



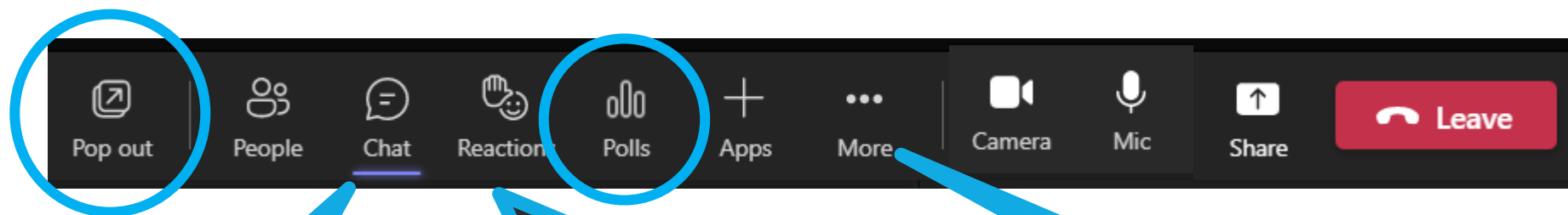
# Regional Portfolio Advisory Committee

**Q3 2023: August 29**  
10:00am – 3:00pm Pacific  
*Virtual only*





# Tools for Today: Engaging on Teams

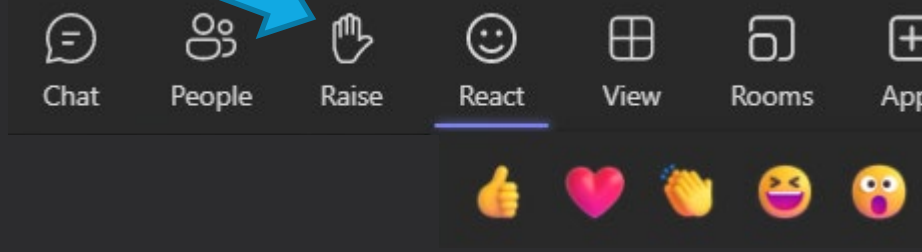


The chat is not captured in the recording.

Do you have any accessibility challenges with this technology today?

## Comments/Questions?

Please raise your virtual hand or chime in  
Chat & reactions also welcome



“...” More includes:

- ✓ Settings: mic & video
- ✓ Background effects

*Heads up:*  
*“Spotlighting” Speakers*





# *Introductions*

- Name
- Organization
- *And...*

**XXX**







# Agenda

*All times Pacific*

10:00-10:20	Welcome, Introductions and Agenda	
10:20-10:35	Housekeeping and Looking Ahead	
10:35-11:35	Market Transformation Refresher (continued from Q2)	
55 min	LUNCH	
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2:50-3:00	Public Comment, meeting debrief and adjourn	

# Packet Review & Informational Updates



- Tier 1: Agenda Focus Items

- ✓ *Market Transformation Overview (pg. 3)*
- ✓ *RPAC Voting Process Refresher (pg. 4)*
- ✓ *Advanced Heat Pumps Milestone Doc (pg. 5)*
- ✓ *Update on Active Work Groups (pg. 21)*

- Tier 2: Informational Updates

- ✓ *HPWH Consumer Consideration Campaign Update (pg. 23)*
- ✓ *Manufactured Homes Update (pg. 24)*
- ✓ *Q2/Q3 Committee Updates (pg. 25)*

- Tier 3: Additional Resources *(links on pg. 2)*

*Market Progress Report, committee materials (charters & recent meeting resources, functional newsletters (MRE, Emerg Tech, Codes, Standards, NC*





# » *Housekeeping and Looking Ahead*

- ✓ **Update: NEEA Business Planning**
- ✓ **Update: NEEA Operations Planning**
- ✓ **Update: HPWH Marketing Campaign**
- ✓ **Leadership in EE Awards**
- ✓ **Upcoming Meetings**





## ➤ ***Public Outreach on 2025-2029 Plans***

- Plans posted to *neea.org/plans*
- Public comment period from late June – early August
- Strong participation in regional webinars and presentations
- Feedback review at September Board workshop
- Final plans for vote at December Board Meeting





# 2024 Operations Plan Timeline



**Oct. 12:** Full draft plan sent to Board, RPAC & NGAC

**Oct. 12 – Nov 1:** Feedback period for Board and committee members

**December 5:** Board vote on final 2024 Operations Plan





# Proposed HPWH Consideration Campaign

- Context
  - 2023 program focus on distributors and installers
  - Ensure consumers are also moving along in their journey
  - Consumer awareness of HPWHs has grown significantly and it is expected to continue to grow across the Northwest—need to ensure they're moving to consideration
- Recommendation
  - Run a small-scale consideration campaign in 2024, with the purpose of moving consumers from awareness to consideration
- Next Steps
  - October 26: Present proposed campaign @ Operations Plan webinar (RPAC+ portion)
  - November: Provide feedback and comments
  - Q1 2024: Participate in RPAC+ vote
  - Q2 2024: Proposed campaign runs

Update  
to  
timing!





NEEA will recognize individuals and teams for their exemplary dedication and performance in energy efficiency during lunch on the first day of the NEEA Annual Board Meeting on December 4. We are asking for nominations in the following categories:

**Rising Star**  
**Innovative Collaboration**  
**Lifetime Achievement**

Aug 14  
Through  
Sept 15

Nominations open  
now through Sept 15

Dec 04

Event Date

To nominate go to:  
**[neea.org/leadershipawards](http://neea.org/leadershipawards)**



# Upcoming NEEA Meetings

## September

- **September 12<sup>th</sup> – Q3 Board Meeting** ★
- September 21<sup>st</sup> – Regional Emerging Technology Advisory Committee

## October

- **October 26<sup>th</sup> – 2024 Draft Operations Plan Webinar** ★

## November

- November 1<sup>st</sup> – Cost Effectiveness and Evaluation Advisory Committee
- **November 2<sup>nd</sup> – Regional Portfolio Advisory Committee** ★
- November 6<sup>th</sup> & 7<sup>th</sup> – Integrated Systems Coordinating Committee
- November 15<sup>th</sup> & 16<sup>th</sup> – Products Coordinating Committee

## December

- December 4<sup>th</sup> – Leadership in Energy Efficiency Awards
- December 5<sup>th</sup> – Q4 Board Meeting
- December 14<sup>th</sup> – Regional Emerging Technology Advisory Committee





## ***\*Draft\*** 2024 RPAC Meeting Dates*

Q1

Monday

Feb 19

Q2

Thursday

May 16\*

Q3

Thursday

Aug 22

Q4

Tuesday

Nov 5

\*Efficiency Exchange

May 14-15 in Idaho

Alternate option Mon, May 20

Which would you prefer?



# ***Other Upcoming Events or Announcements?***



# Agenda

*All times Pacific*

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# Market Transformation 101

Accelerating Energy Efficiency  
with the Power of Markets

RPAC Q3 2023 Meeting

Jeff Harris  
Northwest Energy  
Efficiency Alliance







NEEA is  
**AN ALLIANCE**  
of utilities and  
energy efficiency  
organizations



# MT 101

## AGENDA

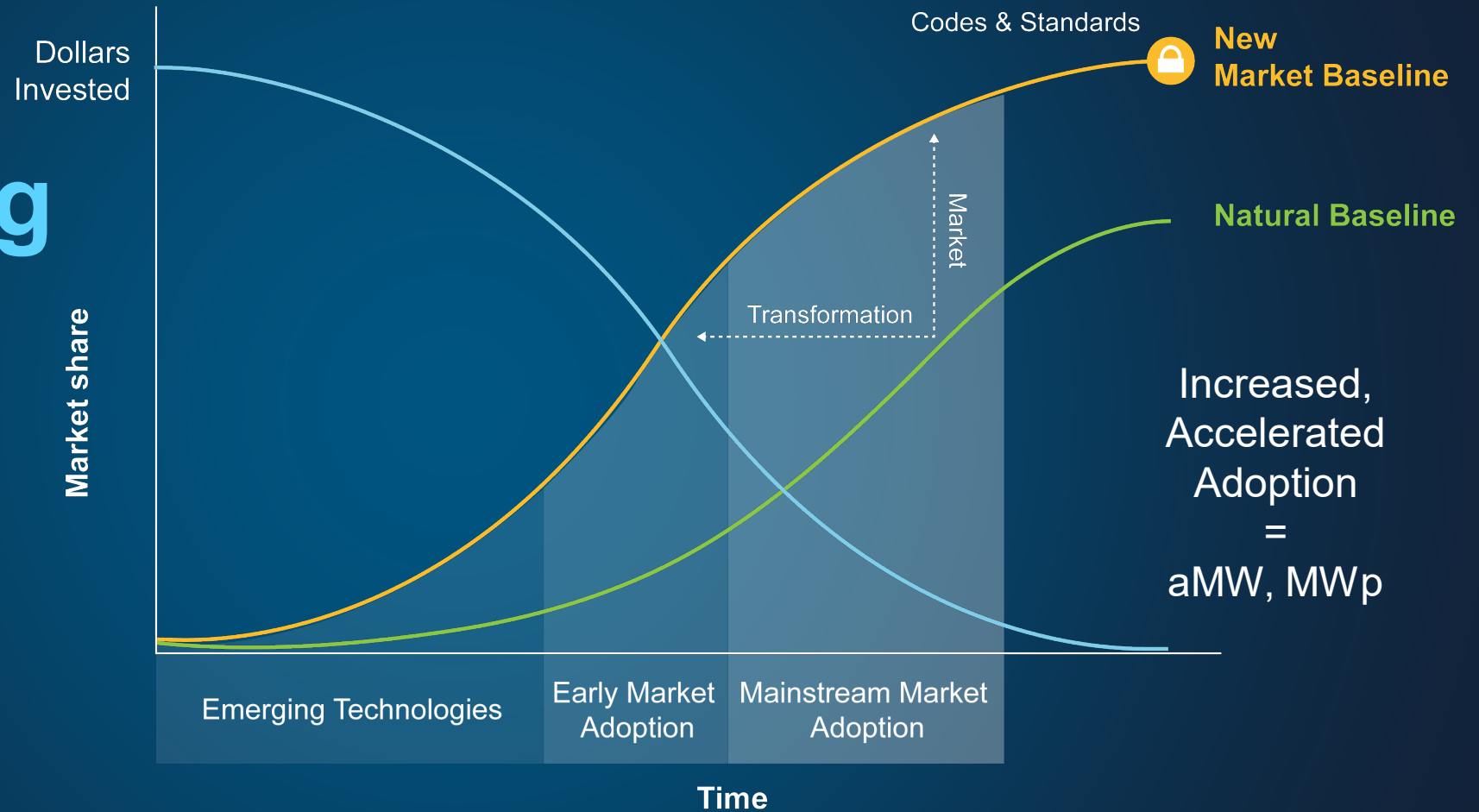
Why do it?

What is it?

How do you do it?

- Understanding markets
- Identifying barriers and opportunities
- Exploiting leverage points
- Deploying successful strategies
- Measuring progress, applying feedback
- Tools of the trade

# Market Transformation: Accelerating Adoption of Energy Efficiency Innovation



What is it (long definition)?:

## MARKET TRANSFORMATION

“The strategic process of intervening in the market to create lasting change **by** removing identified barriers and/or exploiting opportunities to accelerate the adoption of all cost-effective energy efficiency as a matter of standard practice.”



# How do you do it?

## Steps for MARKET TRANSFORMATION: Implementation



**Step Zero:**  
Develop Market  
Characterization &  
Baseline



**Step One:**  
Identify Barriers  
and Opportunities



**Step Two:**  
Develop  
Interventions &  
Metrics



**Step Three:**  
Intervene and  
Manage adaptively

# Step 0: Market Characterization

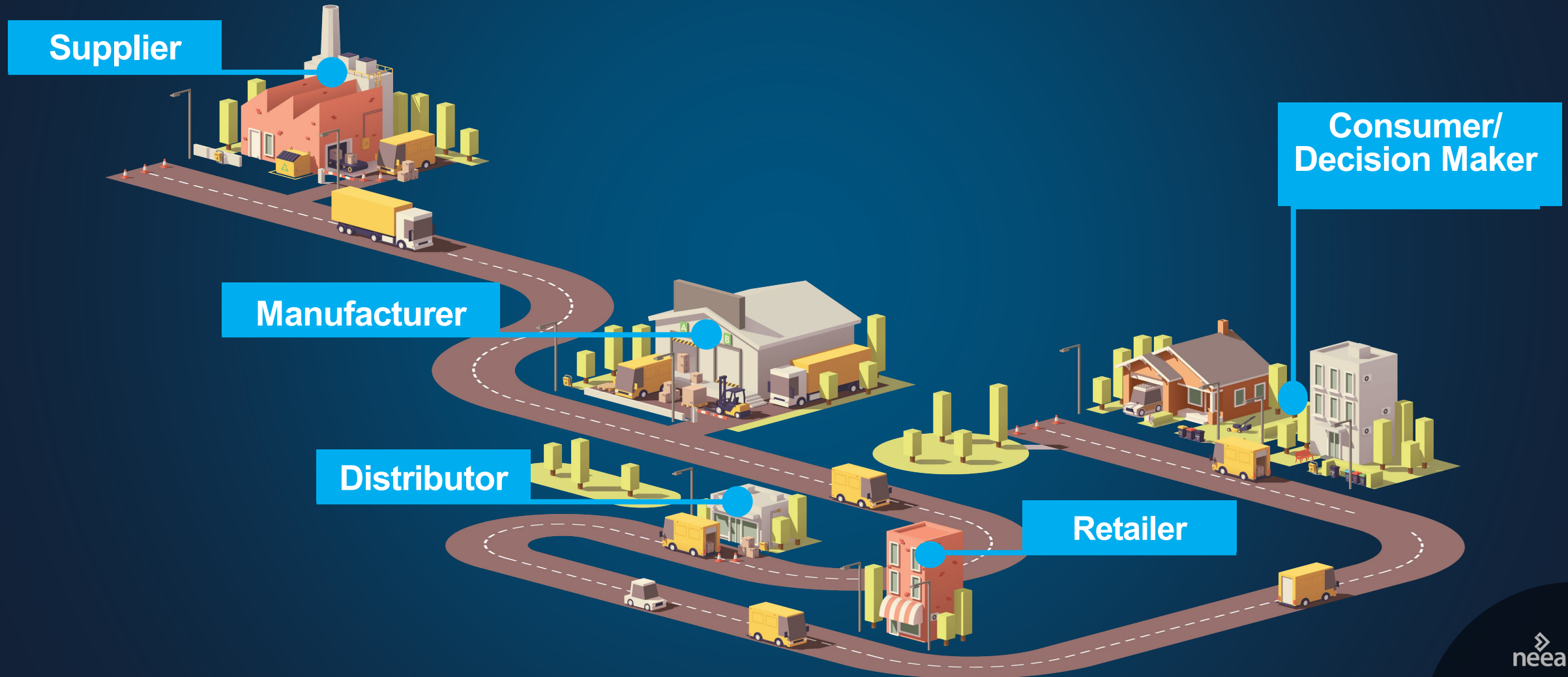
...Let's talk about MARKETS



In mainstream economics, the concept of a market is any structure that allows buyers and sellers to exchange any type of goods, services and information. [Wikipedia]

# Step 0: Market Characterization

## Buyers, Sellers, Supply and Demand



# Step One (Part 1): Identify Barriers and Opportunities



Lack of Awareness/  
Information



Lack of Knowledge/  
Capability



Lack of Availability



Product Features/  
Quality



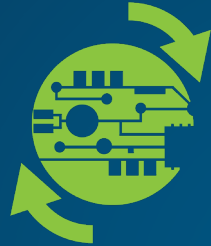
High First Cost



# Step One (Part 2): Identify Barriers and Opportunities



Consumer Preferences



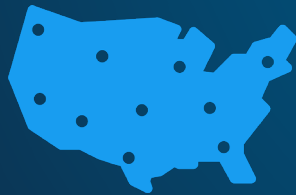
Technology Changes



State and Federal  
Legislation



Codes & Standards  
Spec Revisions



National  
Market Changes



Regional/National  
Supply-Side Market Actors



Economic Changes

# Step Two, Part 1: Develop Strategies for Intervention



Provide credible  
information



Build market capability,  
knowledge and experience



Redefine the value  
proposition



Align EE product  
with Consumer Needs

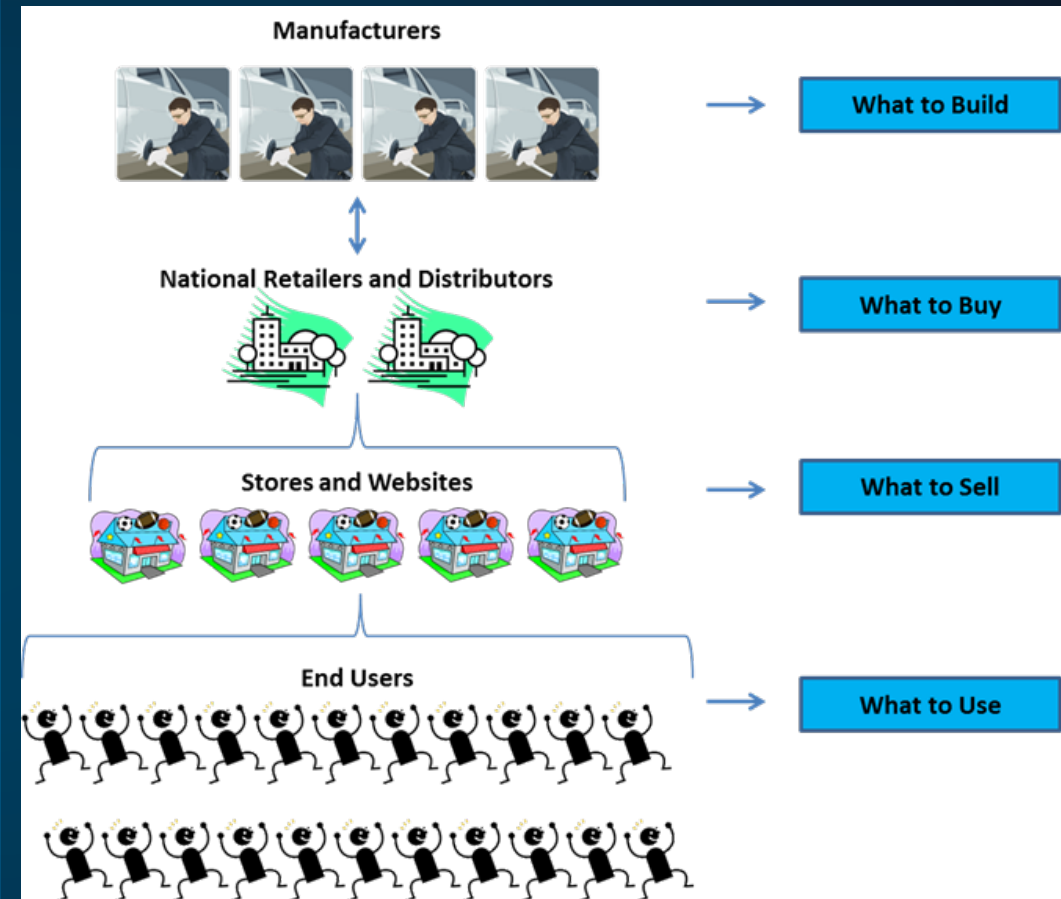


Influence energy codes  
and standards

## Step Two, Part 2: Define Key Metrics & Market Progress Indicators



# Step Two, Part 3: Looking for leverage and right role for NEEA





# Step 3: MARKET INTERVENTION An Adaptive Process



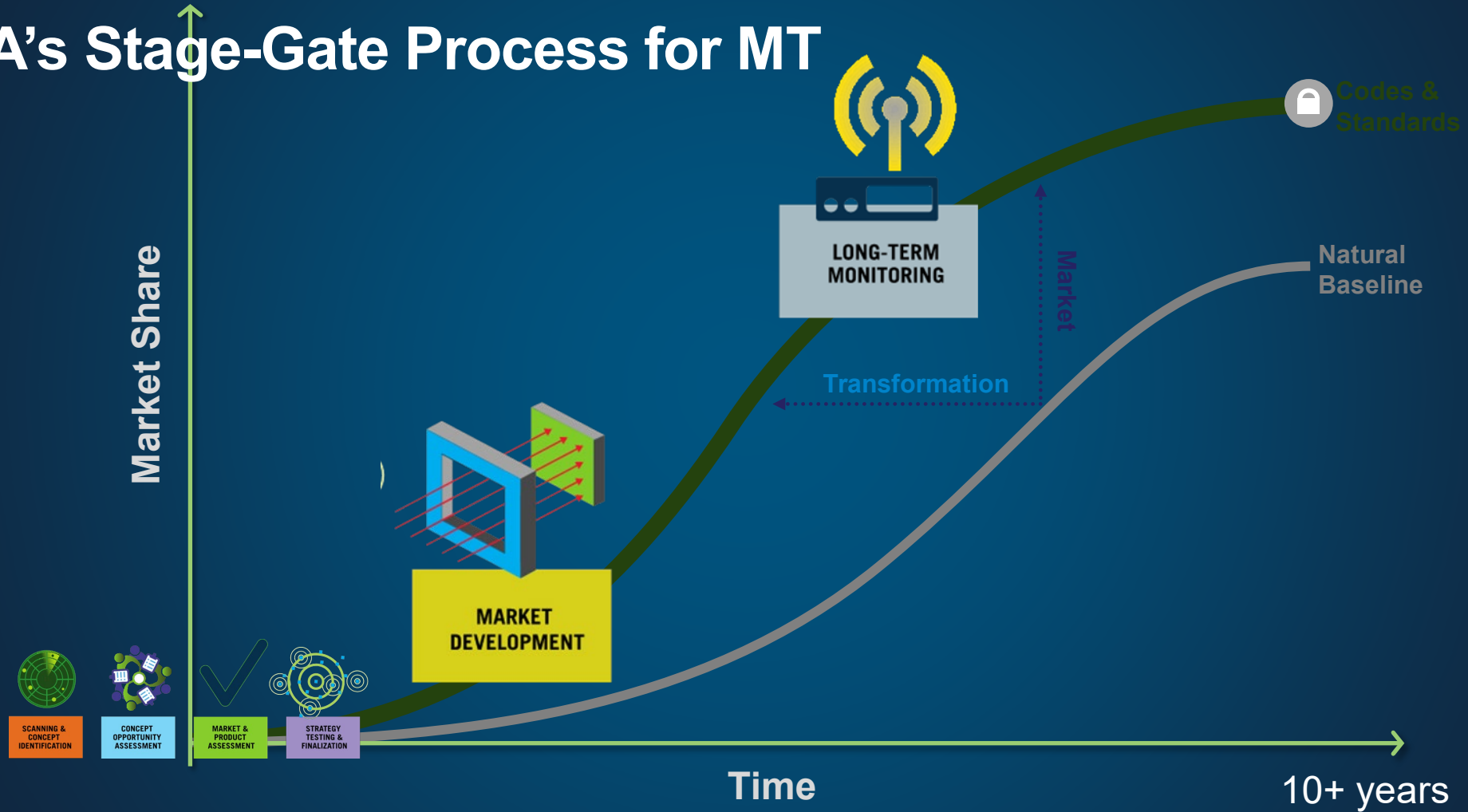
# Step 3: IMPLEMENTATION

## NEEA's Stage-Gate Process for MT



# Step 3: MARKET INTERVENTION

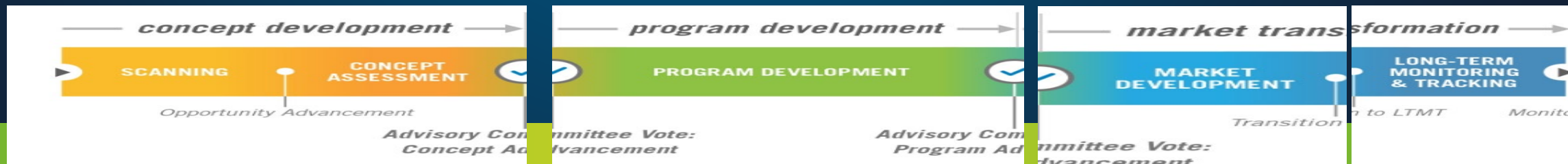
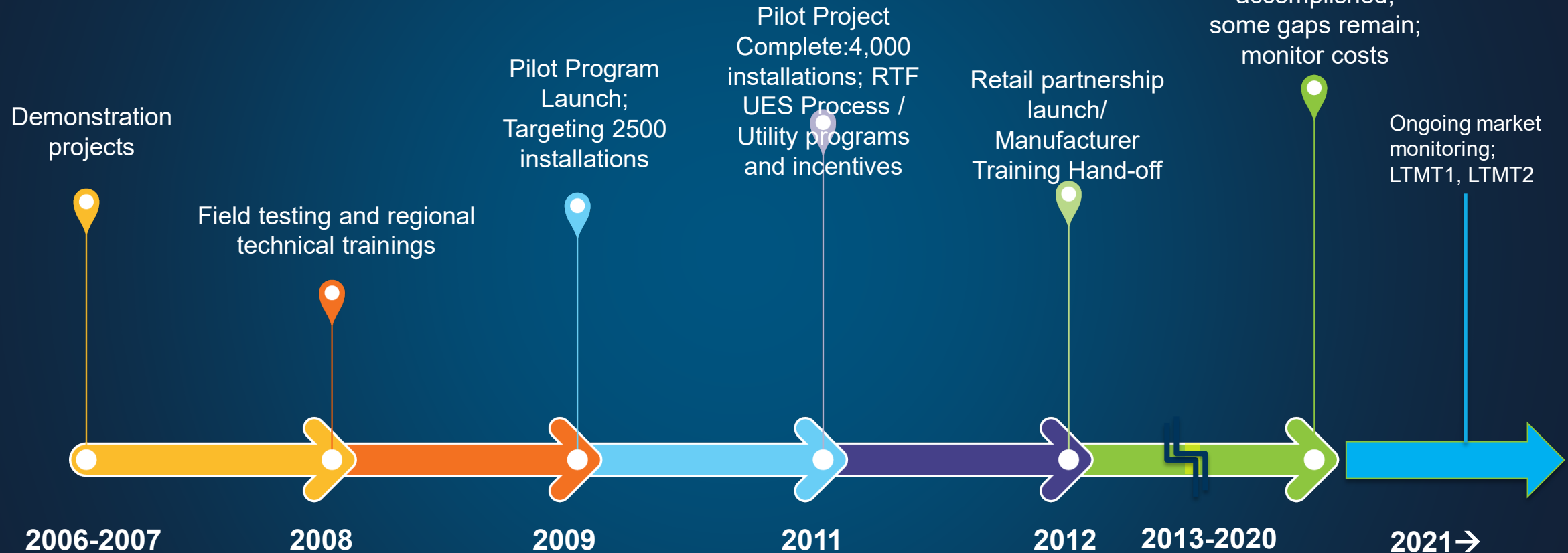
## NEEA's Stage-Gate Process for MT



# Ductless Heat Pumps

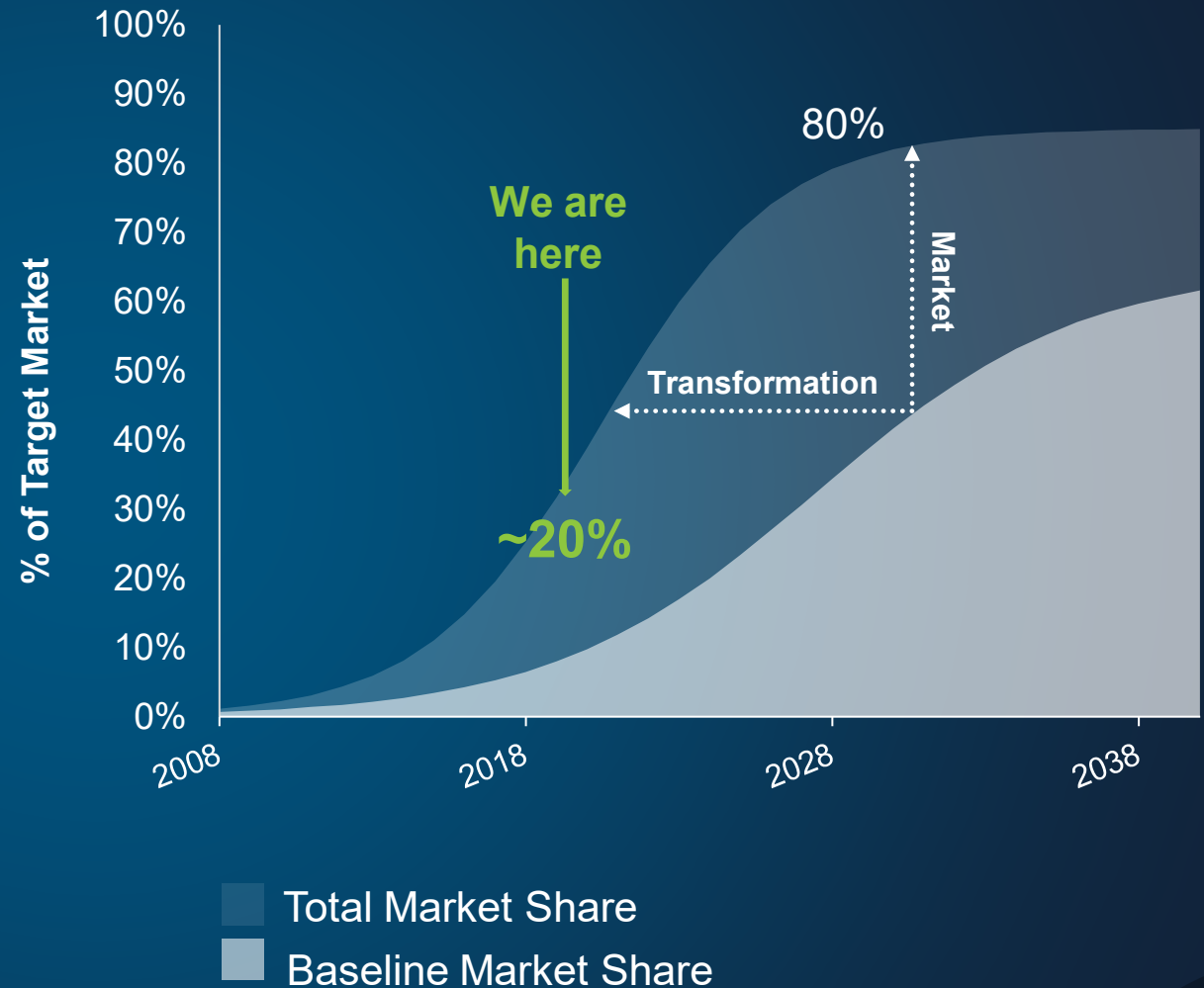
## MT in Action

MPER8 Findings:  
DHP market  
barriers largely  
overcome; sales  
increasing; NEEA  
objectives  
accomplished;  
some gaps remain;  
monitor costs



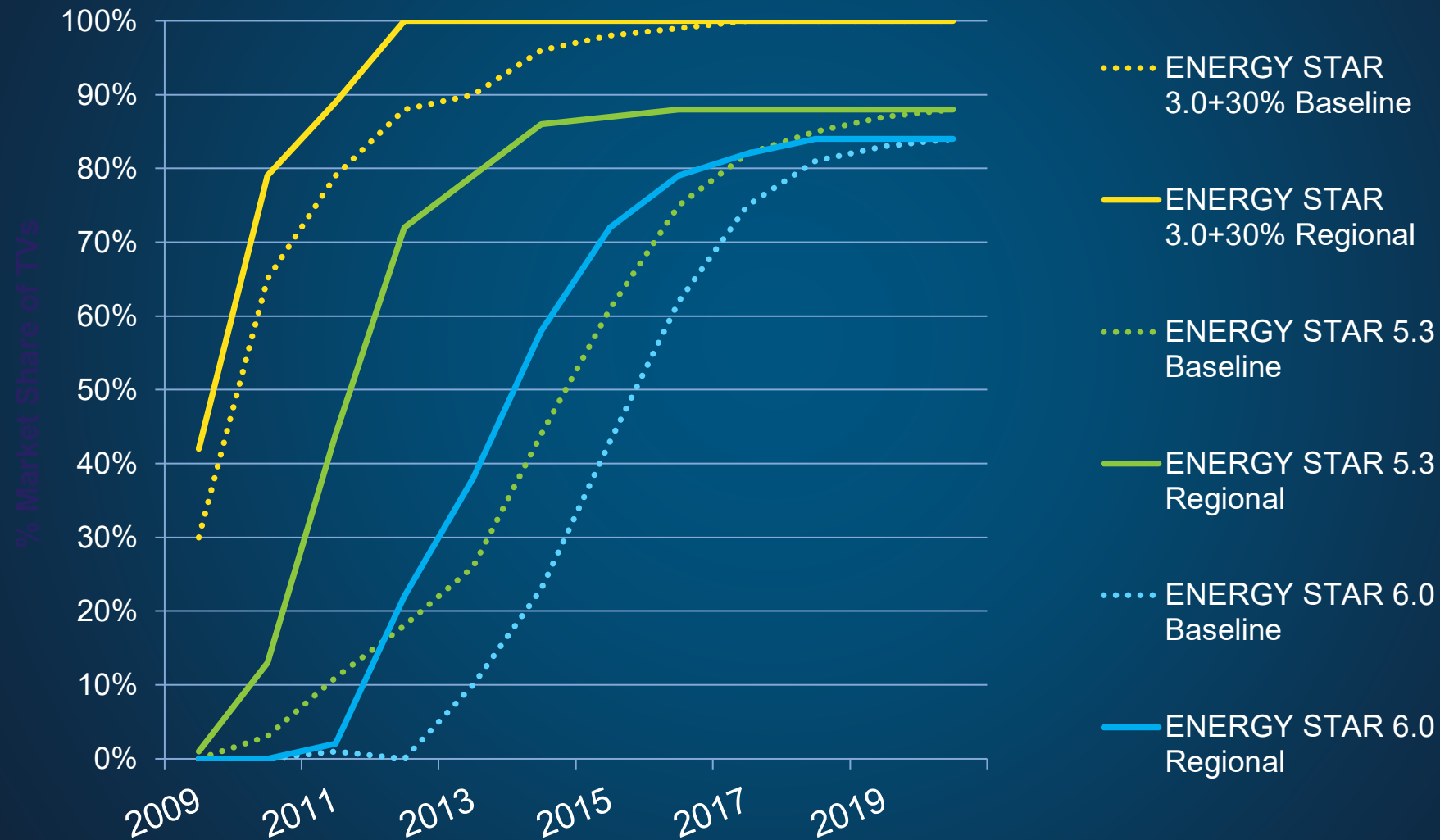


# Ductless Heat Pumps Market Progress in Baseboard/Electric furnace-heated single- family homes



***LTMT2: ~ 3 out of 4 DHPs sold in NW are installed in other market segments***

# Market Transformation in Action: High-definition televisions; a fast-moving market





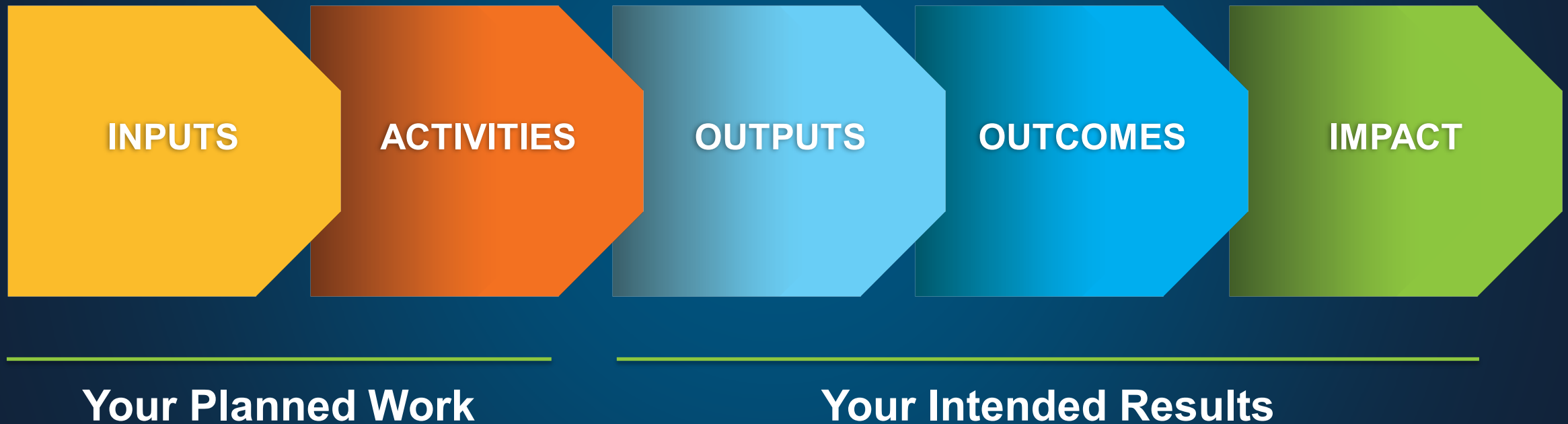
# Questions?

# Additional Material

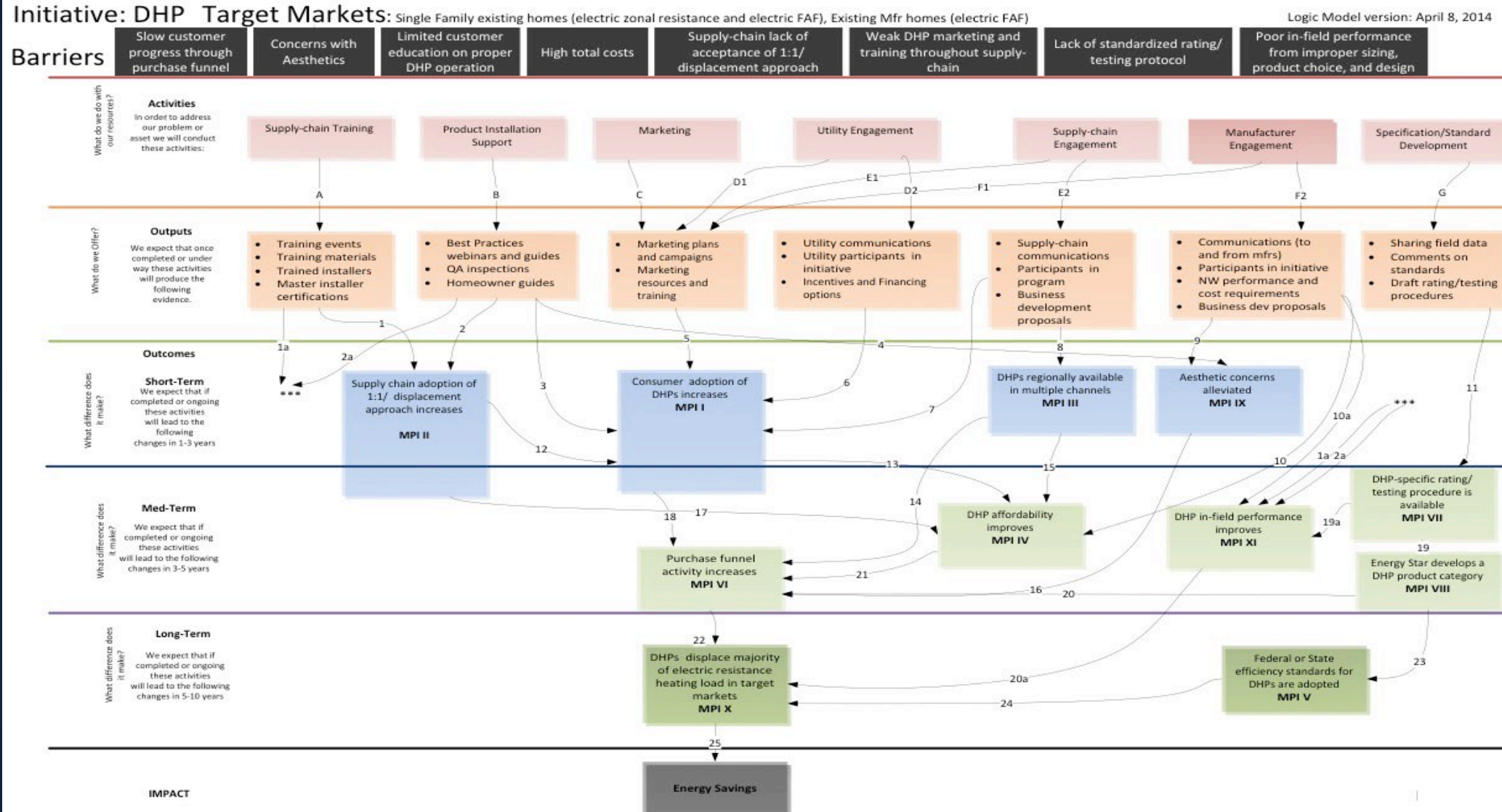


# Tools of the Trade:

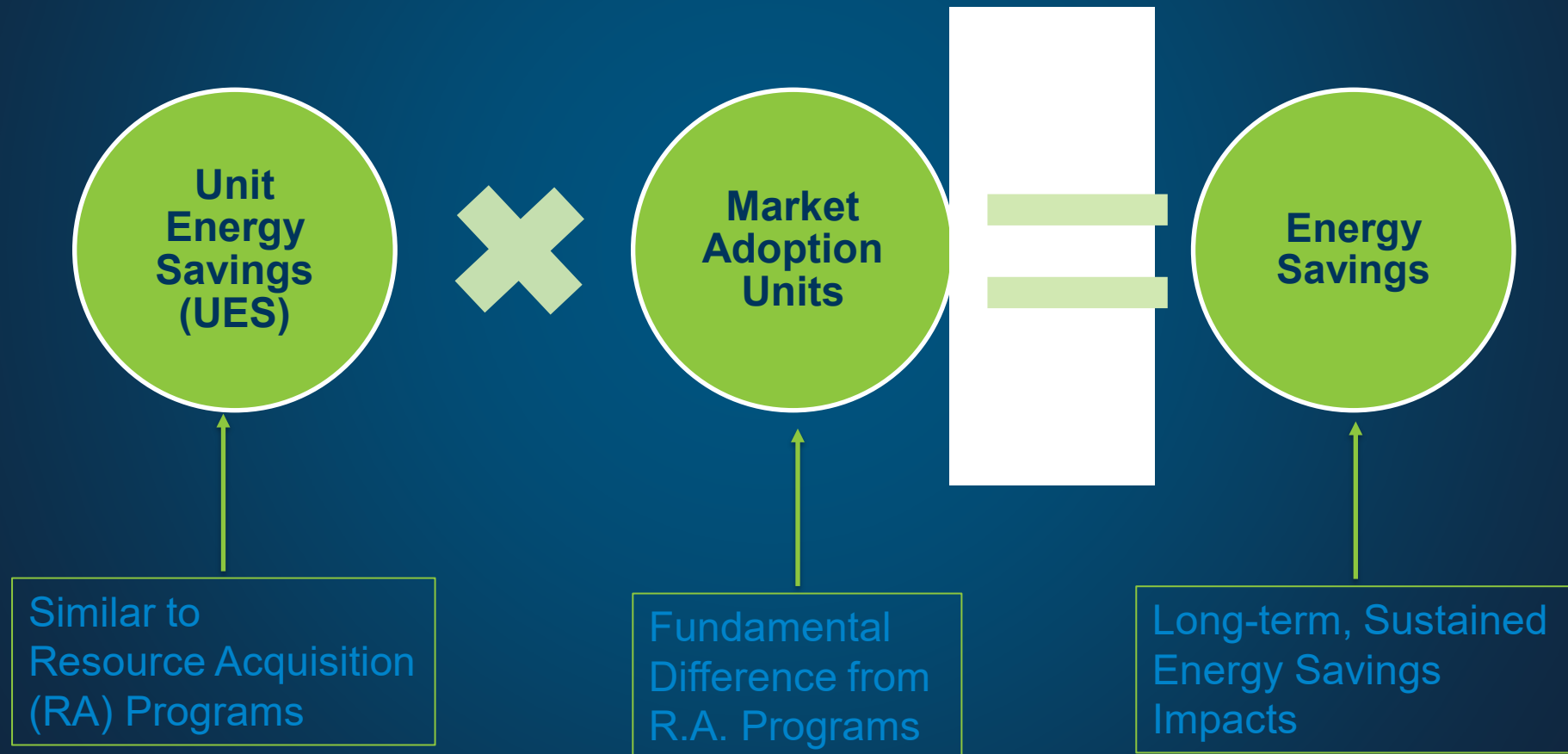
Documenting the MT program theory and defining metrics:  
Logic Models and Market Progress Indicators



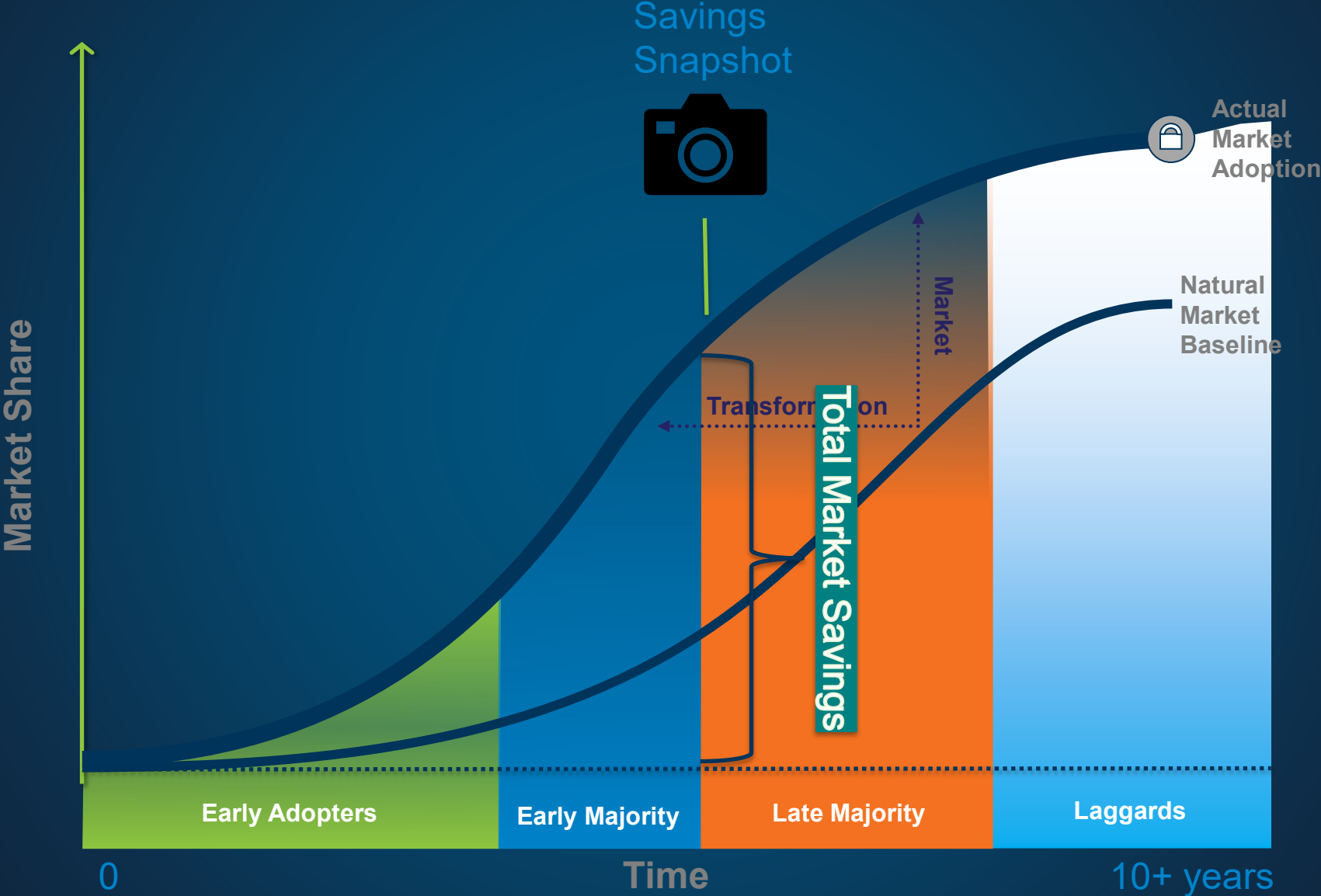
# NEEA Logic Model – Ductless Heat Pumps



# Energy Savings Simplified: Calculation Components



# Total Market Savings



# MT Initiative Life Cycle Documentation

Wraps a business plan around the MT Logic Model





» Thank you!

Jeff Harris, Chief Transformation Officer  
Jharris@neea.org





# Agenda

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# ➤ **LUNCH!**

*Please return by 12:30  
Pacific*





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# Vote Refresher

---

***Alisyn Maggiora***  
***Sr. Stakeholder Relations Manager***







# *RPAC Vote:* *‘Program Advancement’ Milestone*

## *Advanced Heat Pumps*

Name	Organization	Yes	No	Abstain	Present, Not Voting	Not Present
RPAC Voting Members						
Dan Adams	Avista					
Phillip Kelsven	BPA					
Jim White	Chelan County PUD					
Debbie DePetrus	Clark Public Utilities					
Fred Gordon	Energy Trust					
Quentin Nesbitt	Idaho Power					
Danie Williams / Whitney Jurenic	NorthWestern					
Kevin Smit	NWPCC					
Laura James	Pacific Power					
Jake Wise	PGE					
Jeff Tripp	PSE					
Lori Moen	Seattle City Light					
Jeff Feinberg	Snohomish PUD					
Bryan Russo	Tacoma Power					
Heather Moline	WUTC					





## ***Yea buts... How abouts... What ifs...***

- Work in advance to draw out show-stoppers
- [Charter](#) provides guidance on next steps and ensures transparency



# RPAC VOTE: Program Advancement – Advanced Heat Pumps (AHP)

---

(packet pg. 5 - 20)

**Emily Moore**  
*Director – Electric Portfolio*

**Suzi Asmus**  
*Senior Program Manager*







# 2023: Electric Portfolio by Maturity Stage





# Program Advancement: What does a 'yes' vote mean?







# Portfolio Fit & Value

Savings Potential	Portfolio Risk (0-6)	Impact to Portfolio
~21 aMW 20-year co-created savings (LLE only)	<p>Below median: 3.0 score</p> <ul style="list-style-type: none"><li>- Technology is available in the market, proven MT interventions</li><li>- Measurability, cost effectiveness and ramp speed could vary by improvement</li></ul>	<p>Opportunity for mid-long term savings</p> <p>Flexible approach to respond to rapid technology advancements</p> <p>Good regional equity over long-term</p>



# *Advanced Heat Pump Program Transition to Market Development*



## ***Market Transformation Approach***

To address the market's lack of awareness of what delivers efficiency and ability to competitively differentiate advanced heat pumps, NEEA aims to do the following for each improvement:

- (1) Validate energy savings and establish metrics to identify qualifying products for each improvement.
- (2) Build support among manufacturers and efficiency program partners for incorporating recommended improvements into specs and standards.
- (3) Leverage existing regional and national training and marketing delivered by manufacturers, distributors, and efficiency programs to disseminate improvements to contractors and consumers with contributed content, data, specifications, and information on product identification.



## ***Why this approach?***

- Leverage heat pump market momentum towards efficiency
- Address barriers where NEEA has a unique role to play
- Build greater efficiency into out-of-the-box systems over time with little to no incremental cost



# Heat Pump Promotion Goes Mainstream

WSJ <https://www.wsj.com/articles/heat-pump-energy-bill-gas-furnaces-11666364907>

## Will a Heat Pump Save Money on Your Energy Bill This

Oct 24, 2022 - Photo Illustration by Chaya Howell/The Wall Street Journal, iStock

CR <https://www.consumerreports.org/appliances/heat-pumps/buying-guide>

## Best Heat Pump Buying Guide - Consumer Reports

May 26, 2022 - Consumer Reports members can also view our heat pump ratings for the most reliable brands of ducted **heat pumps** and the brands with the highest owner satisfaction. Our ratings include

A <https://www.aarp.org/home-family/your-home/info-2023/heat-pump-guide.html>

## Heat Pumps Can Keep Your Home Warm and Cool. Should

NPR <https://www.npr.org/2023/04/01/1166267716/6-things-to-know-about-heat-pumps-a-climate>

## 6 things to know about heat pumps, a climate solution in a box

Apr 1, 2023 - An IRS spokesperson tells NPR that the **new** credits can translate to up to \$2000 for efficient **heat pumps** bought after January 1, 2023. If you buy a **new** heat pump, Nadel says to keep

NYT <https://www.nytimes.com/2021/06/30/climate/heat-pumps-climate>

## Are 'Heat Pumps' the Answer to Heat Waves? Some

Jun 30, 2021 - Some Cities Think So. Electric **heat pumps** are a way to cool and heat homes at a much lower carbon cost than traditional air-conditioners and furnaces. 230. Installing a mini-split heating and

CNN <https://www.cnn.com/2022/09/16/us/heat-pumps-energy-costs-lbg-climate>

## Heat pumps: The super-efficient appliance that could save

Sep 16, 2022 - The cost of heating oil in Maine has steadily risen from around \$1 per gallon in 2008 to more than \$4.50 per gallon in 2022. The UK will give homeowners \$7,000 to buy **heat pumps**. But what are they ...

B <https://www.bloomberg.com/news/articles/2022-12-27/five-questions-to-ask-before-you-buy-a-heat-pump>

## Five Questions to Ask Before You Buy a Heat Pump - Bloomberg

Dec 27, 2022 - December 27, 2022 at 1:00 AM PST Listen 5:01 **Heat pumps** are one of the most effective ways to shrink your home's carbon footprint and your utility bills at a time of rising electricity

→ <https://www.theguardian.com/us-news/2023/mar/11/heat-pump-revolution-what-you-need-to-know>

## The heat pump revolution is here. This is what you need to know

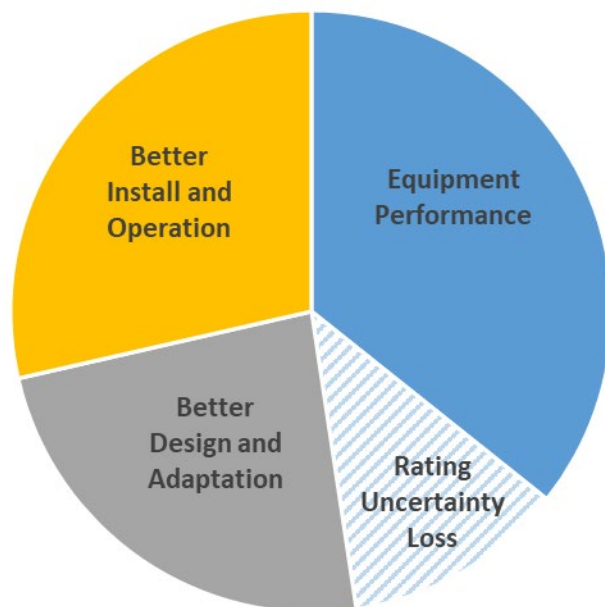
Mar 11, 2023 - In the **US**, the Inflation Reduction Act includes tax credits that cover 30% of the cost of a heat pump up to \$2,000 (about £1,700). For households with under 80% of the median area income, the law ...





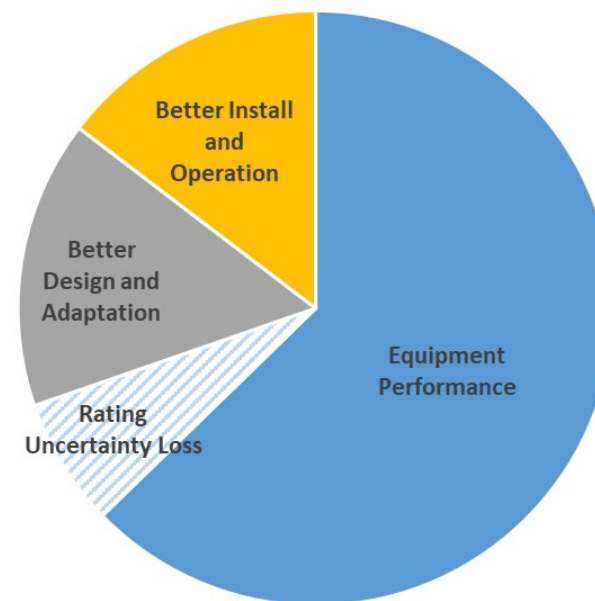
# Market Transformation Vision

Today



Improved Rating,  
Test Procedure, and  
Federal Standards)  
+  
Equipment Performance  
Improvements

2030





## *General Themes from RPAC Members*

- How do we mitigate the back-up/auxiliary/electric resistance heat problem?
- Contractor training is still needed for the other pieces of the savings pie: better sizing, installation, back-up heat - today
- Why do we expect manufacturers will expand availability of these improvements?
- How does the program approach benefit rural or lagging markets?
- Will these improvements need broader alignment with other regions outside the Northwest?
- How is NEEA prioritizing the improvements?

A faint, light blue geometric logo is centered in the background. It consists of several overlapping, nested shapes that form a diamond-like pattern, resembling a stylized 'S' or a series of interlocking lines.

# Q&A / *Discussion*



# *RPAC Vote:* *‘Program Advancement’ Milestone*

## *Advanced Heat Pumps*

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Bryan Russo	Tacoma Power					
Heather Moline	WUTC					





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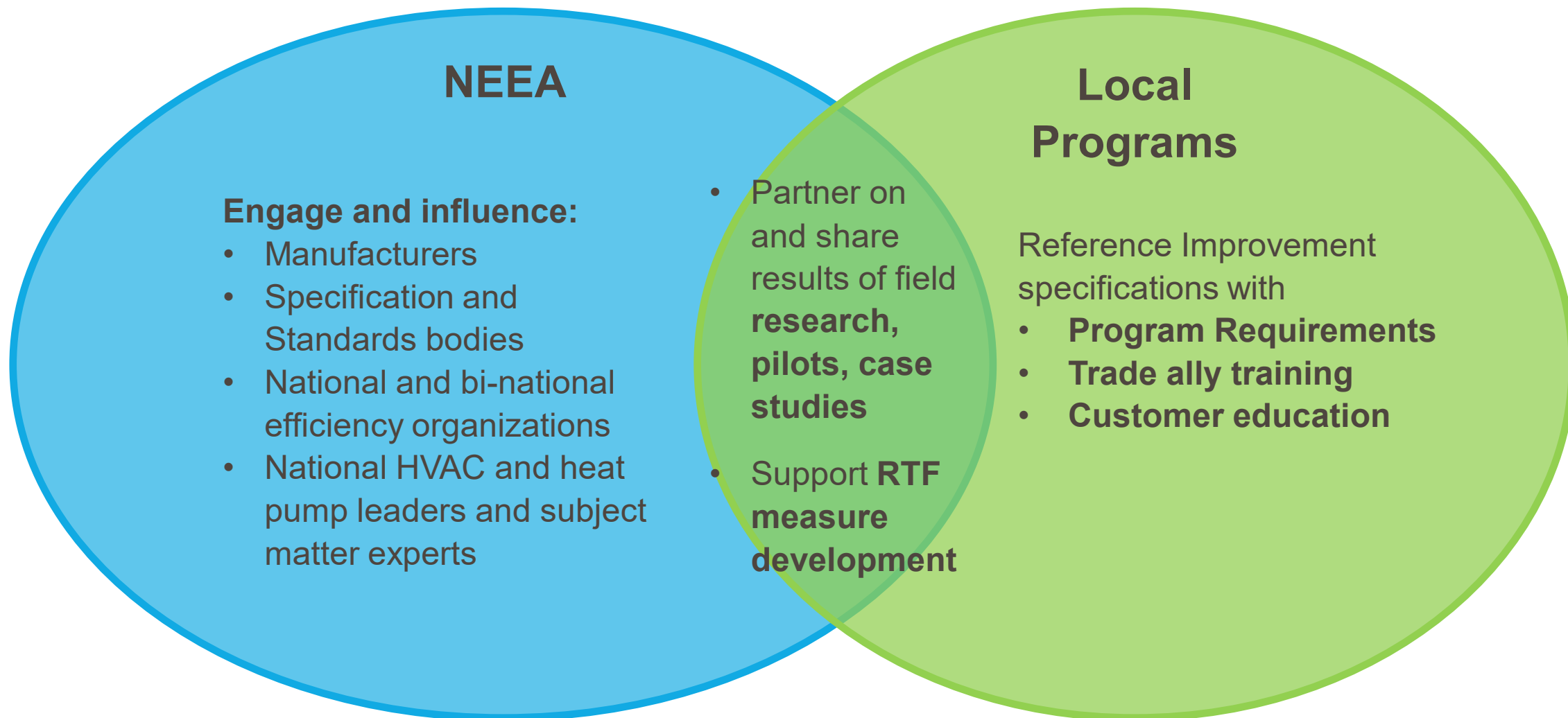
# *Reference Slides*



## ***What We Learned***

- Heat pump adoption is growing
- Opportunity to better differentiate efficiency among heat pumps
- Leading manufacturers agree with the need for better differentiation
- Savings possible with little to no incremental cost

# *Regional Collaboration*



» Thank you!

Suzi Asmus, VSHP Program Manager  
SAsmus@neea.org







***Break!***





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## *Round Robin*

- Big changes (programs/personnel)
  - Current challenges, lessons learned
  - How utility activities relate to NEEA's
    - Sharable tools/materials
    - Equity, underserved markets
    - Findings, filings, IRPs





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12:40-1:30	<a href="#">RPAC VOTE</a> : Advanced Heat Pumps (AHP) 'Program Advancement'	
10 min	BREAK	
1:40-2:35	<b>RPAC Round Robin</b> <ul style="list-style-type: none"><li>• Big changes (programs/personnel)</li><li>• Current challenges, lessons learned</li><li>• How utility activities relate to NEEA's</li></ul>	<ul style="list-style-type: none"><li>• Sharable tools/materials</li><li>• Equity, hard-to-reach markets</li><li>• Findings, filings, IRPs</li></ul>
2:35-2:50	<b>Work Groups Update</b> <ul style="list-style-type: none"><li>• Federal Funding Coordination (RPAC)</li><li>• Dual Fuel Product (NGAC)</li><li>• Dual Fuel Savings Methodology (CEAC)</li></ul>	
2:50-3:00	Public Comment, meeting debrief and adjourn	



## ➤ *Update on Active Work Groups*

- NW Federal Funding Coordination (RPAC)
- Dual Fuel Product (NGAC)
- Dual Fuel Measurement (CEAC)





## *(Northwest) Federal Funding Coordination Work Group*

**Reminder of Purpose:** Information sharing and regional coordination (where possible)

### **Recent Context:**

- [State-Based Home Energy Efficiency Contractor Training Grants](#)
- [Home Energy Rebate Programs](#)

Q2 Meeting (5/4): Kickoff  
& Roundtable Discussion



Q3 Meeting (8/23):  
Workforce Issues



Q3 Meeting (9/25): Home  
Rebates Programs & ...



## ***NGAC - Dual fuel work group***

**Purpose:** *Inform and accelerate dual fuel programs and market transformation within the region*

- **Who:** anyone working on dual fuel
- **Frequency:** 3-4x/yr; kicked off July 24, 2023
- **Time:** ~2-5 hrs/quarter

### **Participating Stakeholders**

- Northwest Natural Gas
- Cascade Natural Gas
- Puget Sound Energy
- Energy Trust of Oregon
- Avista





# ***CEAC\* - Dual Fuel Measurement Workgroup***



## **Purpose:**

Develop guidelines for NEEA to use when calculating and reporting **savings**, **peak** load reductions, and avoided **emissions** from Dual Fuel Market Transformation programs



## **CEAC-based workgroup**



**10-15 members**  
(NEEA funders, commission staff, and other technical experts)



**3-5 meetings from Q3 2023 to Q1 2024**



**Email Ryan Brown**  
([rbrown@neea.org](mailto:rbrown@neea.org))  
with questions

*\*CEAC = Cost Effectiveness Advisory Committee*



# Approximate Timeline

## Meeting 1 - August

- Work group background and objective
- Groundrules and expectations

## Meeting 2 - October

- Results of literature review
- Proposed outline of guideline document

## First draft distributed

- Work group feedback provided asynchronously

## Meeting 3 - December

- Discuss feedback and how it will be incorporated
- Determine if more rounds of review are needed

## Final draft distributed

- When ready, the near-final draft will be distributed for final review

## Meeting 4 - February

- Final draft overview and celebration!

## Advisory Committees

- Share with the Cost Effectiveness, Natural Gas, and Regional Portfolio Advisory Committees



A piece of brown paper with a string tied in a bow. The string is a light brown, twisted cord. It is tied in a bow that is centered on the right side of the paper. The bow has two loops, one pointing upwards and one pointing downwards. The string extends horizontally across the middle of the paper, and then vertically down the right side. The background is a solid, textured brown paper.

***Let's wrap it up!***





## *Action Items | Any Final Qs?*



- Action Items
  - XX

- Action Items



## Meeting Feedback

- ✓ *What was helpful?*
- ✓ *What could be improved?*
- ✓ *Would you like us to follow up with you on anything?*





***Public Comment?***



# Thank you, RPAC!

Draft 2023 Operations Plan Webinar: October 26

Q4 Meeting (virtual?): Thursday, November 2

