

Regional Portfolio Advisory Committee



DATE: Thursday, May 22, 2025
TIME: 9:00-12:00 Pacific
LOCATION: Hybrid @ NEEA’s office (700 NE Multnomah) & via Microsoft Teams
VIRTUAL: [Click here to join the meeting](#) (Meeting ID: 218 244 790 984 0 | Passcode: cp6Ls9gV)
 (if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 924 867 445#

AGENDA (All Times Pacific)

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9:00-9:20 <i>(20 min)</i>	Welcome, Introductions & Agenda / Packet Review	All	1-2
9:20-9:30 <i>(10 min)</i>	Housekeeping and Looking Ahead <ul style="list-style-type: none"> ● General Updates <ul style="list-style-type: none"> ○ Reporting Survey Results ● Announcements & Reminders <ul style="list-style-type: none"> ○ Neea.org website redesign ○ Upcoming Meetings <p><i>Desired Outcome: Committee aware of recent developments and upcoming topics for engagement.</i></p>	Alisyn Maggiora	--
9:30-9:45 <i>(15 min)</i>	Codes & Standards Update <ul style="list-style-type: none"> ● High-level update on codes and standards in the region and nationally. <p><i>Desired Outcome: Committee aware of recent codes activities and the status of federal standards.</i></p>	Mark Rehley	3
9:45-10:15 <i>(30 min)</i>	Electric Portfolio Update <ul style="list-style-type: none"> ● Portfolio status and energy savings outlook <p><i>Desired Outcome: Committee aware of risks and opportunities in the electric portfolio.</i></p>	Stephanie Rider	4-11
15 min	BREAK		
RPAC+ Marketing Presentation			
10:30-11:00 <i>(30 min)</i>	Heat Pump Water Heater (HPWH) Marketing Campaign <ul style="list-style-type: none"> ● Overview of proposed 2025 Level Up Consumer Awareness and Consideration Campaign <p><i>Desired Outcome: Committee informed on proposed marketing campaign optimizations in advance of Q3 election.</i></p>	Britt Cutsforth Dawkins	12
11:00-11:45 <i>(45 min)</i>	RPAC Round Robin <ul style="list-style-type: none"> ● Big changes (programs/personnel) ● Current challenges, lessons learned ● How utility activities relate to NEEA’s <ul style="list-style-type: none"> ● Sharable tools/materials ● Policy directives w/ customers ● Findings, filings, IRPs 	All	--
11:45-11:55 <i>(10 min)</i>	Wrap-Up & Adjourn	Alisyn Maggiora	--

Informational Updates:

- **Page 13:** NW Regional Online Marketplace Update
- **Page 14:** BPA Market Snapshot Update
- **Page 15-17:** Q4/Q1 Committee Updates
- **Page 18-29:** Q1 2025 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Reference Materials:

- **Committee Meeting Materials & Charters:**

Please review the committee updates summary on pg. 15 for a quick recap on recent and upcoming committee activities/topics. Links to recent meeting materials are provided there.

- Q1 2025 RPAC meeting [packet](#), [slides](#) and [notes](#)
- **Charters:** [RPAC](#), [CEAC](#), [RETAC](#), [Coordinating Committees](#)

- **Latest Functional Newsletters:**

- Q1 2025 Newsletter – [Market Research and Evaluation](#)
- Q1 2025 Newsletter – [Emerging Technology](#)
- Q4 2024 Newsletter – [Codes, Standards and New Construction](#)

2025 RPAC MEETING DATES:

QTR	DAY	DATE	TIME (pst)	LOCATION	KEY TOPICS
Q1	Tues	Feb 11	930-12	Virtual	2024 HPWH marketing campaign recap, Market Transformation highlight: TVs
Q2	Thurs	May 22	9-12	NEEA / Hybrid (<i>note – day after EFX</i>)	Portfolio Update, 2025 HPWH marketing campaign proposal
Q3	Wed	Aug 20	HOLD: 9-4	Virtual	HVAC Highlights, inform on gas addition for High-Perf HVAC/VHE DOAS, ELECTIONS: 2025 HPWH campaign
Q4	Mon	Nov 3	HOLD: 9-4	Virtual (<i>maybe hybrid if there's interest & a host</i>)	TBD

Memorandum – *Agenda item (Tier 1)*



May 15, 2025

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Mark Rehley, Director Emerging Technology, Codes and Standards
SUBJECT: Codes and Standards Update

Our Ask of You:

Please bring any questions you have about the status and activities for codes and standards within the region and at the national level.

Brief Overview:

At the May 22, 2025, RPAC Meeting, this topic will cover the status and activities of codes and standards within the region and at the national level. While codes and standards might sound boring, 2025 has been anything but boring. The atmosphere for federal appliances standards has changed significantly, executive orders have resulted in delays to several effective dates and have the potential to impact the appliance standards process in the future. However, codes are in active development in the Northwest and nationally and are making significant progress. NEEA staff are busy keeping up with the changing landscape, and while there have been ups and downs, the work has been impactful and interesting.

Please contact [Mark Rehley, mrehley@neea.org](mailto:mrehley@neea.org) if you have questions about the **Codes and Standards Program**.

Memorandum – *Agenda item (Tier 1)*



May 15, 2025

TO: Regional Portfolio Advisory Committee

FROM: Stephanie Rider, Director of Portfolio Management, Data Strategy and External Reporting

SUBJECT: Portfolio Update

Our Ask of You:

Please review the CEAC memo / detail that follows this page and bring any questions you have about the status and progress with the electric portfolio to the May 22 meeting.

Background

NEEA has recently completed the estimation of energy savings for 2024 and has the final energy savings tally for the full Cycle 6 (2020-2024) for its market transformation portfolio. The purpose of this memo is to provide visibility to the energy savings, related peak MW and carbon savings that we have realized, and expect to realize, in this cycle as well as key highlights across our work in the market.

To that end, the memo that was provided to the Cost Effectiveness and Evaluation Advisory Committee in late April is included (follows this memo) for full detail. The Co-created savings forecast for this cycle did not change materially from the prior reforecast done last year. Market adoption trends continue to show upward trajectory and the current forecast for the cycle remains above the expectations set in the Cycle 6 Business Plan.

We will review this content in the upcoming meeting and have time for any questions on what is provided below.

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Memorandum



April 30, 2025

To: Cost Effectiveness Advisory Committee

From: Ryan Brown, Manager, Planning and Analysis, NEEA

Subject: Electric Annual Report 2024 Value Metrics and Cost Effectiveness

Background

NEEA is an alliance of utilities and energy efficiency organizations that pools resources and shares risks to transform markets toward energy efficiency that benefits consumers in the Northwest. NEEA’s role is to establish technology and market conditions that advance energy efficiency in markets in a sustainable way.

Energy savings are enabled by the alliance’s market transformation efforts in removing market barriers, influencing energy codes and appliance standards, and investment in tools, training, resources, data, and research to support greater efficiency. These market transformation efforts seek to effect long-lasting changes in markets, which then result in energy savings.

NEEA is a dual fuel organization and there is a companion memo to this that outlines the updates for the natural gas portion of NEEA’s portfolio. For more information about NEEA’s savings and cost effectiveness operational guidelines as well as other reference documentation please visit the Portal on NEEA.org (<https://neea.org/portal/savings-reports>).

NEEA Energy Savings Approach

NEEA’s work in the region and in the market is designed to create long-term changes that transform markets to support greater efficiency over the long-term. NEEA aims to manage a portfolio that spans early development of technologies and market transformation opportunities, through program and market development, and finally to the long-term, sustained state of efficiency well beyond NEEA’s direct investment in these markets, such as in a change in an energy code or adoption of a new appliance standard.

NEEA’s tracking and reporting of energy savings is a measure of the resulting benefits of change in the market toward energy efficiency. NEEA employs a lifecycle management framework for each program in the portfolio. The programs listed below that are bolded are included in our regional reporting of savings above market transformation baseline (“**Co-Created Savings**”) for 2024. In all cases, NEEA tracks and reports incremental first year savings on an annual basis to monitor both

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adoption levels and associated energy savings. NEEA tracks savings above both the market transformation baseline and the Power Plan baseline, for various regulatory reporting purposes.

Table 1: Programs in NEEA’s portfolio		
Program Development	Market Development	Previous Investments
Efficient Fans	Heat Pump Water Heaters Luminaire Level Lighting Controls Retail Product Portfolio Extended Motor Products (XMP) - Pumps High-Performance HVAC New Construction: Residential Building Codes New Construction: Commercial Building Codes Products: Federal and State Standards Advanced Heap Pumps	Reduced Wattage Lamp Replacement Efficient Homes Ductless Heat Pumps Strategic Energy Management Manufactured Homes

2024 Savings Results

NEEA estimates and reports the annual energy savings from the NEEA portfolio each year to support the ongoing long-term viability and estimation of the market transformation value as well as to serve as a foundation for funder needs and their local regulatory reporting activities. As with every annual reporting update, NEEA receives and analyzes full year market data as well as new evaluation reports that inform updates to market trends, adoption estimates and unit energy savings estimates or other key assumptions as needed. After incorporating these updates, co-created savings across all investments in NEEA’s portfolio of programs added 43.1 aMW of savings in 2024, more than the amount added in 2023 (Table 2).

Table 2: 2023 Electric Co-Created Savings	2023 Reported	2024 Reported
All Investments (aMW)	38.9	43.1

See [Appendix A](#) for more details about updates and market progress by program.

Net Market Effect savings are also tabulated as part of NEEA’s annual reporting. NEEA staff coordinate with funding partners each year to tally the efficient units that are being tracked and reported at the local level. NEEA does this only to avoid double-counting savings, not to assign attribution to NEEA. This year, NEEA staff aggregated a total of 16 aMW through local programs in the markets NEEA is tracking, resulting in Net Market Effect savings of 27.1 aMW for 2024.

2020-2024 Business Plan Results

It is important to look at a longer time horizon for NEEA’s Market Transformation portfolio. The above figures provide an annual and year-over-year snapshot, but they need to be considered in the context of the market transformation horizon in which NEEA works.

A primary focus for NEEA’s portfolio for the 2020-2024 business cycle (Business Cycle 6) was to ensure continued growth in two programs--Heat Pump Water Heaters (HPWH) and Retail Products Portfolio (RPP)-- and in increasing diversity in the portfolio. NEEA has seen great traction in both programs. RPP is actively influencing many ENERGY STAR specifications, including ENERGY STAR version 9 for Televisions which is expected to be the largest energy saver for the program going forward. HPWH is seeing continued growth in total units and has become a staple measure in new construction in Washington and Oregon in particular. In addition, NEEA facilitated a joint recommendation with industry groups and efficiency advocates that was influential for the U.S. Department of Energy as they established a standard rulemaking in 2024 for water heating that will require HPWH levels of performance for most storage tank electric water heaters starting in 2029.

NEEA is also tracking the continued utilization of the Strategic Energy Management (SEM) program across the utilities in our region. NEEA launched this program in 2010 within the industrial segment and has since transitioned to managing the education platform, known as the SEM Hub, to enable utilities across the region to expand SEM to the many other customers across commercial and industrial spaces. NEEA has tracked over 93 aMW since 2011 on behalf of the region, and the volume of energy savings through SEM increased by over 3 aMW, from 10.6 aMW in 2023 to 13.6 aMW in 2024.

The other primary focus for NEEA’s portfolio in Cycle 6 was to diversify the portfolio composition in terms of sectors addressed, the risk profile of the portfolio and other portfolio metrics. This will aid the development of a long-term portfolio that creates a continuation of energy savings for the region well into the future. During Cycle 6 NEEA made meaningful progress in this regard, advancing the Extended Motor Products: Pumps and Advanced Heat Pump program into Market Development and the Efficient Fans program into Program Development. In 2024, NEEA made a decision to discontinue investment in the High-Performance Windows program due to data access and cost effectiveness challenges. Extra-regional market transformation partners are now working to move this market.

Overall, NEEA is pleased that the forecasted energy and carbon savings for this 2020-2024 business cycle are exceeding the planned expectations as a result of all of our efforts toward sustained efficiency in the region. As seen in Table 3 below, NEEA tracked 147 aMW of co-created savings, 13 aMW of local programs, and 134 aMW of net market effects during this business cycle¹ (2020-2024).

Table 3: 2020-2024 Electric Savings (aMW)	2020-2024 Business Plan Range	Cycle Results¹ (2020-2024)
Savings Category		
Co-Created	115-152	147
Local Programs		13
Net Market Effects		134

Additional Metrics

In addition to tracking and reporting the co-created savings for NEEA’s regional portfolio, NEEA staff also estimates the regional value of a set of additional metrics.

Benefit Cost Assessment

One such metric is the benefit cost assessment of the NEEA portfolio. NEEA’s requirement is to have a portfolio benefit-cost ratio greater than 1. A total of six market transformation programs constitute the portfolio benefit-cost assessment: Retail Products Portfolio, Heat Pump Water Heaters, Manufactured Homes, Luminaire Level Lighting Controls, Extended Motor Products (XMP)- Pumps, and High-Performance HVAC (see table 1 above²). Leveraging data from the Northwest Power and Conservation Council’s (NWPCC) ProCost tool for the 2021 Power Plan, NEEA has assessed the long-term total benefit-cost ratio for the market transformation portfolio at 1.95.

Peak Capacity and Avoided Carbon Emissions

NEEA staff also uses data from the NWPCC to enable the regional reporting for both peak capacity value and avoided carbon emissions. For 2024, the peak capacity value is a regional value assessed on all programs contributing co-created savings (see table 1), for a total benefit to the region of 86 MW of winter peak and 67 MW of summer peak savings (Table 4).

For the estimation of avoided carbon emissions, NEEA includes the benefit from all of the co-created savings of the electric portfolio. The 2024 co-created savings value of 43.1 aMW translates to a total of approximately 200,000 tons of avoided carbon emissions in 2024, at a monetized value of \$14.2 million³.

	Avoided Carbon Emissions (tons)	Winter Peak Savings (MW)	Summer Peak Savings (MW)
2024	200,000	86	67
2020-2024 Total	859,000	402	304

Appendix A: 2024 Portfolio Highlights

NEEA works with all parts of the market to enable efficient technology choices for consumers: gathering and analyzing data to inform both regional power planning and utility programs, leveraging its relationships with mid and upstream market actors like manufactures and retailers, and improving how products are tested and perform in real life applications. This work brings more efficient products and options to the market, which are made available to consumers and business across the Northwest through their local utilities. The sections below highlight that work for 2024.

Consumer Products

NEEA works with extra-regional program administrators and national retailers to utilize midstream incentives that signal energy efficient options in the supply chain while gaining access to full-

category sales data. The incentives encourage manufacturers and retailers to build, purchase, stock and promote high-efficiency products. Products include white goods, air cleaners, televisions and other home electronics. The data retailers provide allows NEEA to identify the most promising affordable energy efficiency opportunities and gain insights that improve energy test procedures, helping consumers distinguish between products. The program saw momentum for both laundry and television products in 2024.

- **Laundry:** The sales volume of residential laundry centers⁴ has increased by 62% from 2023 to 2024 (41,000 regional sales in 2024), driven in large part by products that incorporate a heat pump dryer which make up 30% of the laundry center sales in 2024. NEEA influenced advancement of heat pump drying technology as part of its Super-Efficient Dryers program dating back to 2012. Additionally, the market share for ENERGY STAR dryers in the standalone market rose from approximately 45% to 47%. This change indicates an upward trend in market share growth for ENERGY STAR dryers.
- **Televisions:** NEEA is continuing to expand its data pipeline to effectively track the market adoption of ENERGY STAR version 9 televisions—a specification developed by NEEA and its partners. Using product test data that was recently published in the California Energy Commission’s Appliance Efficiency Database and sales data NEEA purchases for the Northwest region, the Retail Products Portfolio program can estimate that as much as 26% of the sales meet the ENERGY STAR criteria. NEEA’s Retail Products Portfolio is now adding televisions to its midstream program to increase certification levels and gather more market intelligence.

Water Heating

NEEA influenced early adoption of heat pump water heaters in the Northwest by promoting awareness of the product’s benefits and building a strong foundation in the Northwest.⁵ In May 2024, the Department of Energy published a final rule mandating a shift for most electric storage water heaters to heat pump technology by 2029. NEEA’s ongoing engagement is crucial for addressing market barriers and preparing the region to adopt and benefit from the recently adopted federal standard. NEEA is supporting the Northwest market by working to strengthen the workforce and engage both regionally and nationally to identify solutions to increase adoption of these water heaters across the region, with particular focus on areas with slower adoption rates.

Space Heating

NEEA has been working in the residential space-heating market since the early 2000s, starting with ductless heat pumps and now moving toward advanced heat pumps. The Ductless Heat Pumps program accelerated market acceptance and adoption of inverter-driven ductless heat pumps in electrically heated homes through establishing relationships with manufacturers, distributors, and retailers to enhance product design and availability. NEEA is now leveraging these relations to work on a set of low- and no-cost improvements that meaningfully increase installed heat pump system efficiency. In 2024, NEEA focused on building the market's awareness and capacity for competitively differentiating these advanced heat pump improvements, with efforts on several fronts.

NEEA's leadership and participation in 2024 contributed to updated specifications adopted into: 1) to the Consortium for Energy Efficiency Residential Electric HVAC Specification, 2) ENERGY STAR Product Specification v.6.2 for Central Air Conditioners and Heat Pump Equipment, and 3) the U.S. Department of Energy (DOE) amendment to the Federal test procedure for central air conditioners and heat pumps.

NEEA's new Advanced Heat Pump program's Low Load Efficiency (LLE) laboratory research study was concluded, with six units tested in UL labs over the summer of 2024, followed by a physical "tear down" of units to help identify the mechanical source of LLE savings. These efforts actively engaged a broad spectrum of manufacturers, with the project receiving donated heat pumps from several manufacturers, along with manufacturer staff time to commission products on site. To fully leverage recent studies, NEEA has initiated updated field and lab data analysis and energy modeling to refine estimates of savings rates for advanced heat pump improvements. A Request for Proposals was launched in 2024 for this effort.

In December, NEEA kicked off a new collaboration of technical experts, two national laboratories and manufacturers to build consensus on a new heat pump connected commissioning specification. NEEA expects to report savings from this program in 2025/2026.

Commercial Lighting

NEEA engages commercial lighting manufacturers and their supply chain to enhance promotion and luminaire level lighting controls sales in the Northwest. In 2024, NEEA added a manufacturer to the program that serves Montana and Idaho territories. Including these sales made a significant difference to total observed sales. NEEA works with manufacturers by partnering with manufacturer representatives to educate lighting specifiers, lighting engineers and installers the capabilities and value of luminaire level lighting controls. Recently, NEEA influenced the Illuminating Engineering Society's Lighting Practice committee to add these controls to its Recommended Practice standards. Many lighting designers and building managers reference this standard when making lighting decisions.

New Construction

NEEA's efforts support and encourage innovation within the supply chain and inform voluntary specifications and codes ensuring that consumers and building owners have choices/options for products that are proven to perform well and save energy. In 2024, NEEA started a code compliance evaluation to assesses current building practices including measure compliance and space and water heating fuel selection in residential new construction. The results of the analysis are informing program design and energy consumption analysis NEEA is conducting for the *2023 Oregon Residential Specialty Code*.

Emerging Technology

NEEA aggregates and leverages the power of the region, creating economies of scale to identify and vet emerging technologies, bringing forward new products that are proven to perform well and save energy. Two major products saw ENERGY STAR specification changes in 2024: Air Source Heat Pumps and Room Air Conditioners. NEEA provided support and suggestions for ENERGY STAR

to amend the Air Source Heat Pump specification, increasing the performance stringency to achieve ENERGY STAR Most Efficient performance levels, which went into effect on December 4. NEEA also provided feedback to ENERGY STAR in developing a test method for room air conditioners with heat pump heating modes. This update went into effect in November and more accurately captures the energy efficiency benefits of the emerging category of room heat pumps. Additionally, ENERGY STAR began revisions of the Residential Clothes Dryer Specification, in which NEEA provided substantial feedback and data from its numerous laundry efforts, including heat pump dryer testing, field laundry research, and laundry pair testing. Increasing the availability of high-performing efficient technologies in the market gives customers more and better options when it comes to the products and technologies they can purchase.

Building Stock Assessments

NEEA has five regional studies that hit milestones in 2024. The 2022 Residential Building Stock Assessment was completed, and the study's final report and datasets were posted to [neea.org](https://www.neea.org). The design phase of the 2025 Commercial Building Stock Assessment finished and the study began collecting data through commercial building site visits. The Home Energy Metering Study and Commercial Energy Metering Studies both completed their metering installations and continue to capture metering data on hundreds of buildings. Last, NEEA began designing a new study on motor-driven system characteristics named the 2027 Motor-Systems Stock Assessment.

Market Data and Research

NEEA's Market Research and Evaluation team managed nearly 40 third-party research and evaluation studies to support alliance Market Transformation programs. Seven program market progress evaluations launched or concluded in 2024, including Manufactured Homes, Retail Product Portfolio, Extended Motor Products, Commercial and Residential Building Codes, Luminaire Level Lighting Controls, and two Commercial HVAC programs. These mixed method, longitudinal evaluations are instrumental to understanding the market opportunity for these measures, as well as for tracking NEEA's progress toward its Market Transformation goals. These evaluations together with several market research studies exploring emerging market transformation program themes including consumer use and attitudes toward connected consumer products and the market for agricultural pumps, can deliver high-value and actionable market intelligence for stakeholders going forward.

Memorandum – *Agenda item (Tier 1)*



May 15, 2025

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Britt Cutsforth Dawkins, Manager, Program Marketing Strategy
SUBJECT: Proposed 2025 Heat Pump Water Heater *Level Up* Campaign

Our Ask of You:

Review the summary information below and join the RPAC/RPAC+ meeting on May 22 to hear the details of this proposed HPWH campaign.

Background/Context:

The *Level Up* campaign creative was developed and vetted closely with the RPAC+ group in 2024. It ran the same year to 1) continue to raise consumer awareness and 2) increase consideration of HPWHs across the region. The 2024 campaign was a success, resulting in more than 24 million impressions across the target audience and more than 140,000 site sessions to the *Level Up* campaign landing page. Given the impact of the 2024 campaign, NEEA staff proposes running it again in 2025.

The proposed 2025 *Level Up* campaign will be presented during the May 22 RPAC/RPAC+ meeting. Following the Q2 RPAC meeting, RPAC members will have the opportunity to review the 2025 campaign details with NEEA in a one-on-one setting (as requested) and ask questions so they are informed to make their elections—i.e., participate, self-deliver the campaign, or choose to exempt their utility from it—at the Q3 2025 RPAC meeting on August 20.

Campaign Overview:

NEEA staff recommends re-running last year’s region-wide *Level Up* campaign in 2025. The campaign awareness and consideration strategies remain the same as in 2024, but slight tweaks are recommended to improve engagement, including testing new messaging, expanding the campaign’s reach with a new marketing channel and Spanish-language ads, and optimizing the landing page.

The popular 8-bit gaming creative, broad Northwest targeting, campaign duration, and media spend also remain the same as in last year’s campaign. The proposed timing for this year’s *Level Up* campaign is Q3 and Q4 2025.

Please join the RPAC/RPAC+ presentation on May 22 and contact Britt Cutsforth Dawkins at bdawkins@neea.org if you have questions about proposed 2025 HPWH campaign.

To see the summary of the 2024 campaign results, please review the Q1 2025 RPAC memo [here](#).

Memorandum – Informational Item (Tier 1)



May 15, 2025

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Steve Seminario, Market Transformation Manager, Consumer Products
SUBJECT: Regional Online Marketplace Update

Our Ask of You:

Please review the update below and contact us with any questions.

Brief Summary of Program Update

NEEA is running a technology scanning project to build and evaluate a regional online marketplace intended to help Northwest residents to easily find and purchase more energy efficient products. This is the third update on this project (previous updates provided [Q4 2024](#) and [Q1 2025](#) to RPAC and the Residential Coordinating Committee).

Since our Q1 update, NEEA continues to drive site visitor traffic using Enervee’s search engine marketing efforts directed at zip codes in Energy Trust and Clark Public Utilities service areas, targeting refrigerator and television shoppers. In order to increase visitor engagement on the site, NEEA narrowed the search marketing focus, increased visibility of retailer product offers and improved the site user experience for visitors using mobile devices. These actions resulted in significantly higher numbers of clicks to retail product offers and a much higher instance of users visiting multiple product categories.

Working in cooperation with alliance utilities and Enervee, NEEA is evaluating potential directions for the Northwest Marketplace that could take it beyond this technology scanning project and meet the goal of increasing the energy efficiency of consumer product purchases across the region. NEEA will weigh these options in the second half of 2025, with the original technology scanning project running at least through October 2025.

Progress updates will continue via informational packet memos to both RPAC and the Residential Coordinating Committee (RCC). Please share with others in your organization as needed, including your marketing/communications leads, and let NEEA staff know if you’d like more information or have questions about the project. Committee members can anticipate a summary of learnings sometime in the Q3-Q4 timeframe, to include an outline of next steps around a more formalized pilot.

Please contact Steve Seminario sseminario@neea.org if you have questions about the Regional Online Marketplace.

Memorandum – *Informational (Tier 2)*



May 15, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Debbie Driscoll, Principal Market Transformation Manager, NEEA
Masumi Izawa, Market Research Project Manager, BPA

SUBJECT: New HVAC Sales Insights Regional Data Report Now Available

Our Ask of You:

Share the newly released 2023 HVAC Sales Insights Summary and Aggregated Data Spreadsheet with appropriate members of your team. Encourage staff to utilize the data to inform programs and planning. Reach out with any data reporting requests.

Brief Overview:

In 2016, NEEA and BPA began partnering to collect and analyze full category residential and commercial HVAC sales data in the four-state region (ID, MT, OR, and WA). The data is currently used for NEEA’s benefit cost models, BPA’s residential HVAC market model, RTF measure development, power planning, market opportunity and strategy development, and regional investment decisions.

BPA and Resource Innovations (the research team) recently completed their analysis of the 2022-2023 sales data, including sales trends for ductless heat pumps, ducted air source heat pumps (with sub-analysis of variable speed heat pumps), gas furnaces, and air conditioning, including insights on window units from NEEA’s Retail Product Portfolio data. For 2022-2023, the team received data from 16 suppliers, representing approximately 30-80 percent of residential-scale HVAC sales in our region, depending on the product category.

A summary report highlighting trends, along with the aggregated data spreadsheet are available on BPA’s HVAC Research website:

- **2022-2023 HVAC Sales Insights:** <https://www.bpa.gov/-/media/Aep/energy-efficiency/momentum-savings/2022-2023-hvac-sales-insights.pdf>
- **2022-2023 HVAC Sales Data:** <https://www.bpa.gov/-/media/Aep/energy-efficiency/momentum-savings/2022-2023-hvac-sales-data.xlsx>

If you have questions about this research or report, please contact Debbie Driscoll ddriscoll@neea.org.

Memorandum – Informational (Tier 2)



May 15, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Anouksha Gardner, Stakeholder Relations Manager (Coordinating Committees)
Eric Olson, Sr. Product Manager, Product Management (RETAC)
Jonathan Belais, Policy Manager (CEAC)

SUBJECT: Update on recent committee meetings (Q1/Q2 2025)

Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the upcoming RPAC meeting, or contact NEEA staff listed below.

Reminder: Effective 2025, the Integrated Systems Coordinating Committee is renamed to the Commercial & Industrial Coordinating Committee (CICC) and the Products Coordinating Committee renamed the Residential Coordinating Committee (RCC). The coordinating committees will skip the Q3 meeting and only meet three times a year.

Commercial & Industrial Coordinating Committee (CICC):

The CICC uses an annual planning process to co-create high-priority regional topics for the following NEEA programs (commercial & industrial focus): Luminaire Level Lighting Controls (LLLC), High-Performance HVAC, Extended Motor Products (XMP) Pumps & Circulators, Efficient Fans, and Better Bricks. This year's co-created regional priority topics are listed in the [CICC 2025 Workplan](#).

In the Q1 2025 (February 26 & 27), hybrid CICC meeting the committee focused on the following topics, which were identified by committee members as a regional priority for 2024: *High Performance HVAC Program's Inform on key activities identified in NEEA's Market Engagement Plan* presented by NEEA's Sr. Program Manager Dave Hammond and a regional roundtable share-out on organizational and programmatic updates. During day 2 of the Q1 meeting, Committee members participated in a collaborative presentation on *Extended Motor Products Pumps topic Utility Custom Projects for Pump Energy Efficiency* presented by NEEA's Sr. Program Manager Warren Fish and Committee Members from Avista and Puget Sound Energy. To see what transpired in Q1 at CICC, please see [agenda packet](#), slides [day 1](#) & [day 2](#), and [notes](#) for details. In the Q2 2025 (May 13) meeting, the CICC will focus on the regional priority topic: *Efficient Fans Program Updates*. Committee members and NEEA program managers will also share out on current program highlights and other organizational updates. The Q2 meeting will be virtual.

Please contact [Stephanie Quinn](#) or [Anouksha Gardner](#) with questions about the CICC.

Residential Coordinating Committee (RCC):

Like the CICC, the RCC uses an annual planning process to co-create high-priority regional topics for the following NEEA programs (residential focus): Heat Pump Water Heaters (HPWH), Consumer Products/Retail Product Portfolio (RPP), and Advanced Heat Pumps (Advanced HP). This year's co-created regional priority topics are listed in the [RCC 2025 Workplan](#).

In the Q1 2025 (March 18 & 19) hybrid meeting, the RCC focused on a discussion between committee members and presentation from *NEEA Manager I, Program Management Suzi Asmus and Sr. Product Manager Christopher Dymond on Advanced Heat Pumps Cold Climate /Peak Management and addressing backup heating management*, along with committee members and NEEA Program Managers sharing out on latest program highlights and other organizational updates. In Day 2, committee members engaged in a *utility roundtable discussion on Heat Pump Water Heater Utility Program Strategies for 2025* and received an update on the *Hot Water Innovation Prize by NEEA Manager I, Program Management Emily Rosenbloom*. To see what transpired in Q1 at RCC, please see [agenda packet](#), slides [day 1 and day 2](#), and [notes](#) for detail. In the Q2 2025 (June 26) meeting, the RCC will cover a *Heat Pump Water Heater Product Review discussion*. Committee members and NEEA program managers will also share out on current program highlights and other organizational updates. The Q2 meeting will be virtual.

Please contact [Stephanie Quinn](#) or [Anouksha Gardner](#) with questions about the RCC.

Regional Emerging Technology Advisory Committee (RETAC)

At the Q1 RETAC meeting, Ryan Kerr from GTI Energy (GTI) provided an overview of their capabilities and updates on several ongoing research projects. A selection of GTI's current research includes using digital scans of a building and then using machine learning to identify air infiltration areas; integrated panelized retrofits with R30 wall panels for multifamily deep energy retrofits; community-supported affordable geothermal energy systems; and dual fuel products and decision tools.

Multiple RETAC participants also provided updates on their research efforts. Bonneville Power Administration, EPRI, Energy Trust of Oregon, PNNL, and the Center for Energy and Efficiency provided updates. Details are available on [page 4](#) of the RETAC meeting notes.

Next, Kevin Smith from the Northwest Power and Conservation Council provided an update on the development of the 9th Power Plan and schedule. At the time of the RETAC meeting, the Council sought feedback on multiple measures across the agriculture, commercial, and industrial sectors.

Finally, NEEA staff gave a debrief from the AHR Expo and ASHRAE conference, including meeting with a dozen heat pump water heater manufacturers, 15 residential HVAC manufacturers, and 15 commercial HVAC manufacturers, multiple commercial water heating companies, along with participation in various ASHRAE committees. The Advanced Heat Pump Coalition, whose members include NEEA, NEEP, NRCAN, Southern California Edison, NYSEDA, TRC, Evergreen, the Minnesota Center for Efficiency and the Environment, and the Consortium for Energy Efficiency, also connected in person.

Resources / reference:

- Meeting notes are available [here](#). The slide deck is available [here](#).
- To view the Product Council schedule and recordings of previous meetings or to submit requests for product councils, visit [neea.org](#).
- The Q2 RETAC meeting is scheduled for June 18.

Please contact [Eric Olson](#) or [Alisyn Maggiora](#) with any questions about RETAC.

Cost-Effectiveness & Evaluation Advisory Committee (CEAC)

During the Q1 meeting on March 6, 2025, NEEA staff reviewed key assumption updates, provided updates on market research and evaluation activities. Staff also provided an update on the in-progress state code baseline review and recently published Market Progress Evaluation Report (MPER) for Extended Motor Products. During

the Q2 meeting on April 30 and May 1, 2025, NEEA staff began with an overview of NEEA's market transformation framework, savings, and costs and benefits as context for annual reporting discussions. Day two included a review of preliminary findings from the state codes baseline and key assumption review, overviews of changes to key assumptions, and an overview of annual metrics and key market stories from NEEA's 2024 market transformation efforts. The next meeting (Q3) is scheduled for August 27, 2025.

Recent meeting materials linked below:

- Q1 2025 Cost Effectiveness and Evaluation Advisory Committee [packet](#)
- Q2 2025 Cost Effectiveness and Evaluation Advisory Committee [packet](#)

Please contact [Stephanie Rider](#) or [Jonathan Belais](#) if you have questions about CEAC.

Market Progress Quarterly Report

Residential

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Residential Products Portfolio
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Heat Pump Water Heaters
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Efficient Fans
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Advanced Heat Pumps

Commercial and Industrial

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Efficient Rooftop Units
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Advanced Commercial Gas Water Heating
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Luminaire Level Lighting Controls

Infrastructure

- 
BetterBricks



Questions about this report may be addressed to:
Emily Moore, Director of Portfolio, Market Development & Transformation
EMoore@neea.org

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal		
Retail Products Portfolio (RPP)	Anne Brink	Electric	Leverage midstream incentives to influence retail stocking practices, ultimately driving manufacturing and standards for a portfolio of energy efficient products sold through the retail channel.		
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment	
Advance television savings opportunity by growing ENERGY STAR v 9.1 market share, continuing to monitor the voluntary agreement and ensuring the TV test procedure is augmented as needed.	Implement a national incentive program with other ESRPP program sponsors.	Implement a regional program to support ENERGY STAR TVs.	On target	The team secured Costco as an additional TV retailer and televisions are now a part of the national ESRPP program. NEEA is offering incentives on ENERGY STAR televisions. The Best Buy ad campaign continued through the first 2 weeks in March. Results of the ad campaign to date show that 9.2% of those landing on a page with the ENERGY STAR television ad are purchasing ENERGY STAR televisions. This is three times higher than the estimated regional market share of ENERGY STAR TV's which is at 3% demonstrating the success of advertising ENERGY STAR.	
Advance refrigerator savings opportunity by supporting energy-efficient technologies, leveraging data for future comments on test procedures and ENERGY STAR specifications.	Ensure final draft of ENERGY STAR specifications includes key NEEA recommendations.	Provide data and comments for ENERGY STAR refrigerator specifications.	Heads up	Advancing ENERGY STAR refrigerator specifications is now on hold due to the new federal administration. The team is reevaluating strategies to advance refrigerator savings.	
Advance laundry savings opportunity by leveraging data for future comments on test procedures and ENERGY STAR specifications.	Ensure draft of ENERGY STAR specifications includes key NEEA recommendations.	Provide data and comments for clothes washer ENERGY STAR specifications.	Heads up	Currently the EPA has suspended moving ENERGY STAR specifications forward due to the new federal administration. The team will reevaluate laundry strategies and will focus near term activities on refrigerators and televisions.	
Grow and strengthen ESRPP program through sponsor evaluation support, targeted recruitment and retention activities.	Begin implementing activities identified in the evaluation support plan by Q3.	Draft plan for ESRPP evaluation support by Q2.	On target	The team has hired a contractor and has scheduled an initial meeting with ESRPP sponsors to identify opportunities to support sponsors with their evaluations of the program.	

Consumer Products Product Group

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal
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Water Heating Product Group	Heat Pump Water Heaters (HPWHs)	Emily Rosenbloom	Electric	Influence passage of a federal standard for all electric storage tanks > 45 gallons by 2025.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
	Increase confidence and technical capability of HPWH installers in the Northwest for single family and low-rise family applications	Increase number of installation companies listed on Hot Water Solutions by 25%.	Increase number of installation companies listed on Hot Water Solutions by 15%.	Heads up	The program is on track to meet the threshold for this goal. In the first quarter, four installers were added to the Hot Water Solutions (HWS) installer finder, representing Washington, Oregon, and Montana. In late February, Hot Water Solutions hosted counter days at three distributor branches in the Boise area to recruit installers to participate in Hot Water Solutions. Many good connections were made. Installers were curious about the technology and interested in educational opportunities. Follow-up with these contractors will continue through Q2 and should result in additional installers listed from Idaho, which is currently underrepresented on the installer finder.
	Leverage national and extra regional partnerships to increase consistent adoption of HPWHs nationally to ensure market readiness for the 2029 federal standard.	Strengthen strategic relationships with five national or extra regional organizations.	Strengthen strategic relationships with two national or extra regional organizations.	On target	We have organized a quarterly check-in with other Regional Energy Efficiency Organizations (REEOs). The REEOs in attendance include the Southeast Energy Efficiency Alliance (SEEA), Northeast Energy Efficiency Partnership (NEEP), and South-central Partnership for Energy Efficiency as a Resource (SPEER). Our objectives for these quarterly check-ins are to share best practices, resources, and learn how NEEA might better support adoption nationally. We identified the REEOs as key organizations to connect with as we build out our national engagement strategy due to their extensive geographic reach, aligned mission, and understanding of their region's unique barriers and opportunities for influence. We will identify additional organizations in Q2.
Increase customer awareness and demand among populations with low adoption.	Identify two low adoption populations in the Northwest and document baseline, barriers and opportunities.	Identify one low adoption population in the Northwest and document baseline, barriers and opportunities.	On target	This work will begin in Q2. The program will use existing data to identify baseline trends in adoption for the following: site-specific installation location, geographical region and consumer demographics.	

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal
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Motors Product Group	Efficient Fans	Alexis Muench	Electric	Develop program to accelerate the adoption of efficient fans and fan system components.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
	Gather data and insights from market actors to inform program messaging and education activities	Data/message testing completed with 3–4 new partners and results analyzed by end of Q4 2025	Data/message testing completed with 2 new partners by end of Q4 2025	On target	The program team has secured data and/or new partnership commitments from 2 manufacturers or manufacturer reps to inform and provide feedback on market activities. Outreach is actively underway with 2 additional potential partners to meet or exceed our target for broader market insight.
	Conduct research to understand fan purchasing and decision-making process between supply chain and market actors	Research completed and key findings disseminated internally by end of Q3 2025	Research completed and key findings disseminated internally by end of Q4 2025	On target	The program team began a study in Q1 to better understand purchasing dynamics for standalone fans—focusing on key market actors, decision-making relationships, pain points, and feedback on program language. The study is on track for completion in Q3.
	Conduct research to identify potential technical barriers to refine market transformation interventions and determine efficient fan product availability	Preliminary technical barriers identified and completed report by Q3 2025.	Preliminary technical barriers identified and completed report by Q4 2025.	On target	Initial technical barriers to market transformation and efficient fan product availability have been identified. We remain on track to deliver findings within the targeted timeframe.
Assess data quality, create, and 3rd party review Efficient Baseline	Final baseline drafted and submitted for 3rd party review by end of Q3 2025	Final baseline drafted and submitted for 3rd party review by end of Q4 2025	On target	The program team is on track to complete the Efficient Baseline development in Q2. This keeps us aligned with the target timeline and supports momentum toward finalizing the baseline by Q3 or Q4.	

Residential

Residential					
Initiative Name	Manager	Fuel Type	Initiative Goal		
Advanced Heat Pumps	Suzi Asmus	Electric	Develop program to lock in heat pump efficiency that is 30 percent more efficient than current standards via a series of improvements to the federal test procedure and minimum standard, driving transition from all electric heating to VSHP across all applications and optimizing performance with connected controls.		
HVAC Product Group	2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
	Increase support from regional and national partners for inclusion of NEEA's priority heat pump improvements in specifications, qualified products lists, product development, and standards reporting.	Facilitate adoption of at least one improvement by two or more target partners, such as in CEE, EPA and RTF, in specifications, manufacturers in product positioning, and in utility or efficiency programs.	Facilitate adoption of at least one improvement by one or more target partners.	On target	Nine heat pump manufacturers are participating in NEEA-led working group to develop a connected commissioning specification to improve verification of proper heat pump system installation and commissioning. Participation of manufacturers increases likelihood of their adoption and implementation of the final specification.
	Refine savings rate confidence and metrics that can be used for NEEA savings tracking and to convey value proposition to the market.	Complete field data analysis with final report and future field study defined.	Complete field data analysis.	On target	NEEA awarded contract in January for modeling and data analysis. Currently expecting to meet 2025 Target.
	Establish clear, consistent priority heat pump improvement messaging and value propositions for program partners and target audiences.	Publish program communications resources for at least five improvements on BetterBuiltNW.com.	Develop program communications resources for at least three improvements.	On target	Launched work with Marketing and Communications contractor to develop messaging resources. Currently on track to meet Target.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
High-Performance HVAC / Very High Efficiency Dedicated Outside Air Systems (VHE DOAS)		Dave Hammond	Electric	Accelerate the adoption of high efficiency HVAC systems and components, and support commercial code advancement that requires the very high efficiency DOAS approach or equivalent efficiency by 2035.	
2025 Operations Plan Milestones		Target	Threshold	Status as of 5/14/2025	Comment
HVAC Product Group	Promote system approach and highlight value proposition (including non-energy benefits) throughout the supply chain.	Complete at least 10 awareness or educational efforts that target supply chain audiences.	Complete at least seven awareness or educational efforts to target supply chain audiences.	On target	Program completed 4 educational efforts during Q1, including sharing program resources at the American Society of Plumbing Engineers (ASPE) & American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) product show in Seattle, WA, (2) VHE DOAS-focused presentations at the ASHRAE Winter Conference in Orlando, and a manufacturer rep product tour throughout Spokane, WA promoting VHE DOAS-compliant HRVs. The HP HVAC program is on track to complete at least 10 awareness or educational efforts throughout 2025.
	Increase availability of lower cost qualifying E/HRVs.	Work with manufacturers to release at least two new capacities or two new price points.	Work with manufacturers to release at least one new capacity or one new price point.	On target	The HP HVAC program added 53 new products and one new manufacturer to the compliant products list in Q1, with even more anticipated later in 2025. The program is pursuing pricing information to determine if any of these added models come at a new price point. Based strictly on the volume of new models anticipated in 2025, the program is cautiously optimistic 1-2 new price points will be achieved by end of year.
	Build support for NEEA's proposed code changes.	Ensure key elements of NEEA's code change proposal are incorporated in the draft code language published by ASHRAE 90.12025 and/or 2027 IECC.	Code development committee voting margins for NEEA's proposal are closer to approval than for the analogous 2024 IECC proposal.	Heads up	HP HVAC team submitted a code change proposal for 2027 IECC to require DOAS for some commercial building types. This proposal was recommended for disapproval by the commercial HVAC subgroup by a vote of 6-3 (with 2 abstentions) but has not yet been voted on by the main consensus committee as of 5/5/25. While it is unlikely the proposed language will be incorporated into the draft code, the threshold for this goal was met. The HVAC subcommittee vote for the analogous 2024* IECC proposal was 0-14 (with 4 abstentions). *Threshold in the Operations Plan incorrectly stated that NEEA originally submitted a proposal for the 2021 IECC cycle. The initial proposal was for the 2024 IECC cycle. The most recent proposal was for the 2027 IECC cycle.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Efficient Rooftop Units (Efficient RTUs)	Jason Jones	Gas	Increase the efficiency of rooftop units through product differentiation and ultimately an updated federal standard by 2034 that requires at least 20 percent more efficient RTUs than the 2020 market average.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Encourage manufacturers to develop and promote efficient RTUs for the light commercial market.	Work with a minimum of four manufacturers to develop new eligible equipment, two new price points, or two expanded product lines that serve the light commercial market.	Work with a minimum of two manufacturers to develop new eligible equipment, or one new price point, or one expanded product line that serves the light commercial market.	On target	Greenheck is bringing an RTU line to market in late 2025/early 2026 which will incorporate better cabinet insulation and ERV options. The team met with HVAC manufacturers at the AHR Expo. Of note, 3 additional manufacturers are offering/exploring additional products that would contribute as progress to this goal, including Lennox, JCI/York, and KCC (Trane).
Create partnerships and support for efficient RTUs among market actors (manufacturers, manufacturer representatives, distributors, contractors) and utilities across the US and Canada.	Recruit six manufacturers/ distributors/ manufacturer representatives to partner and submit data showing efficient RTU sales by Q2 2025.	Recruit four manufacturers/ distributors/ manufacturer representatives to partner and submit data showing efficient RTU sales by Q4 2025.	Heads up	Regular meetings with distributors and manufacturer reps are ongoing. One manufacturers rep has committed to supply 2024 RTU sales data. Team is working on formalizing the data request. Outreach and Incentive Implementation vendor is providing increased supply chain engagement and is beginning to see more local interest.
Ensure a clear, cohesive set of value propositions for efficient RTUs throughout the supply chain.	Develop eight new marketing assets (trainings, flyers, case studies, etc.) by Q3 2025.	Develop six new marketing assets (trainings, flyers, case studies, etc.) by Q4 2025.	On target	Marketing team created a case study for the KBOO radio station project. Case study is posted on BetterBricks. Program team is working with the High-Performance HVAC team to design a new BetterBricks landing page to direct contractors and building owners to NEEA's options for commercial HVAC. Marketing Plan for remainder of 2025 is being finalized and includes plans for additional assets.

HVAC Product Group

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Luminaire Level Lighting Controls (LLLC)	Anne Curran	Electric	Develop best practice specifications for luminaire level lighting controls, aiming to have the technology adopted as standard industry practice.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Bolster demand of LLLC products and increase decision-maker acceptance of the LLLC value proposition.	Feature four new LLLC success stories in earned media or at professional association events.	Feature three new LLLC success stories in earned media or at professional association events.	On target	The program team is in discussions with multiple market actors, with three success stories in progress, and expects meet the target of four by end of year.
Strengthen focus and promotion of LLLC by key manufacturer sales channels to motivate more sales professionals to champion LLLC to their customers.	Collaborate with 32 local manufacturer representatives to feature LLLC in strategic meetings or events targeting specifiers, of which 25% (8) will be representatives who have not previously featured LLLC.	Collaborate with 28 local manufacturer representatives to feature LLLC in strategic meetings or events targeting specifiers, of which 25% (7) will be representatives who have not previously featured LLLC.	On target	The program is off to a strong start in its collaboration with local manufacturer representatives, with activities completed with 10 manufacturer representatives. In a sign of broadening market interest in LLLC, 7 of these 10 had not previously collaborated with the program.
Influence leading lighting designers, engineers and installers to include LLLC in their ongoing business practices	Collaborate with eight lighting designers, engineers, or installers, of which at least 50% (4) have not previously partnered with the program, on media content, events, or educational activities.	Collaborate with six lighting designers, engineers, or installers, of which at least 50% (3) have not previously partnered with the program, on media content, events, or educational activities.	On target	With its collaboration in Q1 with 2 influential market actors (1 of which had not previously partnered with the program), the program is on track in its targeted collaborations with lighting designers, engineers, and installers.

Lighting Product Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Luminaire Level Lighting Controls (LLLC)	Anne Curran	Electric	Develop best practice specifications for luminaire level lighting controls, aiming to have the technology adopted as standard industry practice.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Increase visibility and demand for LLLC through strategic national engagements to build scale	Strengthen strategic alignment with four national or extra-regional partner organizations.	Strengthen strategic alignment with three national or extra-regional partner organizations.	On target	The program continues to engage national stakeholders to stay aligned on LLLC efforts and increase visibility for LLLC. In Q1, the program deepened its relationship with Center for Energy and Environment through detailed working sessions on marketing and education activities. The program also collaborated with Pacific Northwest National Laboratories on data collection from the NEEA office LLLC installation in order to analyze real world data and develop additional findings from "living labs" for Department of Energy's Next Generation Lighting Systems initiative.

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Extended Motors Products (XMP)	Warren Fish	Electric	Working midstream with distributors and manufacturers, drive awareness, stocking and sales of highly efficient pumps and circulators, and influence Federal standards over time.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Motivate participating manufacturer representative firms to preferentially stock and increase sales of smart pumps and smart circulators.	Reach market share of 23% for smart pumps and smart circulators among manufacturer representative firms participating for more than one year	Reach market share of 18% for smart pumps and smart circulators among manufacturer representative firms participating for more than one year	Heads up	Smart pump penetration levels reached 15% and smart circulators reached 22% in Q1 2025, both below goal target levels. Increased smart pump marketing and seasonal trends suggest we will see improved performance through the year; however, supply chain issues and elevated interest rates introduce some uncertainties that the team will continue to monitor.
Raise awareness of the value of efficient pump products, the use of the ER label and smart pumps.	Complete 30+ high-impact awareness building activities, including: smart pump education events, case studies, or "Industry Voices" videos published on BetterBricks.	Complete 15+ high-impact awareness building activities.	On target	In Q1, the program completed five high-impact awareness building activities, including three lunch and learns with target audiences. With a busy schedule of events and new content planned for the summer and fall, the program is on track to meet the target of 30+ for the year.
Accelerate program participation by growing the number of participating manufacturer representative firms, and by expanding the program scope into additional markets.	Increase participation of firms to 11 participants.	Increase participation of firms to nine participants.	On target	In Q1, the program added two new participants, bringing the total to 10. The new contracts are fully executed and we have received Q1 2025 data submissions from both new participants. The program team is recruiting for an 11th participant now and should have one on board in Q3 or Q4.

Motors Product Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Advanced Commercial Gas Water Heating	Deborah Sunada	Gas	The program will transform the commercial and multifamily water heating retrofit and new construction market to increase the adoption of gas heat pump (GHP) water heating systems, resulting in reduced gas consumption and carbon emissions in these sectors.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Engage with manufacturers to understand their go-to-market strategies and support midstream training initiatives.	Engage three gas heat pump manufacturers and three electric heat pump manufacturers to support the development of midstream training initiatives.	Engage one gas heat pump manufacturer and one electric heat pump manufacturer to support the development of midstream training initiatives	On target	Program is on target, with continued engagement of three gas heat pump manufacturers (Robur, Vicot, and SMTI) and an expansion of engagement to electric heat pump manufacturers (prioritizing Mitsubishi, SANCO2, and Nyle). Please note, the provided "Operations Plan Milestone" is a proposed revision to what was listed in the 2025 Operations Plan. For reference, the goal listed in the 2025 Operations Plan was "Engage with manufacturers to influence product design, understand their go-to-market strategies, marketing, and promotion plans, certify and support products, and support midstream training initiatives." Language was revised to more accurately reflect program focus, as relevant technology is past the developmental phase and is beginning commercialization.
Execute and monitor field demonstrations to validate performance and savings, target market, challenges, and inform training opportunities.	Initiate one gas heat pump field demonstration and one dual fuel demonstration.	Initiate one dual fuel demonstration.	On target	Program is on target with this goal, as a dual fuel demonstration site has been identified and project is moving forward, with baseline metering taking place in Q2. The program team met with decision makers for a viable gas heat pump field demonstration lead and a site visit is scheduled for early Q2.
Model and lab test gas heat pump technology and dual fuel configurations to further inform value proposition and savings potential.	Complete modeling effort and initiate performance validation lab tests.	Complete modeling effort.	On target	Program is meeting goal target, with final modeling results to be completed by mid-Q2.
Complete Market Characterization of Commercial Water Heating Systems in select North American Regions in partnership with Canadian and U.S. Utilities	Complete study and receive final reports by end of year.	Complete study by end of year.	On target	Program is on target. The Limited RFP was released, and a contractor was selected. Effort is set to kick off in Q2.

Water Heating Group

Infrastructure

Infrastructure				
Initiative Name	Manager	Fuel Type	Initiative Goal	
BetterBricks	Josh Pelham	Electric	To support the alliance’s commercial and industrial programs by fostering market relationships and providing tools and resources to help raise market awareness and capability for energy-efficient products, services and practices.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 5/14/2025	Comment
Influence commercial building industry perspectives and practices	Engage in 15 market events. Publish 10 pieces of original content.	Engage in 10 market events. Publish seven pieces of original content.	On target	In partnership with NEEA program teams, BetterBricks was represented at 3 market engagements in Q1, including a HVAC presentation with Big Sky ASHRAE in Billings and a technical webinar on XMP with Buildings Potential. BetterBricks published 5 new resources in Q1, including 2 new BetterBricks Industry Voices featuring Efficient Rooftop Units and Oregon Energy Codes, 1 new case study featuring energy recovery field testing on gas rooftop units, an industry news article on efficient fans and blowers, and an RTU field study report.
Increase BetterBricks brand awareness and audience reach.	Increase website traffic by 12% from 2024.	Increase website traffic by 8% from 2024.	On target	BetterBricks is finalizing its website refresh, which will launch in Q2. The new website was designed based on building decision-maker research conducted in 2023-2024 and will feature more guidance on supporting building decision-makers as they navigate building upgrades and complying with building performance standards.

Infrastructure Programs