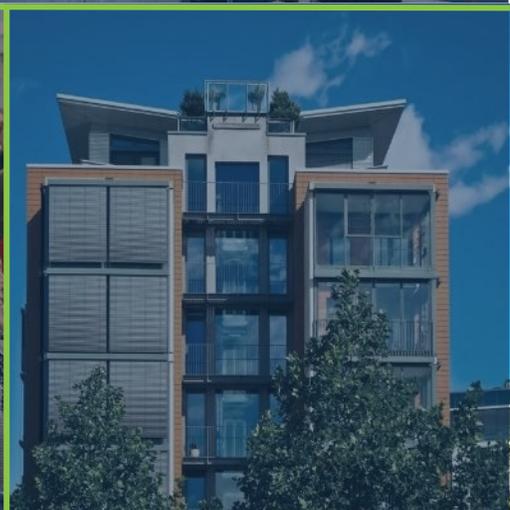




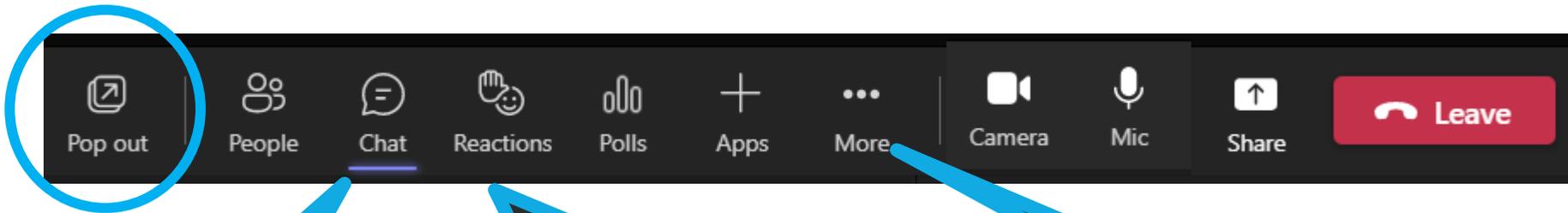
# Regional Portfolio Advisory Committee

**Q3 2024: Thursday, August 22**  
12:30 - 4:15 pm Pacific  
*Virtual*





# Tools for Today: Engaging on Teams

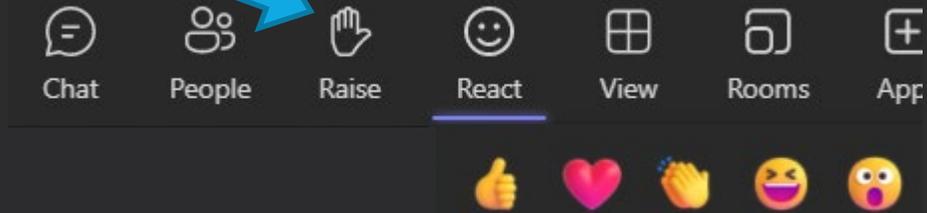


The chat is not captured in the recording.

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





# Reminder of Committee Purpose & Role



## *Purpose*

...to support Alliance success by **advising** on the **optimal composition of NEEA's program portfolio**, including a **formal vote for program advancement** at two key points in the Initiative Lifecycle, **consistent with the goals and objectives of NEEA's Business & Operations Plans.**



## *Responsibilities*

- Portfolio optimization & program advancement (milestone votes)
- Coordinate downstream marketing (RPAC+)
- Oversee coordinating committees and workgroups
- Monitor outcomes of all advisory committees
- Advises NEEA's Executive Director on portfolio decisions





# Agenda

*All times Pacific*

12:30-12:50	Welcome, Introductions and Agenda
12:50-1:05	Housekeeping and Looking Ahead
1:05-1:25	Coordinating Committee Assessment & Charter Change
10 min	<b>BREAK</b>
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# Packet Review & Informational Updates



- Tier 1: Agenda Items

- ✓ *Coordinating Committee Assessment + Charter Changes (pg. 3)*
- ✓ *Instituting 3<sup>rd</sup> Vote in Initiative Lifecycle @ Long-Term Monitoring & Tracking (LTMT) (pg. 9)*
- ✓ *Manufactured Homes – Market Transformation Highlights & Transition to LTMT (pg. 11)*

- Tier 2: Informational Updates

- ✓ *High-Performance Windows Program Update (pg. 16)*
- ✓ *Q2/Q3 Committee Updates (pg. 18)*

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

*Market Progress Report, committee materials (charters & recent meeting resources), functional newsletters (Market Research & Eval, Emerg Tech, Codes + Standards + New Construction)*





# *Introductions*

- Name
- Organization
- *And...*

**XXX**





## *Housekeeping & Looking Ahead*

- General Updates
  - HPWH Marketing Campaign
  - Staffing Update – Peter Christeleit
  - Workgroups
- Looking Ahead – RPAC
  - Q4 Charter Review
  - 2025 Proposed RPAC Meeting Dates
- Announcements & Reminders
  - Upcoming Meetings & Events
  - 2025 Ops Plan Webinar (Oct 16)
  - Leadership in EE Awards (Dec 5)
  - NEEA Annual Report



# Level Up Consumer Campaign

- Thank you again to everyone who participated in the development of the creative and messaging
- The campaign officially launched in August
  - [www.HotWaterSolutionsNW.org/Level-Up](http://www.HotWaterSolutionsNW.org/Level-Up)
- As before, we'll optimize the campaign only as needed and based on response
- Final performance will be presented at the Q1 2025 RPAC/RPAC+ meeting

Launched August 2024

System status 🟢

Ad Library API About ads and data use Privacy Terms Cookies

Meta © 2024 | English (US)



## *NEEA Staffing Update:*

***Welcome Peter Christeleit!***

New Role: Senior Manager –  
Corporate Strategy + Stakeholder  
Relations



# *Workgroup Updates*

## *Dual Fuel (Natural Gas)*

*Peter Christeleit – PChristeleit@neea.org*

## *Federal Funding*

*Jonathan Belais – Jbelais@neea.org*

## REGIONAL PORTFOLIO ADVISORY COMMITTEE CHARTER

### Review process:



<b>HISTORY</b>			
<b>Source</b>	<b>Date</b>	<b>Action/Notes</b>	<b>Next Review</b>
Board Decision	December 5, 2017	Board approval	Q2 2020
RPAC	November 13, 2019	Revised	Q1 2020
Executive Committee	November 14, 2019	Recommended Board approval	Q2 2025
Governance Committee	December 5, 2019	Recommended Board approval	Q2 2025
Board Decision	December 5, 2019	Board approval	Q2 2025
RPAC	February 23, 2022	Revised	Q1 2023
Governance Committee	May 13, 2022	Recommended Board approval	Q2 2025
Executive Committee	May 26, 2022	Recommended Board approval	Q2 2025
Board Decision	June 22, 2022	Board approval	Q2 2025

### ***Purpose***

The purpose of the Regional Portfolio Advisory Committee (Advisory Committee) is to support Alliance success by advising on the optimal composition of NEEA's program portfolio, including a formal vote for program advancement at two key points in the Initiative Lifecycle, consistent with the goals and objectives of NEEA's then-current Business Plan and annual Operations Plan.

RPAC is a leadership advisory committee with a formal voting function that is used to advise NEEA's Executive Director on portfolio management. As such, RPAC Members have significant influence on alliance work and are expected to be sufficiently resourced to perform this function. This includes working within RPAC Member organizations to assure that the expertise needed to inform alliance work is represented on supporting advisory committees and work groups (i.e. right people, right topic, right time).

### ***Responsibilities***

1. To support effective portfolio performance consistent with the goals, strategies and objectives of NEEA's Business Plan, review and advise



## *Heads up: Q4 RPAC charter review*

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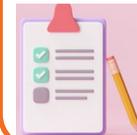
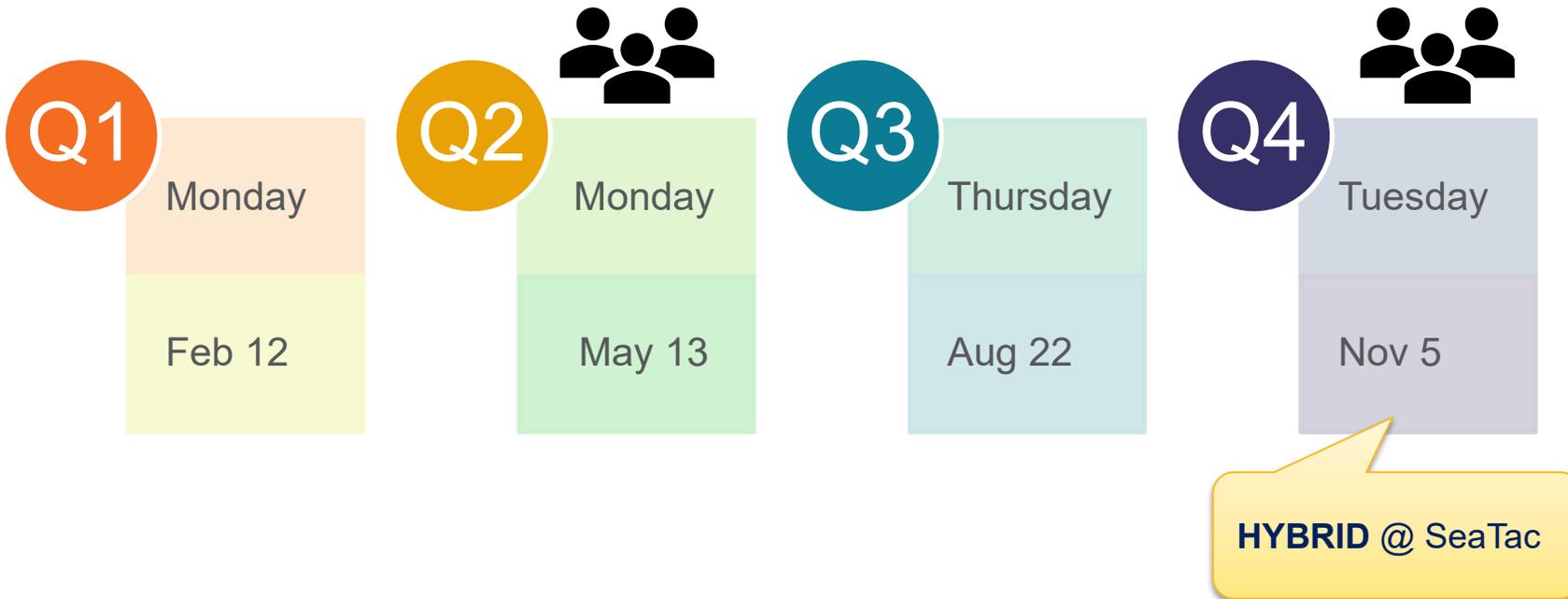
*Announcements, Reminders  
+ Upcoming Events*



# 2024 RPAC Meeting Schedule

## 2025 Proposed Dates – *Feedback Requested*

**Reminder: *Hybrid in Q4***



### Q4 In-Person Attendance Poll:

- ✓ Yes
- ✓ No
- ✓ TBD

### Proposed 2025 dates

Q1 - Tuesday, Feb 11

Q2 - Monday, May 19 (Hybrid @EFX25)

Q3 - Tuesday, Aug 19

Q4 - Monday, Nov 3 (Hybrid?)

*Any major flags / critical adjustments?*

➤ **Feedback due Thurs Sept 26**





# 2025 Operations Plan Timeline



**Oct. 10:** Full draft plan sent to Board, RPAC & NGAC

**Oct. 10 – Oct. 28:** Feedback period for Board and committee members

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



# LEADERSHIP IN ENERGY EFFICIENCY AWARDS

Help us honor the innovators and collaborators driving energy efficiency across the Northwest and beyond. NEEA will recognize individuals and teams for their exemplary dedication and performance in the industry during lunch on the first day of the NEEA Annual Board Meeting on December 5.

Nominations can be made in the following categories:

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

## Nominations

Aug 05  
Through  
Sept 13

## Event

Dec 05



To nominate go to:  
[nea.org/leadershipawards](https://nea.org/leadershipawards)



# NEEA 2023 Annual Report now available on [neea.org](https://neea.org)

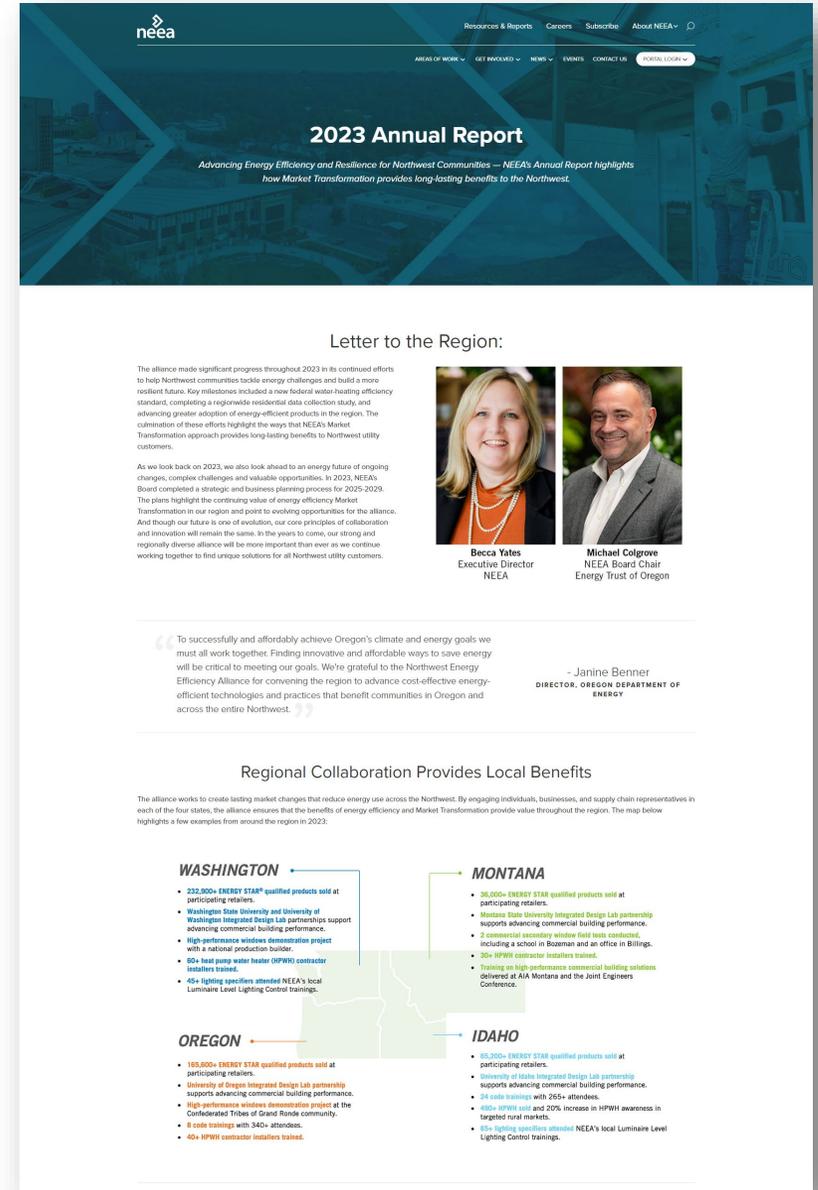


Energy efficiency is an essential, affordable resource to help the Northwest’s homes and businesses navigate a more resilient future. The alliance is committed to delivering Market Transformation that meets future demand, addresses capacity and policy needs, and delivers comfort and efficiency to communities all across the region.



— Becca Yates  
NEEA Executive Director

View the full report at [neea.org/annualreport](https://neea.org/annualreport)





# Upcoming NEEA Meetings

## August (Q3)

- 28th Cost Effectiveness & Evaluation Advisory Committee (CEAC)

## September (Q3)

- 9-10<sup>th</sup> Q3 Board Meeting (Boise, ID)
- 12<sup>th</sup> Products Coordinating Committee (PCC)
- 25<sup>th</sup> Regional Emerging Technology Advisory Committee (RETAC)

## October (Q4)

- **16<sup>th</sup> 2025 Draft Operations Plan Webinar**
- 22<sup>nd</sup> Natural Gas Advisory Committee (NGAC)

## November (Q4)

- 4<sup>th</sup> Cost Effectiveness & Evaluation Advisory Committee (CEAC)
- **5<sup>th</sup> Regional Portfolio Advisory Committee (RPAC)**
- 6-7<sup>th</sup> Integrated Systems Coordinating Committee (ISCC)



*Other regional /  
industry events or  
announcements?*





# Agenda

*All times Pacific*

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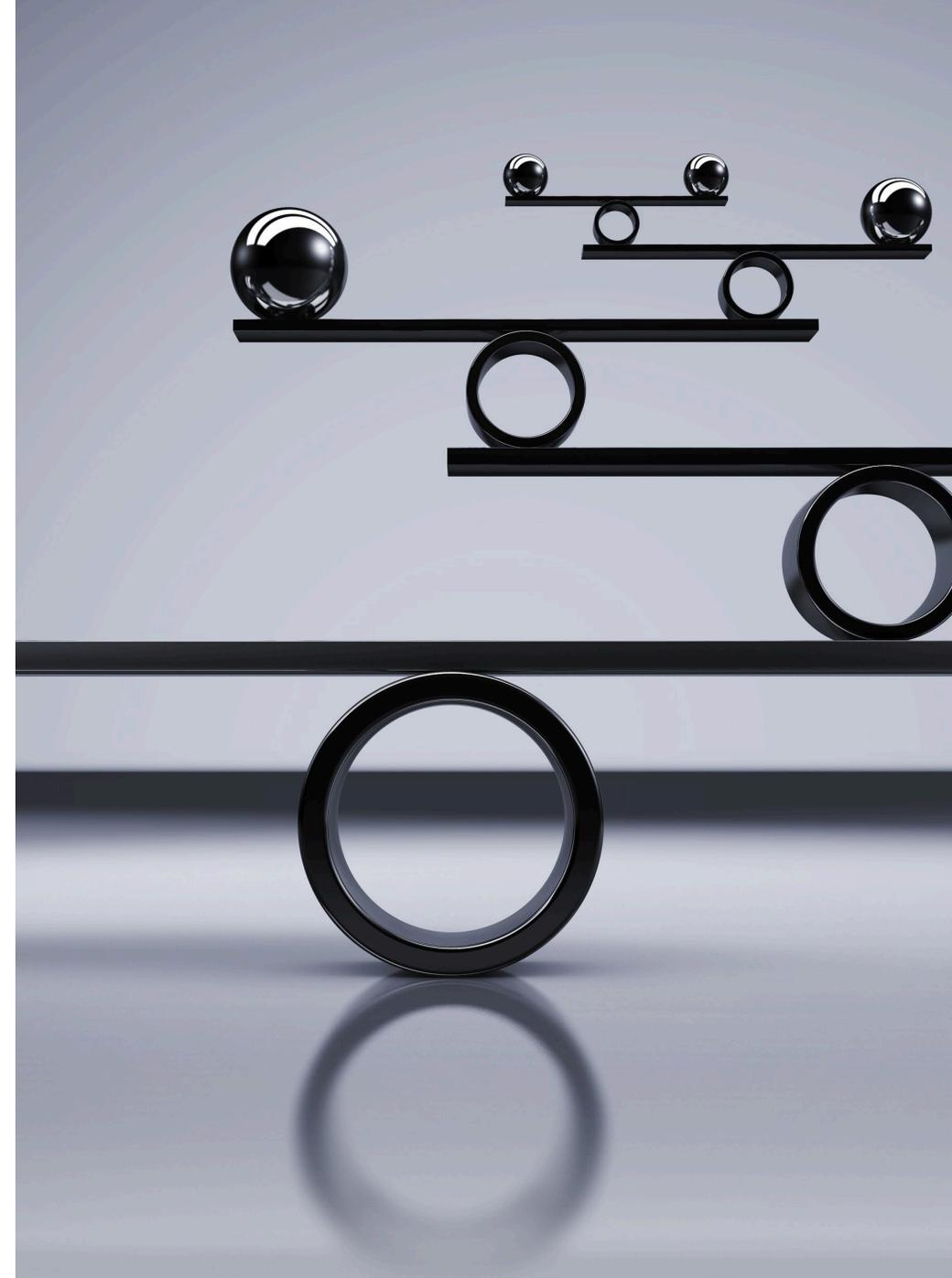
# Coordinating Committee (CC) Assessment

---

*Alisyn Maggiora*

[amaggiora@neea.org](mailto:amaggiora@neea.org)

*Sr. Stakeholder Relations Manager*



# *Coordinating Committee Assessment*

## *Topic Agenda*

---



- 1. Ask of you Today*
- 2. Context*
- 3. Proposal Review*
- 4. Next Steps*
- 5. Discussion / feedback*





## *Ask of You Today*

- Consider the proposed changes
- Offer feedback

## *Next Step*

- Oct 1 – final input from RPAC due
- Q4
  - Provide final recommended changes to coordinating committees
  - Circle back with RPAC with anything different than what's proposed today



## CONTEXT:



### **Coordinating Committee (CC) Assessment**

#### ➤ **Focus areas:**

- Structure, content flexibility, # of meetings

#### ➤ **Goals:**

- Identify areas for improvement and support transition to Cycle 7 (2025-29)
- Ensure regional value delivery and effective resource allocation.

## Stakeholder Survey + 1:1s:



### *What we heard Re: Coordinating Committee improvements*



**Reduce meeting frequency**

**Increase agenda flexibility**

**At least 1 hybrid meeting/year**

**Look at streamlining materials**

**Utility / sector alignment**



# *Proposal*



# Continuous Improvement Efforts

## Recent Improvements (2024):

### Program Swap

- Pumps & Fans → ISCC
- Adv HPs & Windows → PCC

### Increase Agenda Flexibility

- Regional Priority Topic check-in every quarter
- Dedicated ad-hoc topic time

## Proposed Improvements (2025+):

### Rename Committees w/ Sector

- Residential Coordinating Committee (RCC)
- Commercial & Industrial “ “ (CICC)

### 3 Meetings a year

- Q1 & Q4: (2) half-day meeting (1 hybrid/yr)
- Q2: 1 half-day webinar with program focused breakouts



## *Proposal: 3 Key Takeaways*

- 1. Sector organized & renamed accordingly**
- 2. Lighten the load**
  - 3 meetings/year (summer break)
  - Continue to streamline materials
- 3. Increase flexibility**
  - Incorporate “breakouts”
  - Balance ad-hoc topics & regional coordination topics



# CC Assessment Next Steps

Time	Task
May/June	Discuss assessment insights and share proposed improvements with coordinating committees
June/July	Internal recommendation review/feedback; CC members discuss w/ Anouksha in 1:1s
August 22	Present proposal to RPAC for consultation and feedback
August/September	Share RPAC feedback and confirm final adjustments w/ coordinating committees
November/December	Share final proposed changes to implement in 2025 (RPAC and coordinating committees)

We are here!





# POLL

## Select option 1 –OR– option 2

1. Incorporate proposed improvements
  - Sector reorganizing & renaming
  - 3 meetings / year
  - More flexibility in agenda (ad-hoc topic time & breakouts)
2. I have thoughts to consider before this proceeds; please contact me.

Have other ideas for the group to consider?

- Please share!

Options: Unmute, raise hand, put it in the chat, discuss 1:1





# *Coordinating Committee Charter Review*

# Review & Input



## Coordinating Committees (CC) “Universal Charter”

### Key proposed changes:

1. Combined into (1) “universal” charter for both CCs
2. Reorganized content & grammatical adjustments (per #1)
3. Added minor language to ensure alignment with NEEA bylaws.

**Review process:**

<b>HISTORY</b>			
Source	Date	Action/Notes	Next Review Date
RPAC	November 13, 2019	Proposed Draft	Q1 2024 <input checked="" type="checkbox"/>
Governance Committee	TBD, by email	Recommended Board approval	Q2 2025
Executive Committee	TBD, by email	Recommended Board approval	Q2 2025
Board Decision	December 5, 2019	Board approval	Q2 2025

An orange callout bubble labeled "5-year Review" points to the "Next Review Date" column of the table.

**\*\*Final Input Due Oct 1\*\***

## ➤ Discussion

- *Thoughts?*
- *Questions?*
- *Ideas?*

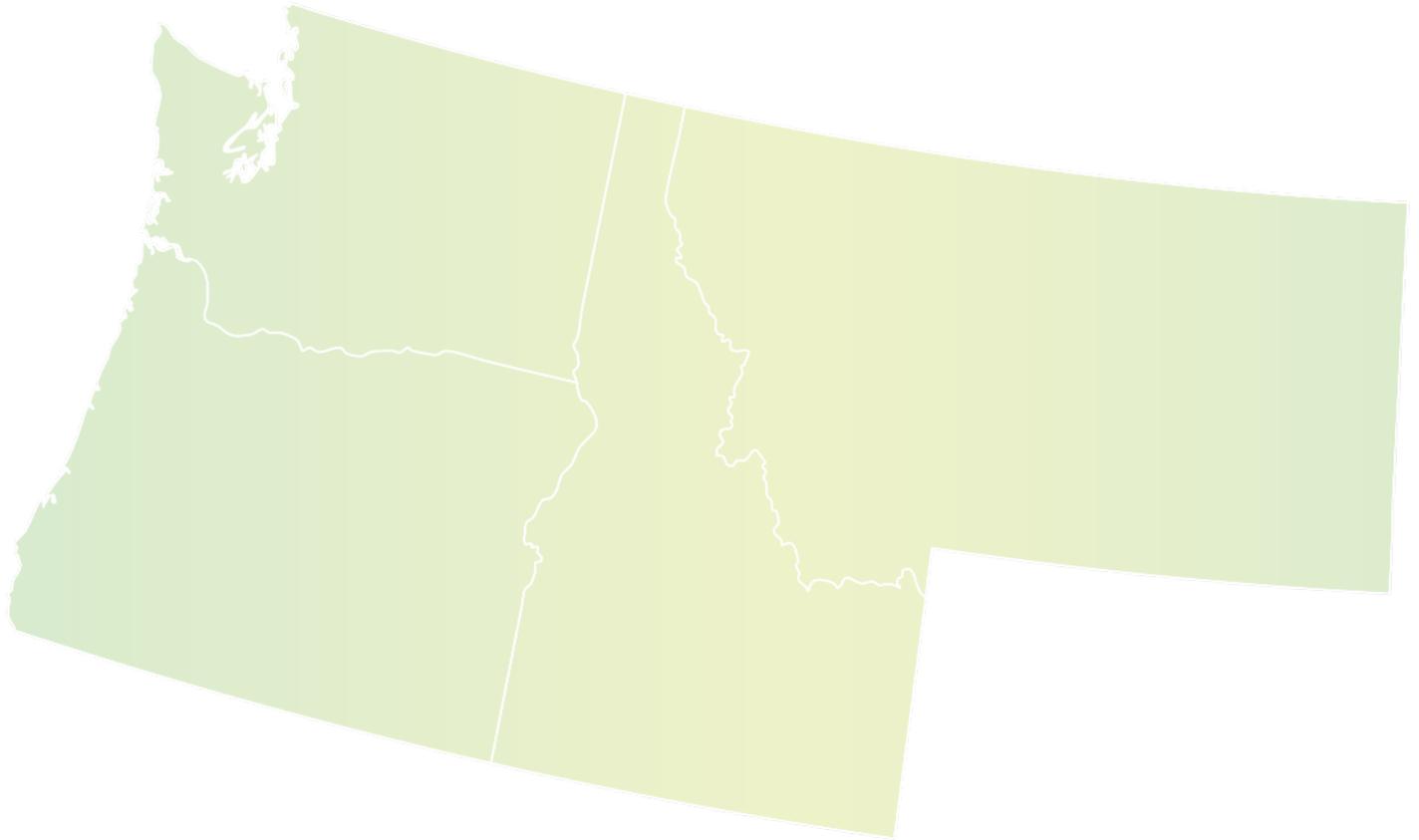




# Thank you RPAC!

Alisyn Maggiora

[amaggiora@neea.org](mailto:amaggiora@neea.org)



*Let's take a break!*





# Agenda

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## *Instituting a Third ILC Milestone Vote at Long-Term Monitoring & Tracking (LTMT)*

**Alisyn Maggiora**

*Sr. Stakeholder Relations Manager*

*August 22, 2024*



# Coordinating Committee Assessment



## Topic Agenda

1. *Refresher: Initiative Lifecycle & Voting Process*
2. *Refresher: Current Long-Term Monitoring Tracking (LTMT) transition process*
3. *Proposal: Instill 3<sup>rd</sup> vote @ LTMT*
4. *Why / Why now?*
5. *Next Steps*
6. *Input & Discussion*

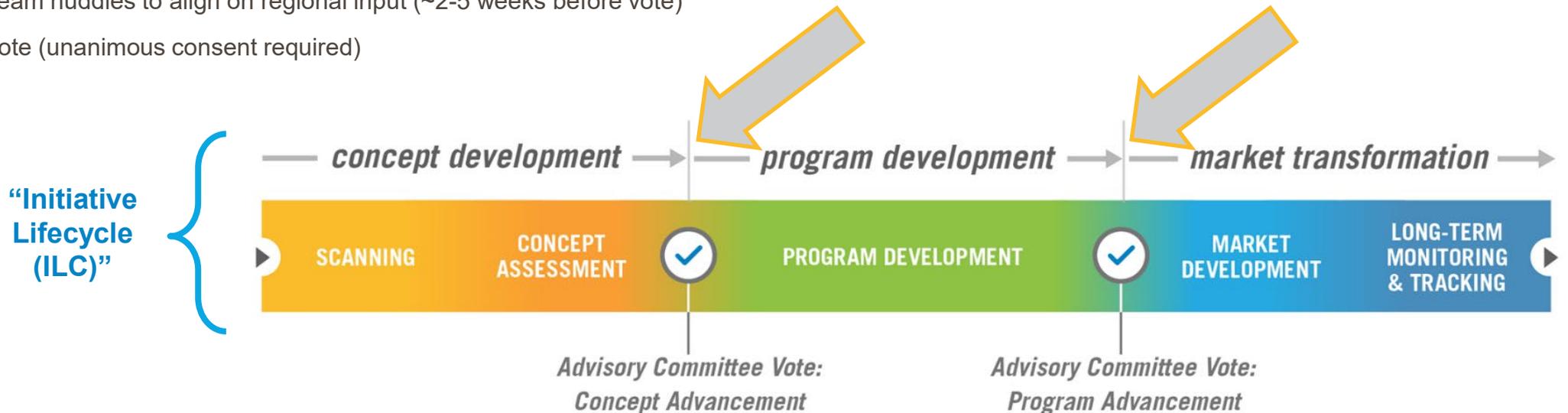




# Quick Refresher – Vote Process

6-month process

- **Related RPAC Responsibilities:**
  - Portfolio optimization (regional perspective) & program advancement (milestone votes)
- **Current RPAC Decision Points:**
  - Concept Advancement & Program Advancement milestones
- **Vote Prep Process:**
  1. “Tee-Up” presentation (~ 6 months before vote)
  2. Full presentation (~3 months before vote)
  3. Business Case / Milestone Doc emailed (~6 weeks before vote)
  4. Team huddles to align on regional input (~2-5 weeks before vote)
  5. Vote (unanimous consent required)





# Current Process for Transitioning a Program to Long-Term Monitoring & Tracking

6-12 month process

1. **“Tee-Up” presentation** (~ 6-12 months before transition is planned)
2. **Transition Market Progress Evaluation Report (T-MPER) published** (typically ~3-6 months before transition is planned)
3. **Overview of results of T-MPER** (~3-4 months before transition is planned)
4. **Announce plans to transition** (~1-2 months before transition is planned)

Input / feedback invited throughout





# Proposed 3<sup>rd</sup> Vote @ Long-Term Monitoring & Tracking

Existing process / no change proposed



## Milestone Documentation

- T-MPER\* (in place of milestone doc) + RPAC memo

## Feedback process

- Open call for feedback (in lieu of dedicated call-down/huddle process unless requested)



## Vote

- Unanimous consent, like the other 2 milestone votes

“Initiative Lifecycle (ILC)”





## *Context: Why now?*

- C7 Goal: Supports equitable delivery of MT efforts
- Increased transparency w/ 1-off requests to stay in a local market
- Formalize RPAC voice in LTMT



# Next Steps: Timing for charter changes



Q3

- Input from staff
- Tee-up w/ NGAC & RPAC



Q4

- RPAC & NGAC \*recommend\* charter changes to Board



Q1'25

- Board reviews/ approves charter changes



# Input – What other implications should we consider?

- **Documentation**
  - T-MPER\* + RPAC Memo
- **Feedback process**
  - Open call for feedback
- **Vote**
  - Unanimous consent, like the other 2 milestone votes

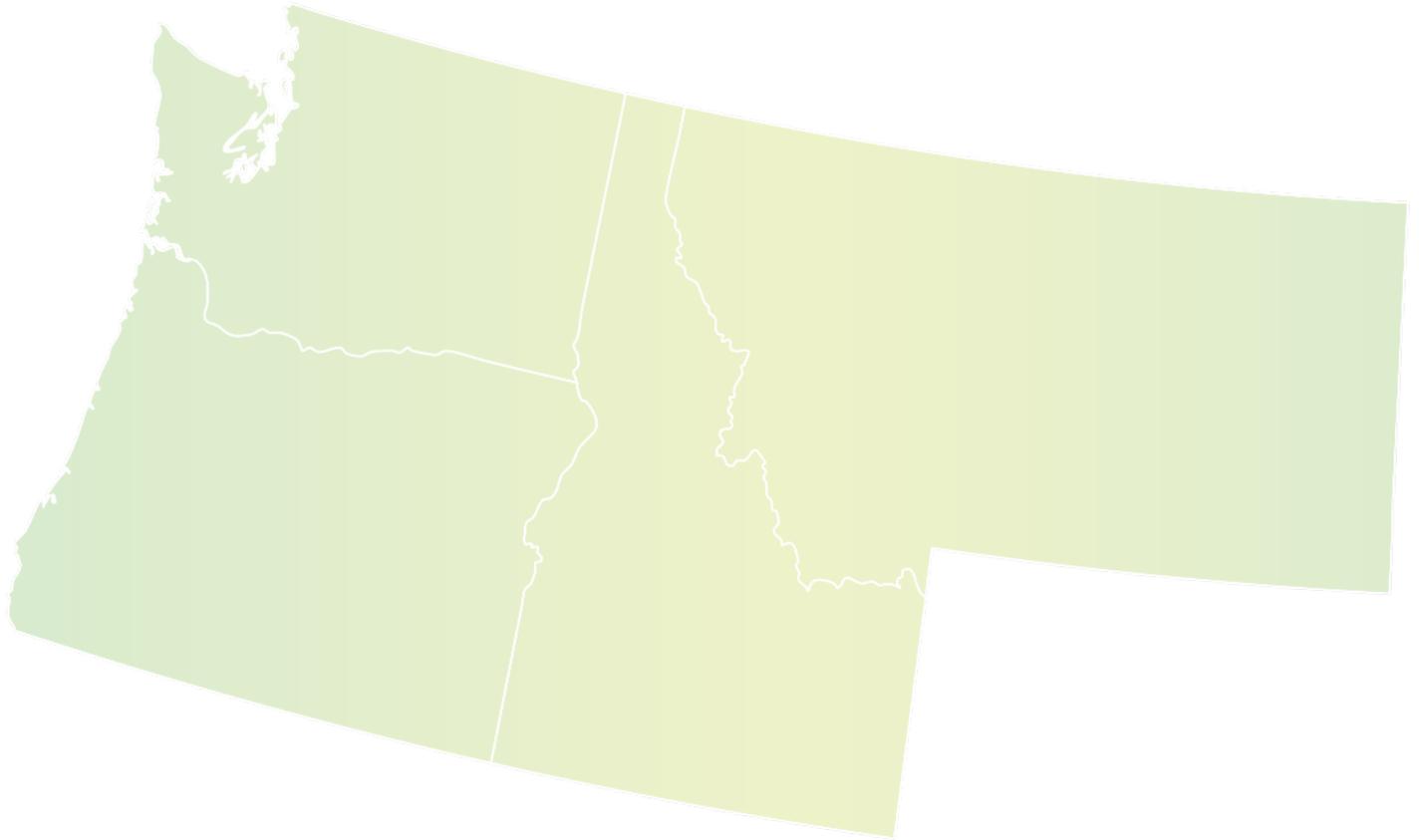




# Thank you RPAC!

Alisyn Maggiora

[amaggiora@neea.org](mailto:amaggiora@neea.org)





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## *Manufactured Homes Program Transition to Long-Term Monitoring & Tracking (LTMT)*

**Mark Rehley**

*Director – Codes, Standards, New Construction, Emerging Tech*

*August 22, 2024*





# Moving to Long-Term Monitoring & Tracking



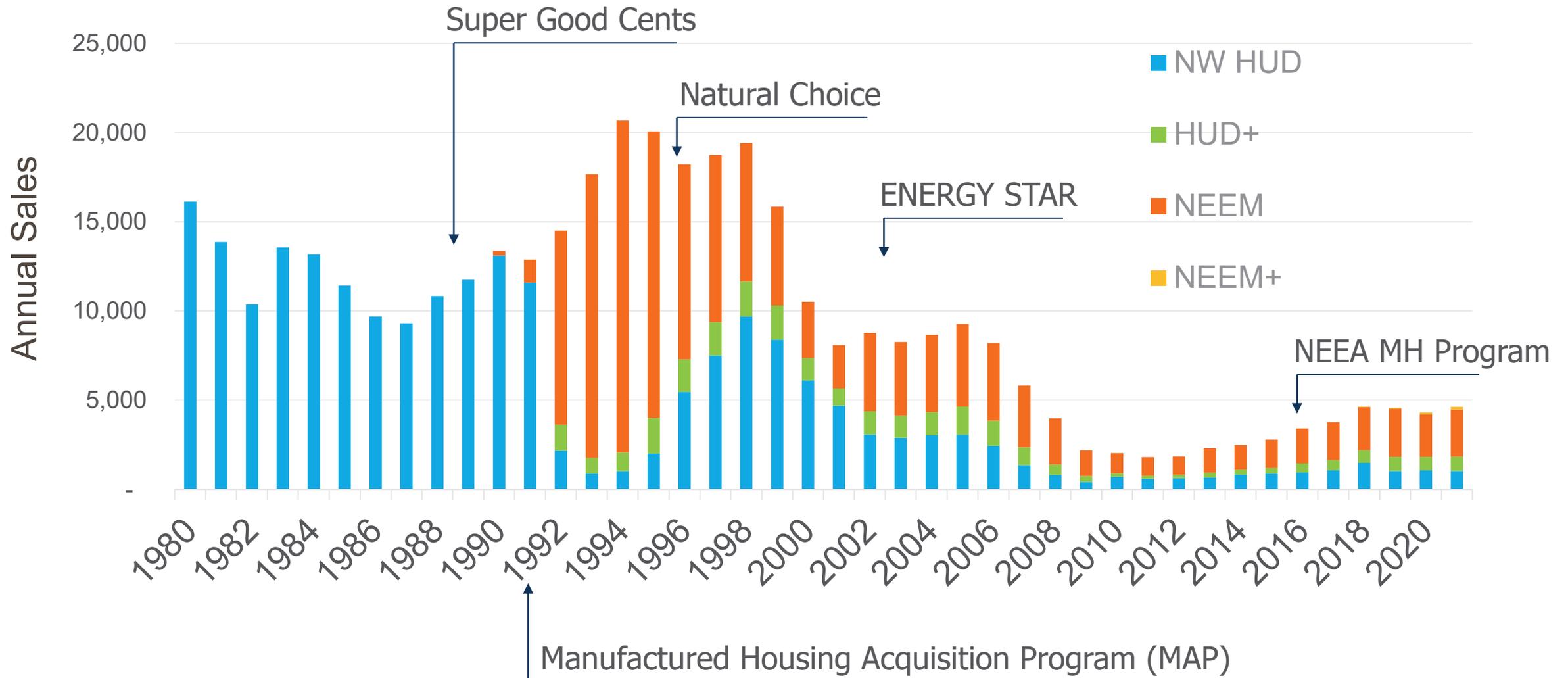


## *What you need to know: Key Takeaways*

- NEEA's Manufactured Homes Program is moving to the Long-Term Monitoring & Tracking Phase LTMT.
- The program will continue to:
  - Track adoption and diffusion of NEEM+
  - Track the Federal standard and HUD code and their effective dates
  - Coordinate with ENERGY STAR
  - Track adoption of DOE's Net Zero Ready Spec
  - Test heat pumps in manufactured homes and measure energy savings potential
  - Maintain relationships with NEEM and manufacturers



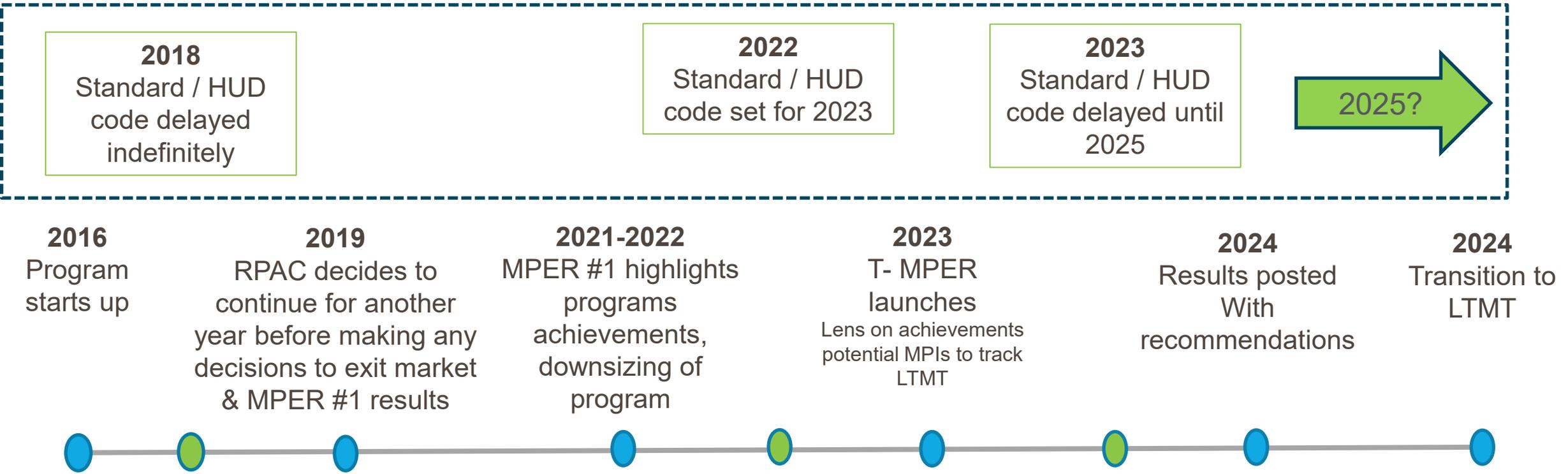
# Manufactured Home Programs and Sales History





# NEEA's Manufactured Homes Program

The program has supported the Northwest Energy Efficient Manufactured Housing Program (NEEM)+ specification, developed by Northwest Energy Works since 2014.



MPER #1 & T-MPER completed by Apex Analytics, LLC



# MT Accomplishments / Market Progress Highlights

## Barriers

Limited Product Availability

Higher First Cost

Knowledge/Capability  
(Mfrs, Retailers, Appraisers)

## Interventions

Collaborate with factories and NEEM program to establish NEEM2.0 Spec

Provide Market Actors with support to build expertise in building and selling NEEM 2.0

Establish a regional upstream incentive system for NEEM 2.0

## Market Progress Indicators

**Manufacturers are able to build to the NEEM+ specification.**

Met

**Factory trainings in NEEM+ construction are held and test homes are built.**

Met

**Manufactured home retailers increase sales of NEEM+ homes.**

Met

**Incented incremental cost of NEEM+ is less than 5% over comparable homes.**

Met



## ***Market has achieved stable position***

**NEEM+ market share is currently low, but stable.**

Manufacturers see NEEM+ as a niche offering, appealing to customers who are either particularly concerned about energy efficiency or are siting homes in jurisdictions that require manufactured homes to meet efficiency standards...Nonetheless, most manufacturers and retailers reported their NEEM+ home sales had been steady or had risen in the past two years.



# Recommendations

**Recommendation 1:** NEEA should continue to monitor the manufactured home market as the new ENERGY STAR specification takes effect in 2026 and the new federal standard takes effect in 2025.

**Recommendation 2:** NEEA and Northwest Energy Works should continue to work with EPA to support an update to the ENERGY STAR V3 specification that allows NEEM+ homes to qualify without installation of a heat pump.

**Recommendation 3:** NEEA and partner organizations like the Regional Technical Forum should conduct an analysis to assess the relative energy savings between ENERGY STAR V3 and ZERH manufactured homes and NEEM+ homes and assess typical installation practices to ensure specifications effectively drive manufactured home efficiency in the Northwest.



## The Road Ahead

- **Share** RPAC Memo – Q3 2024
- **Move** program to LTMT and begin measuring diffusion metrics
- **Coordinate** with ENERGY STAR and DOE to align NEEM+ (Managed by Codes and Standards)
- **Test** approaches to adding heat pumps (Scanning)



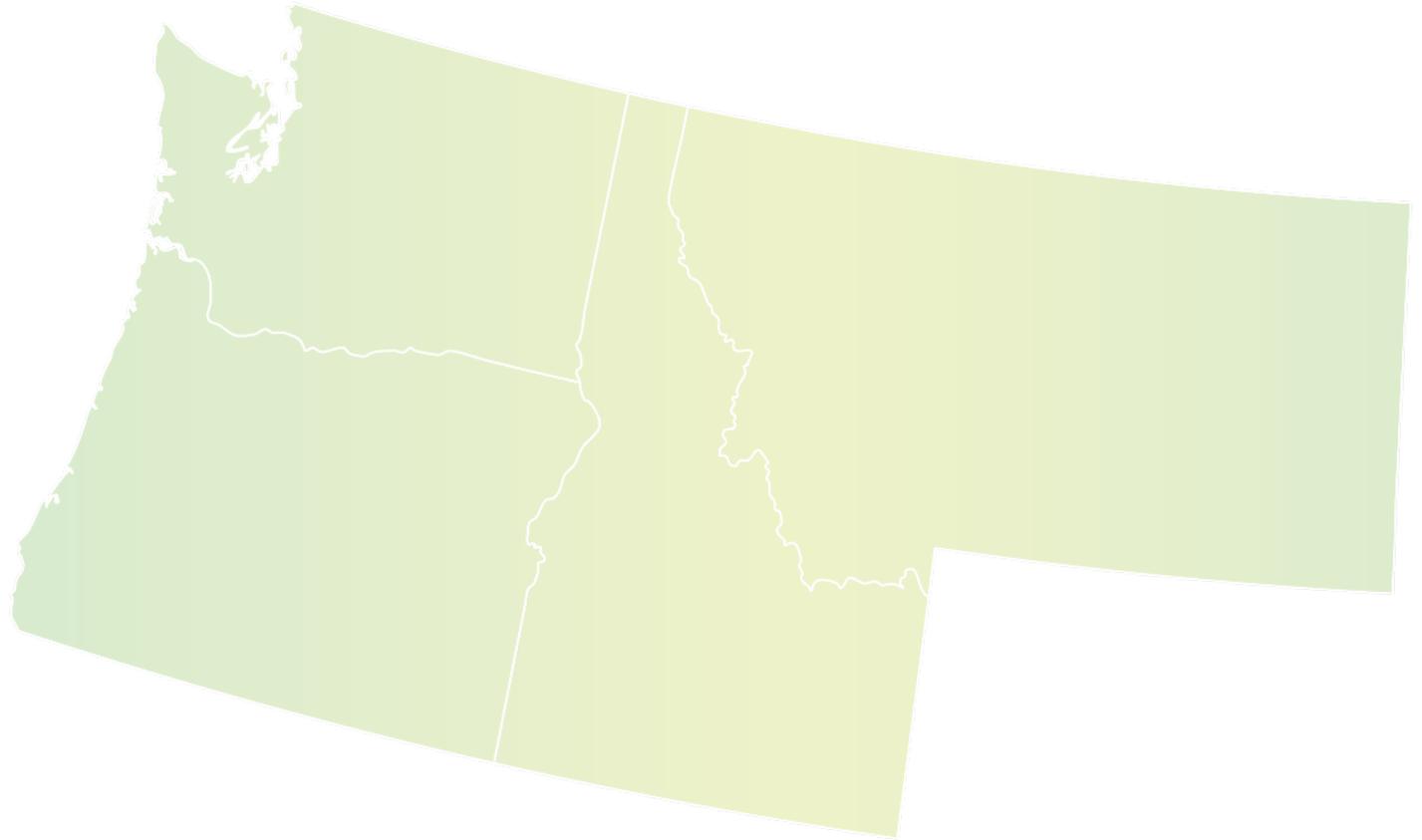
*Questions?*



# Thank you RPAC!

Mark Rehley

[MRehley@neea.org](mailto:MRehley@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



# ➤ *Stretch Break!*





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# *Peak Value for Portfolio Management in Cycle 7 (2025-29)*

**Ryan Brown**

*Manager – Planning & Analysis*

*August 22, 2024*





## *Key Takeaway*

- As new concepts and programs are brought for advancement decisions, we will include this program-level peak value





# Strategic Goals for 2025-2029

## **MISSION:**

NEEA catalyzes the most efficient use of energy for a thriving Northwest.

1

Transform Markets for **Energy Efficiency**

2

Accelerate the adoption of **Grid-Enabled End-Use Technologies** through Market Transformation

3

Advance strategies to **Reduce Greenhouse Gas Emissions** through Market Transformation

4

Advance the **Equitable Delivery of Energy Efficiency Benefits** to Northwest consumers through Market Transformation



## *2025-2029 Business Plan Focus Area:*

“Prioritizing energy savings at **peak demand** to ensure NEEA’s energy efficiency Market Transformation activities are delivering the highest value to the region.”



# Electric Portfolio Carrying into Cycle 7

Forecast for 2025



50+ Emerging Markets and Technologies



Room Heat Pumps



Efficient Drives



Commercial Heat Pump Water Heaters



Central Heat Pump Water Heaters



Dual Fuel HVAC systems

**Funding for 2-3 new programs to advance (2025-2029)**



Efficient Fans



Heat Pump Water Heaters



Retail Products Portfolio



Luminaire Level Lighting Controls



Extended Motor Products - Pumps



High-Performance HVAC



Advanced Heat Pumps

**Manufactured Homes**

Ductless Heat Pumps

Reduced Watt Lamp Replacement

Strategic Energy Management

New Construction Codes, Federal and State Product Standards

**concept development**

**program development**

**market transformation**

SCANNING

CONCEPT ASSESSMENT



PROGRAM DEVELOPMENT



MARKET DEVELOPMENT

LONG-TERM MONITORING & TRACKING

Key factors and decisions:

Managing resources to select the best new and expansion opportunities

Building leverage in dual fuel areas

Meeting new criteria of Cycle 7 Plan



# Portfolio Criteria

Energy Savings  
Potential

Cost  
Effectiveness

Risk Profile

Regional  
Distribution of  
Potential

Strategic Market  
Considerations

*new* Peak Impact

*TBD* Equity,  
Load Flexibility &  
Decarbonization  
Metrics



## *Proposed Approach – Passive Peak Impact*

### *Ratio of MW peak reduction per aMW*

- Methodology
  - **Source:** Regional load shapes (used by NWPCC)
  - **Tool:** [ProCost v5](#)
  - **Peak definition:**
    - **Winter** – 6pm on weekdays in Dec, Jan, Feb
    - **Summer** – 6pm on weekdays in July and Aug





# Current Preliminary Values

Program	DRAFT	DRAFT
	Winter Peak Ratio (MW/aMW)	Summer Peak Ratio (MW/aMW)
Ductless Heat Pumps	3.22	-0.20
Heat Pump Water Heaters	1.83	2.11
High-Performance HVAC	2.37	0.64
Luminaire Level Lighting Controls	1.64	1.32
Manufactured Homes	4.15	0.36
Commercial New Construction	2.25	1.59
Residential New Construction	2.57	1.68
Retail Product Portfolio	1.58	1.66
Advanced Heat Pumps	2.61	2.85
Extended Motor Products - Pumps	1.92	0.89

Question for  
the committee:

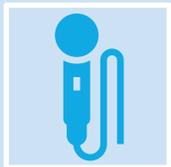
- Does this align with your understanding of the opportunities?



## *Additional Discussion*



Will this metric enable us to manage the portfolio to expectations of the 2025-2029 Business Plan?



What other recommendations do you have for NEEA's portfolio management on peak?



## *Key Takeaway*

- As new concepts and programs are brought for advancement decisions, we will include this program-level peak value

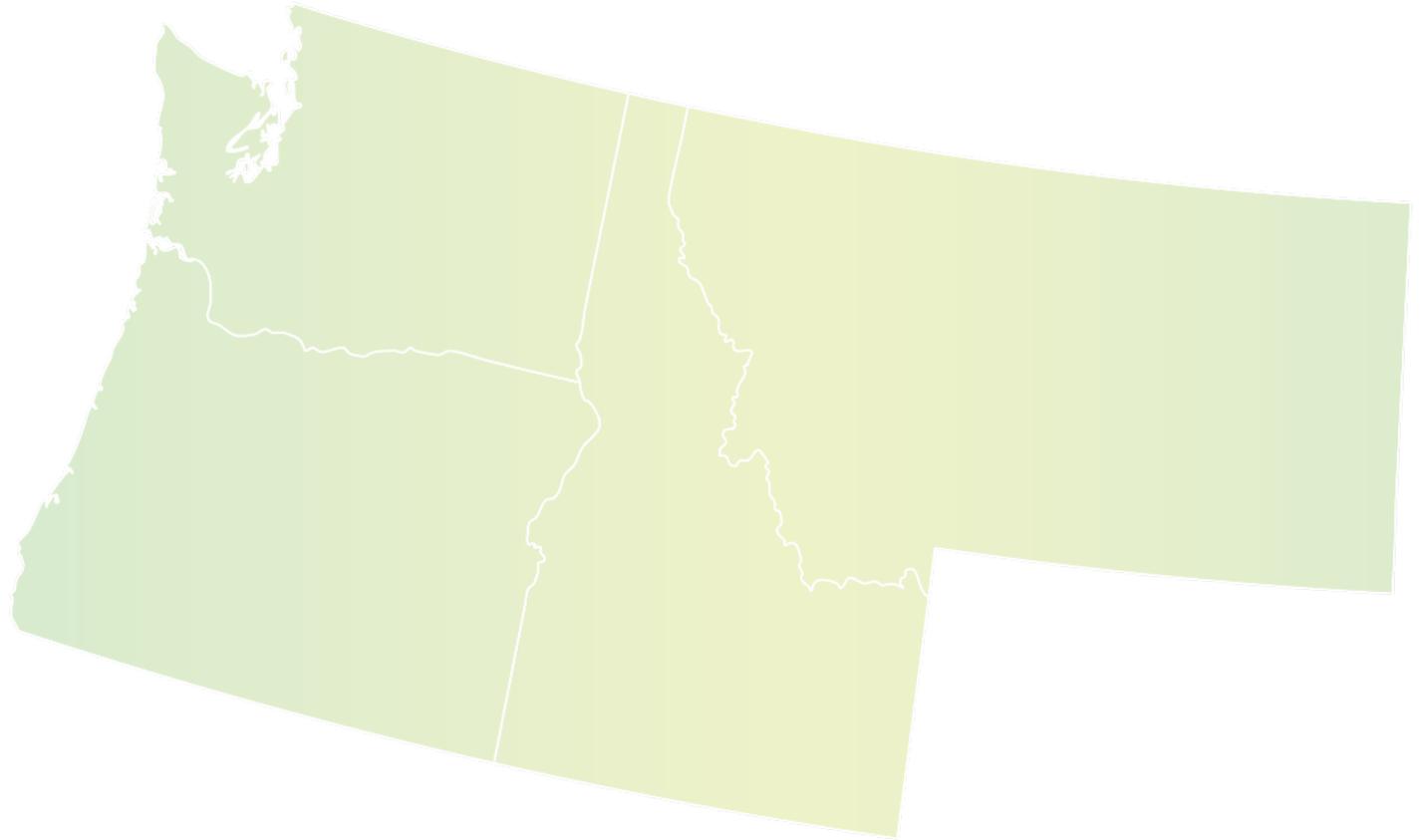




# Thank you RPAC!

Ryan Brown

[RBrown@neea.org](mailto:RBrown@neea.org)





# Agenda

*All times Pacific*

12:30-12:50	Welcome, Introductions and Agenda
12:50-1:05	Housekeeping and Looking Ahead
1:05-1:25	Coordinating Committee Assessment & Charter Change
10 min	<b>BREAK</b>
1:35-1:55	Instituting 3 <sup>rd</sup> Initiative Lifecycle (ILC) Vote at Long-Term Monitoring & Tracking (LTMT)
1:55-2:25	Manufactured Homes (Highlights + LTMT)
10 min	<b>BREAK</b>
2:35-3:20	RPAC Round Robin
10 min	<b>BREAK</b>
3:30-4:05	Peak Value for Portfolio Management in Cycle 7 (2025-29)
4:05-4:15	Wrap-Up & Adjourn



A piece of brown paper with a string tied in a bow around it. The string is a light brown color and is tied in a simple bow around the center of the paper. The paper has a slightly textured appearance.

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



## *Action Items | Any Final Qs?*



- Action Items



## Meeting Feedback

- ✓ *One thing you learned?*
- ✓ *What was helpful?*
- ✓ *Opportunities for improvement?*
- ✓ *Would you like us to follow up with you on anything?*





# *Public Comment?*



# Thank you, RPAC! Until we meet again...

Q4 Meeting (Hybrid): Tuesday, Nov 5 @ SeaTac

→ *Please plan to join us in person!*

