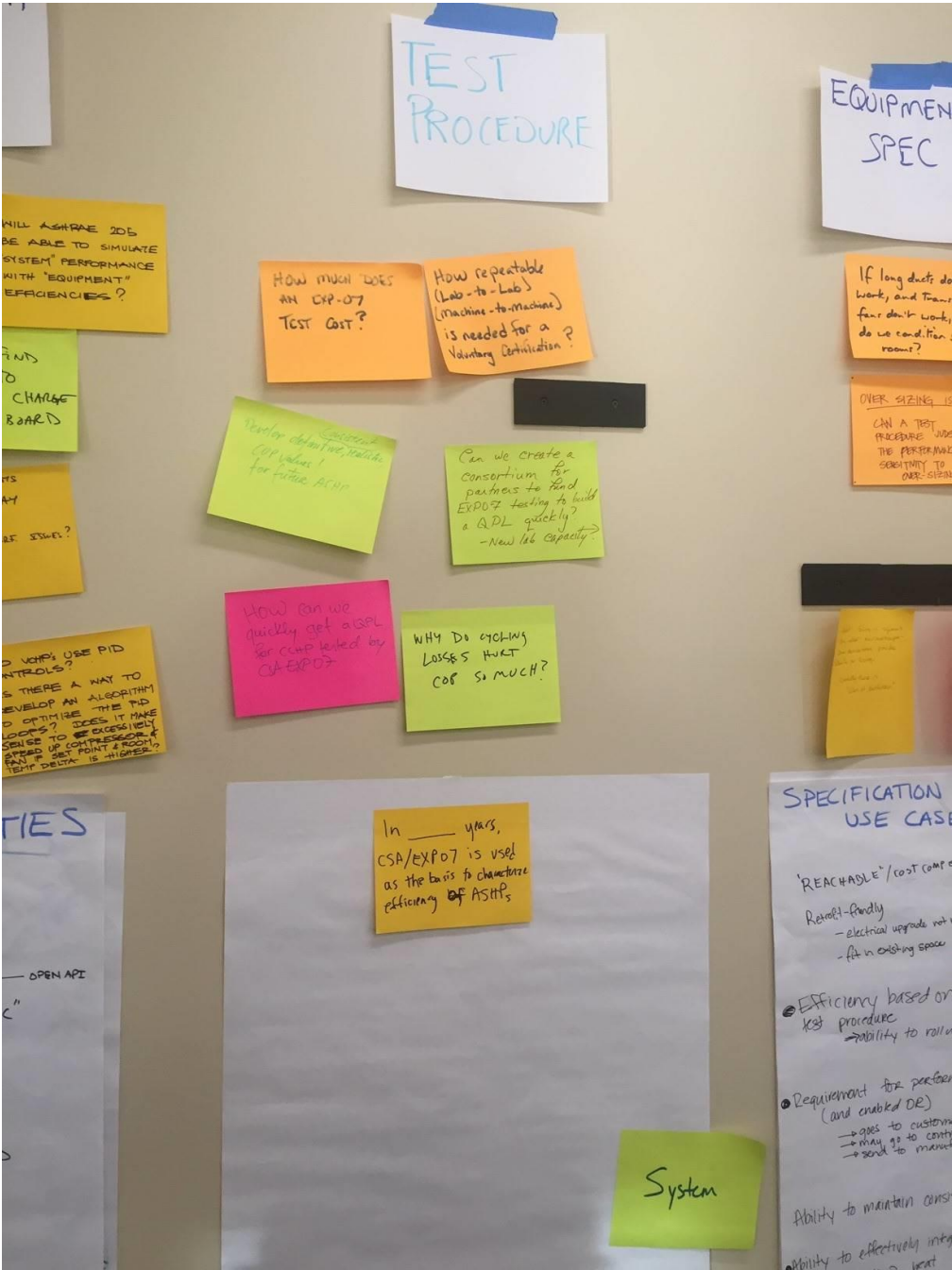
Ability to maintain consistent/comfortable temp

Ability to effectively integrate w/ smart home and/or  
existing backup heat  
full "plug and play"

POLICY + PROGRAM

GHG goals drive  
programs through wh  
rates, incentives co  
level playing field  
Codes + Standards  
technology (eg net le  
+ self-commissioning

Photo 8



[illegible]

## PRODUCT CAPABILITIES

## TOP CAPABILITIES

- LOW COST SHOWS UP @ SCALE

- uct list for efficiency programs
- zap, delivered air temp
- PG on car shown instructions/usually
- sizing
- homes, sizing properly to load
- agrees to release to utility
- total, up to minute data, open API
- capacity, PG, thermostat operation
- bels, installation costs
- t (eg. savings), hard (eg. temp)
- costing)
- to consumers
- Manufacturers/product lists

Photo 10

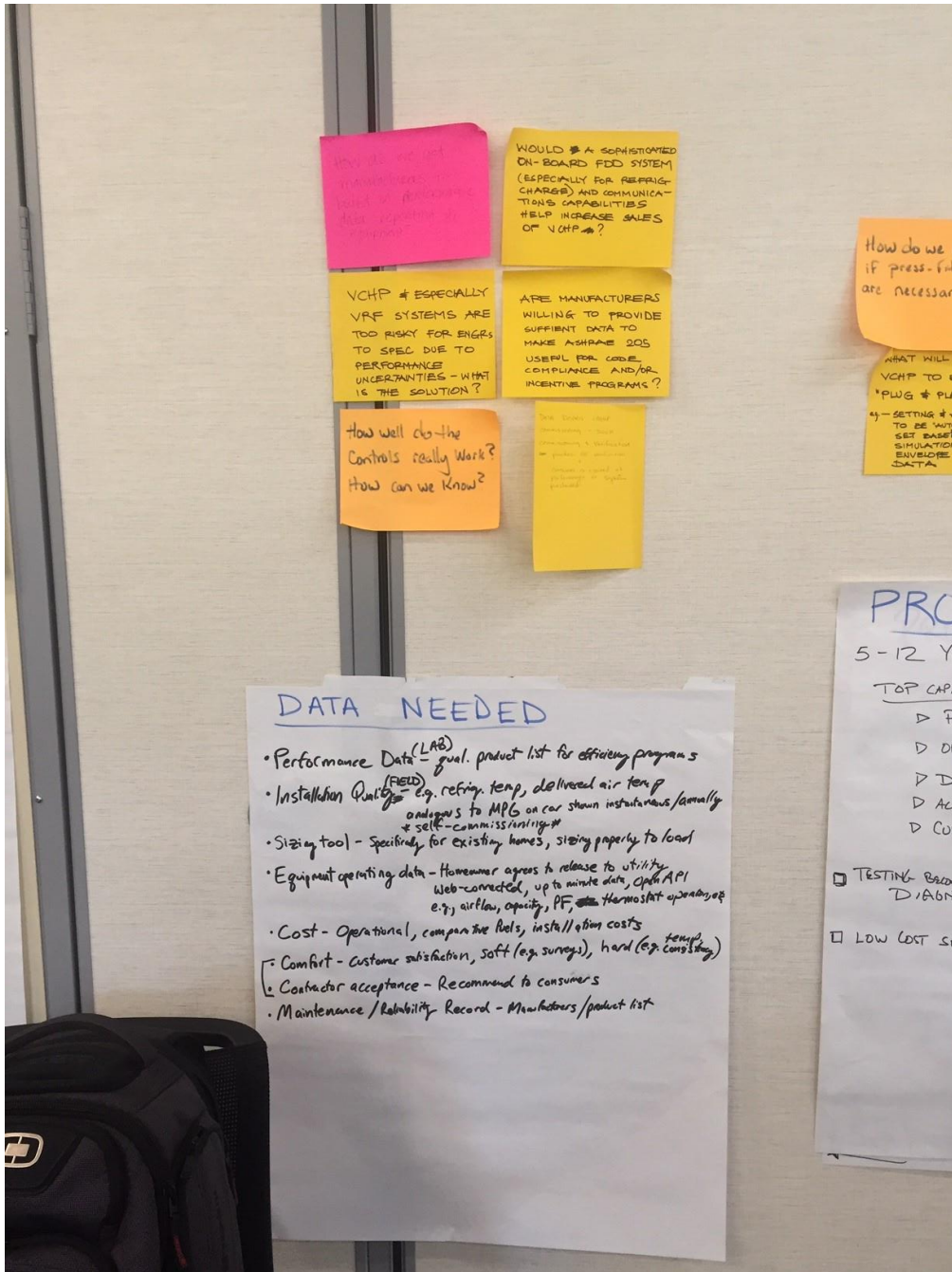




Photo 11

