

Natural Gas Advisory Committee

Q1 2026 Meeting (Virtual)



DATE: Tuesday, March 3, 2026

TIME: 9:30am – 2:00pm Pacific

LOCATION: Virtual only; see webinar details below to join

WEBINAR: [Click here to join the meeting](#) (Meeting ID: 297 640 028 814 73 | Passcode: JZ2Gm7wA)
(if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 803 313 548#

AGENDA (All Times Pacific)

9:30-9:50 (20 min)	Welcome, Introductions, Agenda Packet Review	Alisyn Maggiora	p. 1-2
9:50-10:05 (15 min)	Housekeeping, Looking Ahead <ul style="list-style-type: none"> ● Updates <ul style="list-style-type: none"> ○ Recent Product Council Sessions ● Previous Meeting Notes & Action Items: Oct 27 ● Announcements & Reminders <ul style="list-style-type: none"> ○ May 4-6 Efficiency Exchange Registration Open ○ Upcoming meetings, 2026 NGAC Dates <p><i>Desired Outcome: Committee refreshed on previous meeting notes/action items and aware of significant upcoming items.</i></p>	Noe Contreras Alisyn Maggiora	--
10:05-10:25 (20 min)	Portfolio Update <ul style="list-style-type: none"> ● Look Back – 2025 Market Progress Highlights ● Look Ahead – 2026 Focus Areas <p><i>Desired Outcome: Committee members aware of key areas of progress and reminded of focus areas from the 2026 Operations Plan.</i></p>	Emily Moore	p. 3
10 min	BREAK	All	
10:35-11:25 (50 min)	Quarterly Highlights <ul style="list-style-type: none"> ● New Quarterly Progress Report format ● Highlights from Q4 Quarterly Progress Report <p><i>Desired Outcome: Committee apprised of gas portfolio developments.</i></p>	Emily Moore Melissa Mejia Jason Jones Deborah Sunada Neil Grigsby Noe Contreras Chuck Karras Mark Rehley	p. 4-14
11:25-11:45 (20 min)	Dual-Fuel Work Group Updates <ul style="list-style-type: none"> ● Review and affirm Work Group Charter ● Align on objectives, cadence, expectations for 2026 <p><i>Desired Outcome: Committee members aware of plans to continue with work group and confirm purpose and objectives.</i></p>	Deborah Sunada	p. 15-17
45 min	LUNCH	All	

12:30-12:55 (25 min)	Committee Round Robin <ul style="list-style-type: none"> Share-out on recent key activities/developments <i>Desired Outcome: Committee is aware of relevant activities/developments across funding organizations.</i>	All	--
12:55-1:15 (20 min)	Emerging Opportunity: Luminaire Level Lighting Controls (LLLC) + HVAC <ul style="list-style-type: none"> Overview of how LLLC can be combined with a thermostat to control lighting, heating, and cooling in proportion to occupancy levels, delivering gas and electric HVAC savings <i>Desired Outcome: Committee members aware of potential gas portfolio opportunity, which would expand the existing electric LLLC program to include HVAC control.</i>	Chris W	p. 18
1:15-1:45 (30 min)	Commercial Water Heat Modeling Update <ul style="list-style-type: none"> Study overview & key findings <i>Desired Outcome: Committee members aware of modeling study results and understand applicability in their territory / climate zones.</i>	Noe Contreras	p. 19
1:45-1:55 (10 min)	Public comment, wrap up and adjourn	Alisyn Maggiora	--

Informational Updates:

- **Page 20:** Efficient Rooftop Units Name Change
- **Page 21:** NW Online Marketplace Update
- **Page 22-36:** Q4 2025 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Resources:

- [Newsletters on neea.org](#) (Emerging Tech | Market Research & Evaluation | Codes, Standards & New Construction)
- Q4 2025 NGAC meeting materials: October 27 [Packet](#), [Slides](#), [Notes](#)
- [NGAC Charter](#)

REMAINING 2026 NGAC MEETING DATES: *(Reminder, no Q3 standing meeting)*

Quarter	Day(s)	Date(s)	TIME (PST)	LOCATION	KEY TOPICS / NOTES
Q1	Tuesday	Mar 3	9am-4pm	<i>Now Virtual</i>	<ul style="list-style-type: none"> DF Work Group check-in Intro LLLC + HVAC opportunity ACWH Modeling Results
Webinar	Thursday	Apr 16	1-2pm	Virtual	
Q2	Tuesday	June 2	9am-4pm	*UPDATE* Hybrid (NEEA)	<ul style="list-style-type: none"> DF Work Group meeting Annual Portfolio Review (savings + risk)
Webinar	Wednesday	Sept 9	1-2pm	Virtual	<ul style="list-style-type: none"> Overview LLLC + HVAC
Q4	Thursday	Oct 22	9am-4pm	Hybrid (tentative based on topics)	<ul style="list-style-type: none"> Tentative: GHE DOAS milestone vote
Webinar	Wednesday	Dec 9	1-2pm	Virtual	

Memorandum – *Agenda item (Tier 1)*



February 24, 2026

TO: Natural Gas Advisory Committee (NGAC)
FROM: Emily Moore, Director of Market Strategy & Execution
SUBJECT: Portfolio Quick Look Back, Look Ahead

Our Ask of You:

Please bring any questions related to the gas portfolio 2026 goals and focus areas to the NGAC meeting.

Brief Overview:

To kick off the new year, NEEA staff will summarize key highlights from market and program progress in 2025 and review the key goals and focus areas for 2026.

As a refresher, the focus areas for the gas portfolio from the [2026 Operations Plan \(p 14\)](#) include:

- Deepen and expand manufacturer relationships to support and accelerate product development efforts on Efficient RTUs for the light commercial market.
- Continue testing gas heat pump and dual-fuel configurations in the Advanced Commercial Water Heating program, with an eye toward entering the market development phase of NEEA's initiative lifecycle via a Natural Gas Advisory Committee vote in late 2026 or early 2027.
- Conduct research to understand dual-fuel residential HVAC system performance and energy savings through demonstration projects and further inform target market and barriers.
- Advance at least one new dual-fuel or fuel neutral opportunity into the portfolio via a Natural Gas Advisory Committee vote.
- Leverage collaboration and investments from partners across North America, such as the GTI Emerging Technology Program and the North American Gas Heat Pump Collaborative.

If you have questions about this memo or programs in the portfolio, please contact Emily Moore (emoore@neea.org).

Introduction

Twice annually, the NEEA Gas Team provides Activity Report updates for their respective programs, as well as Emerging Technology and Codes & Standards updates. These reports highlight key program activities, as well as coordination and stakeholder engagement opportunities.

Please take a moment to review the reports. If you have any questions or would like to discuss specific items further, feel free to reach out directly to the corresponding contact for that section.

- Advanced Commercial Water Heating pages 2-3
- Dual-Fuel Residential HVAC pages 4-5
- Efficient Rooftop Units pages 6-7
- Emerging Technology pages 8-9
- Codes, Standards & New Construction pages 10-11

Contact:

- [Emily Moore](#) Director, Market Strategy & Execution
- [Mark Rehley](#) Director, Codes, Standards, New Construction, Emerging Tech
- [Neil Grigsby](#) Sr. Market Transformation Manager, Water Heating
- [Melissa Mejia](#) Program Manager, Advanced Commercial Water Heating
- [Deborah Sunada](#) Sr. Program Manager, Dual-Fuel Residential HVAC
- [Jason Jones](#) Program Manager, Efficient Rooftop Units
- [Noe Contreras](#) Product Manager, Dual-Fuel Residential HVAC
- [Chuck Karras](#) Sr. Product Manager, Advanced Commercial Water Heating

ADDITIONAL RESOURCES:

> [Quarterly NEEA Newsletters](#)

> [Quarterly Report / ED Update](#)

> [2026 Operations Plan](#)

ADVANCED COMMERCIAL WATER HEATING (ACWH) | Water Heating Product Group

[Melissa Mejia](#) | Program Manager | mmejia@neea.org

Market Transformation Goal: Increased market adoption of efficient commercial gas heat pump and dual fuel water heating systems will provide the data necessary to influence federal standards that mandate progressively higher efficiencies for gas water heating equipment. Eventually, Thermal Efficiency values exceeding 1 will become the minimum standard for commercial gas water heaters.

Product Description: Gas Heat Pumps and Dual-Fuel Commercial Water Heating Systems

Program Status: Program Development Phase (Dec 2024 – present), Program Advancement Milestone planned for Q2 2027

Sectors: Commercial, gas & dual-fuel water heating

Target Markets: Multifamily, Lodging, Full-Service Restaurants

Implementation Contractors: N/A

Program Activities	Q4 2025 Highlights
<p>Key 2025 Operations Plan Activity: ACWH Program Water Heating Product Group Strategy Key 2026 Operations Plan Activity: ACWH Program Water Heating Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> Existing field demonstrations in Portland, OR. The program is seeking to test gas heat pumps in a Northwest hotel application. Please share any leads in your service territory. Contact Melissa Mejia at mmejia@neea.org for more information.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> Ecotope’s Feasibility Study Progress Report for Dual-Fuel Commercial Water Heating captured early results indicating that dual-fuel Commercial HPWH systems are technically feasible using commercially available equipment, and that manufacturers are prepared to support integration. The final report is expected by the end of Q1. Received commercial water heating modeling results from GTI Energy, which found systems containing a gas heat pump have significant annual operating costs savings when compared to traditional equipment. Dual-fuel commercial water heating pilot underway, with system installed and in operation. Pilot is in a multifamily building in Portland, OR. Pilot will test six different load variations throughout 2026 to identify ideal load distribution to achieve optimal savings. Equipment has been procured and designs finalized for the gas heat pump commercial water heating pilot in Portland, OR, with installation to take place in Q1 2026.

	<p><u>Market Research:</u></p> <ul style="list-style-type: none"> The Market Characterization of Commercial Water Heating Systems in Select North American Regions in partnership with the North American Gas Heat Pump Collaborative is in the analysis and reporting phase, with final reports expected in early Q2. <p><u>Other:</u></p> <ul style="list-style-type: none"> CEE gas heat pump QPL is live.
<p>Resources for Utilities</p>	<p>CEE Gas Heat Pump Qualified Products List</p>
<p>Other Highlights</p>	<ul style="list-style-type: none"> Dual-fuel pilot performance is displayed in real-time in EcoDash, (a performance monitoring tool developed by Ecotope), allowing for clear event tracking, pattern recognition, and system monitoring. Real-world data and the Feasibility Study will help inform the expansion of EcoSizer (a commercial water heating system design tool developed by Ecotope) to include dual-fuel systems.

Initiative Lifecycle



EFFICIENT ROOFTOP UNITS (RTUs) | HVAC Product Group

[Jason Jones](#) | Program Manager | jjones@neea.org

Market Transformation Goal: Ultimately, the ERTU program will provide evidence needed to support an updated federal standard by 2034 that requires at least 20% more efficient RTUs than the 2020 market average.

Product Description: A packaged rooftop unit, or RTU, is a type of HVAC system that contains all the components needed to provide conditioned air and ventilation in one concise unit and is located on the roof of a building. Packaged rooftop units are commonly found in light and large commercial applications. They are very popular with retail and industrial properties.

Program Status: Market Development Phase (Oct. 2022 – present)

Sectors: Commercial, gas HVAC

Target Markets: Commercial HVAC

Implementation Contractors: Energy350, Resource Innovations

Program Activities	Q4 2025 Highlights
<p>Key 2025 Operations Plan Activity: RTUs Program HVAC Product Group Strategy Key 2026 Operations Plan Activity: RTUs Program HVAC Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> Working with Energy Trust’s Existing Buildings on a project in Salem, OR for planned RTU replacement. The program is seeking to conduct field studies to validate the National RTU Energy Modeling (linked below) for gas-fired (gas or hybrid heating) RTUs. Please share any leads in your service territory. Contact Jason Jones at jjones@neea.org for more information.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> Manufacturer Rep outreach is ongoing (details in Market Progress Report). The program has identified multiple projects with reps to include Efficient RTUs as a replacement for code-level equipment. Manufacturer outreach is ongoing (details in Market Progress Report). Working closely with manufacturers to increase uptake of qualified products in the region in partnership with the rep networks. <p>Market Research:</p> <ul style="list-style-type: none"> Market Progress Evaluation Report (MPER) #2 contract and scope is currently being defined and will commence in 2026. Energy Recovery Ventilators (ERV) Ownership and Maintenance Report of Findings will be posted in early 2026 Rooftop Unit Lead Time Study Research Objectives are under final review. Study will commence in Q1 2026.

	<p>Other:</p> <ul style="list-style-type: none"> • Program continues to work with the Consortium of Energy Efficiency (CEE) to include expanded commercial HVAC values to the Air Conditioning, Heating and Refrigeration Institute (AHRI) directory to inform utility program needs.
Resources for Utilities	<ul style="list-style-type: none"> • Advanced performance RTUs: System requirements & compliant equipment • Advanced performance RTUs - BetterBricks • National Efficient Rooftop Unit Energy Modeling - Northwest Energy Efficiency Alliance (NEEA)
Anything else??	<ul style="list-style-type: none"> • Jason Jones presented to the American Gas Association (AGA) Gas Efficiency Matters (GEM) group and participated in a panel at the AGA Climate and Sustainability meeting. Topics included how the Efficient RTU program is looking to increase efficiency in gas-fired RTUs through better enclosure design and energy recovery.

Initiative Lifecycle



DUAL-FUEL RESIDENTIAL HVAC (DFRHVAC) | HVAC Product Group

[Deborah Sunada](#) | Sr. Program Manager | dsunada@nea.org

Market Transformation Goal: More efficient and grid-enabled dual-fuel systems will become the standard dual-fuel solution; manufacturers will produce and promote these systems; and contractors will design and install the most optimal systems, delivering reduced energy waste, grid flexibility, cost savings, and year-round comfort.

Product Description: The efficient product is a residential condensing forced air ducted gas furnace combined with a low-load efficient heat pump (HP). The dual-fuel system (DFS) requires a controller (which could be as simple as a thermostat) that determines when to operate the HP or furnace.

Program Status: Program Development Phase (September 2025 – present)

Sectors: Residential, gas HVAC

Target Markets: Single-Family Residential Homes

Implementation Contractors: TBD

Program Activities	Q4 2025 Highlights
<p>Key 2025 Operations Plan Activity: Entered portfolio Sept.2025 HVAC Product Group Strategy Key 2026 Operations Plan Activity: DFRHVAC Program HVAC Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> • Ongoing technology demonstration (Clark/NWN). • The program will conduct field studies to evaluate residential thermostat settings, including switchover points, to identify values with a high likelihood of user adjustment and reduce post-commissioning changes • Assessing laboratory testing, in collaboration with Oak Ridge National Laboratory (ORNL) and/or Pacific Northwest National Laboratory (PNNL), to evaluate controller decision-making behavior that determines whether high-efficiency equipment delivers its intended field performance across key manufacturers • Serving as an advisor to GTI Energy on the Cascade Natural Gas dual-fuel demonstration in Bend, Oregon.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> • A Dual-Fuel literature review and gap analysis are underway to determine additional pilots and demonstration opportunities. • GTI Energy lab testing of dual-fuel system (Heat Pump + Hydronic AHU) underway • GTI Energy modeling dual-fuel systems with expanded analysis on retail price, performance, marginal emission factors and building size • Dual-Fuel (Furnace + Heat Pump) lab testing complete (co-funded with Utilization Technology Development (UTD)), final report pending.

	<p>Market Research:</p> <ul style="list-style-type: none"> • Market Characterization RFP issued and contractor selection in progress • Conducting an HVAC installer focus group to gather insights on dual-fuel system installation, controls, and market barriers. <p>Other:</p> <ul style="list-style-type: none"> • Program continues to work with the Consortium of Energy Efficiency (CEE) to align on a Residential HVAC dual-fuel specification to inform utility program needs.
<p>Resources for Utilities</p>	<ul style="list-style-type: none"> • Dual-Fuel HVAC White Paper • Dual-Fuel and Gas Heat Pump Market Research • Dual-Fuel Heat Pump System Analysis
<p>Technical Research</p>	<ul style="list-style-type: none"> • TriMode Electric Monobloc ATW Heat Pumps with Gas Backup for Affordability and High Efficiency – (Co-funded with UTD)
<p>Other Notable Highlights</p>	
<p>Manufacturer Engagement</p>	<ul style="list-style-type: none"> • Met with Mitsubishi Electric, Lennox, and Trane to discuss dual-fuel utilization efficiency (DFUE) and dual-fuel demand response. Overall, they are not yet using DFUE and believe their existing products address demand-response needs. • Thermostat exploration from the BPA field study - Inconsistent terminology and control strategies across OEMs create material risk in system selection, contractor guidance, and expected performance outcomes. The team is planning to explore which of these risks can be addressed within a product specification.

Initiative Lifecycle



Scanning / Emerging Tech

Other notable highlights.

<p>Gas High Efficiency Dedicated Outside Air Systems (GHE DOAS)</p>	<ul style="list-style-type: none"> • A measurement & verification (M&V) field study kicked off at the end of February, studying the performance of a GHE DOAS system serving an office building in Salem, OR. This data will be instrumental in characterizing the real-world performance throughout both heating and cooling seasons. • The GHE DOAS team is actively pursuing 3rd party incremental cost analyses for a GHE DOAS system design vs baseline design options. • The activities listed above are in support of a targeted Q4 proposal to NGAC, seeking expansion of the existing electric-only High-Performance HVAC program to include a gas (GHE DOAS) option.
<p>Luminaire Level Lighting Controls (LLLC) with HVAC Control</p>	<ul style="list-style-type: none"> • This topic is on the agenda, please see memo on pg.18
<p>Dual-Fuel Residential HVAC</p>	<ul style="list-style-type: none"> • Rinnai Heat Pump Companion is an add-on hydronic coil that converts an all-electric air-source heat pump system into a dual-fuel system • Napoleon has partnered with GTI Energy to develop controls for a dual-fuel system with hydronic back-up. • Flair developed an integrated HVAC controls for zoning, airflow balancing, stage heating, and ductless control.
<p>Dual-Fuel Residential Water Heating</p>	<ul style="list-style-type: none"> • Navien partnering with GTI Energy – Emerging Technology Program to test a dual-fuel hydro-furnace.
<p>North American Gas Heat Pump (GHP) Collaborative (Commercial)</p>	<ul style="list-style-type: none"> • The North American Gas Heat Pump Collaborative (NAGHPC) kicked-off 2026 with the new Collaborative Administer, ICF. The Collaborative will work on finalizing 2026 work plans and funding agreements that continue to accelerate the development and adoption of gas heat pump technology throughout North America. • Collaborative members attended the Consortium for Energy Efficiency (CEE) Winter Meeting in January to discuss gas heat pump and dual-fuel system support and share learnings from utility programs and demonstration projects. CEE and the Collaborative will meet throughout 2026 to strengthen coordination efforts that bring gas heat pump and dual-fuel technology to the market.

	<ul style="list-style-type: none"> • The Commercial Water Heating Market Characterization has completed supply chain interviews, market actor surveys, and the market structure assessment. Regional results are being finalized and a draft report will be reviewed by Collaborative members in March.
<p>Conferences / Events Highlights</p>	<p><u>Looking Ahead:</u></p> <ul style="list-style-type: none"> • Hot Water / Hot Air Forum (week of Mar 23, 2026) • AHR EXPO 2026 <ul style="list-style-type: none"> ○ Decarbonizing commercial kitchens was described as a multi-system, multi-stakeholder problem involving HVAC, cooking equipment, ventilation, operations, and human behavior. ○ Controls & software are defining the battleground ○ Refrigerants & System Architecture Trends include R290 and CO2 systems and hybrid architecture ○ Multiple new RTU products including Inverter HP offerings in 3-5 ton, increased focus on custom features (like double wall construction) being brought to light commercial, and new tech using desiccant and gas HPs.

Codes, Standards, & New Construction

Other notable highlights.

<p>State Codes</p>	<ul style="list-style-type: none"> • Washington State – The 2024 Washington State Energy Code for residential and commercial buildings is currently in development. Both are scheduled to be finalized late 2026. • Oregon - The 2026 Oregon Residential Specialty Code (ORSC) update process is currently underway. The 2026 ORSC is scheduled to be finalized in late-2026 and to go into effect April 1, 2027 • Idaho - In late 2025, the Idaho Building Code Board (BCB) held a Negotiated Rulemaking and a regular Board meeting to finalize the 2024 building codes rules package. The BCB voted unanimously at its October meeting to advance this package (see docket 24-3930-2502) to the state legislature, which is expected to consider adopting these code updates in its 2026 session. • Montana - The Montana Building Code Council (BCC) has started to review the 2024 IECC for potential adoption. They are currently reviewing responses to their request for comments.
<p>International Energy Conservation Code</p>	<ul style="list-style-type: none"> • In Q4 2025, the proposals voted for approval in the first round of code development were incorporated into 2027 IECC Public Draft #1. A second round of code change proposals were solicited for any further modifications to elements modified in this first draft. The IECC Commercial and Residential Consensus Committees will reconvene in early 2026 to process these proposals. • NEEA staff currently serve on the Commercial Consensus Committee, the Commercial HVAC subgroup and the Residential Modeling & Whole Building subgroup.
<p>National Standards</p>	<ul style="list-style-type: none"> • DOE only posted one docket in Q4 2025. NEEA staff submitted comments on DOE’s request for information on Energy Conservation Standards for Manufactured Housing
<p>State Standards</p>	<ul style="list-style-type: none"> • Washington and Oregon updated their water heater standard to the latest version of the CTA-2045 standard.
<p>New Construction</p>	<ul style="list-style-type: none"> • NEEA staff and the BetterBuiltNW team began working with the Regional Technical Forum (RTF) on the New Homes Protocol (Protocol) which was up for review in Q4 2025. The Protocol defines the savings calculations for the Performance Path measure, which regional utilities can use to offer incentives on new homes. The Protocol review was extended into Q2 2026 and it is expected that an updated Protocol will be finalized by the RTF by the end of April 2026. The BetterBuiltNW team will then update the Performance Path measure, reflecting changes to the Protocol and state code baselines.

	<ul style="list-style-type: none">• The BetterBuiltNW training team delivered two webinars in Q4 2025 – Cold Climate Strategies and Long-term Air Barrier Performance, which are now both available for on-demand.• Monthly BetterBuiltNW newsletters were published and distributed, with topics that included cold climate heat pumps, an update on the Oregon code adoption, and a summary of regional utility new homes incentive programs. Current and past newsletters can be found on BetterBuiltNW’s website.
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Memorandum – Tier 1 (Agenda item)



February 24, 2026

To: Natural Gas Advisory Committee
From: Deborah Sunada, Sr. Program Manager, Dual-Fuel Residential HVAC
Subject: Dual-Fuel HVAC Work Group Charter Review and Check-in

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Our Ask of You:

Review the memo below and Dual-Fuel Work Group Charter on the subsequent pages – in particular the four (4) objectives. Come ready to confirm your organization’s continued involvement and discuss:

- *Do the work group objectives resonate with you? Are there adjustments you recommend?*
- *What do you hope to get out of the work group in the coming year? How can this support your dual-fuel objectives?*
- *What meeting frequency do you recommend?*

Brief Context:

The Dual-Fuel Work Group was initially established in April 2023 as a forum for sharing insights, coordinating efforts and ultimately supporting dual-fuel adoption in the region. A key purpose of the work group was to inform dual-fuel programs and market transformation within the region, reduce duplication of efforts, and better steward ratepayer funds.

As previously discussed with NGAC, there is continued value in dedicated meeting time to discuss respective dual-fuel activities in the region. The intention is to leverage the existing 2026 NGAC meeting schedule for work group meetings, which would mean adding time before or after the regularly scheduled NGAC meeting or utilizing an interim webinar. NEEA staff propose holding the next work group meeting on Tuesday, June 2nd, before or after the NGAC meeting. Additionally, NEEA staff propose revisiting the charter annually to determine the continued relevance and need.

For reference, here are the remaining 2026 NGAC meeting dates:

Quarter	Day(s)	Date(s)	TIME	NOTES
<i>Interim Webinar</i>	Thursday	Apr 16	1-2pm	
Q2	Tuesday	June 2	Hold: 9-4	• Planned work group meeting (time TBD)
<i>Interim Webinar</i>	Wednesday	Sept 9	1-2pm	
Q4	Thursday	Oct 22	Hold: 9-4	
<i>Interim Webinar</i>	Wednesday	Dec 9	1-2pm	

If you have any questions regarding the Dual-fuel Work Group, please contact Deborah Sunada (Dsunada@neea.org).

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NGAC WORK GROUP CHARTER

Purpose of Work Groups

The purpose of NEEA Work Groups is to support alliance success by collaborating with NEEA staff to achieve specific objectives identified by the Natural Gas Advisory Committee (NGAC) and/or NEEA staff, consistent with the goals and objectives of NEEA’s then-current Business Plan and annual Operations Plan. Work Groups shall be formed on an as-needed basis and staffed with as-needed expertise, for a limited term and specific purpose that is distinct from that of NGAC.

An NGAC member and/or NEEA staff may propose to NGAC the formation of a work group, including guidance on desired stakeholder representation and expertise (i.e. right people, right topic, right time). NGAC is responsible for sponsoring the formation of all NGAC-related Work Groups, and shall conduct an annual review of each active Work Group to ensure its purpose remains both relevant and distinct from that of NGAC and any other active Work Group.

Responsibilities

1. Collaborate with NEEA staff to support the objective(s) identified by NGAC (see *Objectives* below), sharing knowledge, expertise and resources to achieve the identified objective(s).
2. Determine with NEEA staff the appropriate meeting cadence and required duration for the Work Group, and commit the resources required to achieve the identified objective(s) on schedule.
3. Ensure information and outcomes from Work Group collaboration are (a) shared within Work Group-member organizations, and (b) reported to NGAC, and the Natural Gas Board Committee (NGC) if applicable.
4. Sunset the Work Group (a) on schedule or upon extension¹ from NGAC, and (b) upon achieving the objective(s) set by NGAC.

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DUAL-FUEL WORK GROUP

Statement of Purpose and Connection to Business and/or Operations plans

A work group is recommended for the purpose of informing and accelerating dual-fuel work programs and market transformation within the region. The potential for overlapping activities likely exists and collaboration will likely avoid duplication of efforts, better steward ratepayer funds, and accelerate dual-fuel market transformation efforts. The level of relevant dual-fuel activities within the region exceed the available time for discussion within NGAC meetings and so additional time via a work group is recommended.

Primary focus of discussions will be on residential applications, but many topics may be relevant to commercial as well.

Objective(s)

1. High-level awareness ~~of~~ product and market explorations within region-
2. Well-coordinated activities and investments among regional stakeholders (well-planned use of regional ratepayer funds, avoidance of duplication, etc.)-
3. Awareness of relevant extra-regional work and insights

¹ In the event a Work Group requires additional time to achieve its objective(s), beyond the duration identified in Responsibility #2, a justification shall be provided to RPAC for approval.

4. ~~Identify methods of staying coordinated beyond meetings in work group~~ Building a Awareness of policy and regulatory developments affecting dual-fuel work
5. ~~Develop initial vision for alliance engagement in dual fuel in the Northwest~~

Outcomes Reported To: NGAC only NGAC and NGC

Estimated Duration and Meeting Cadence

- Start date: June 2023; renewed March 2026
- Meeting frequency: ~~3~~ 4 times per year
- Completion/sunset date: Q1 2027 (at this time charter will be reviewed by NGAC and determination made regarding continuation or sunset of the work group)
- Expected time commitment: Individual preparation time for each meeting, including review of materials and coordination within individual organization to prepare for share outs (1-2 hours). Occasional offline reviews or information gathering may be necessary (~1 hour).

Specific Expertise Needed

- Program developers; individuals conducting market research, pilots/demos, etc.; Invited experts who may share expertise on specific topics at individual meetings

NEEA Staff Representation Expected:

- Program management; Product management; Market, Research & Evaluation; HVAC Market Transformation management; others with expertise as relevant to agenda

Memorandum – *Agenda item (Tier 1)*



February 24, 2026

TO: Natural Gas Advisory Committee (NGAC)
FROM: Chris Wolgamott, Principal Product Manager
SUBJECT: Luminaire Level Lighting Controls (LLLC) and HVAC

Our Ask of You:

Bring any questions you have regarding this emerging opportunity, and consider how your utility might approach promoting a commercial thermostat that uses Luminaire Level Lighting Controls (LLLC) occupancy data. This is an emerging opportunity for the natural gas portfolio that would leverage NEEA’s existing electric LLLC program to expand to HVAC control, delivering natural gas and electric savings.

Brief Overview:

NEEA staff will present an emerging technology opportunity that offers dual fuel savings in small to medium commercial buildings that are common throughout the four-state region. The emerging opportunity combines a commercial thermostat that controls a single Roof Top Unit (RTU) with occupancy data from LLLC to adjust lighting, heating, and cooling in proportion to occupancy levels.

One of the benefits of LLLC is the granularity of the occupancy data that can be collected from the sensors in the fixtures. This granular occupancy data can be used to provide better occupancy inputs for the HVAC system to operate more efficiently. We are looking at a system approach to using the occupancy data from the LLLC system to inform the thermostat to optimize performance. Currently we are only looking at single zone RTUs, which according to the DOE is approximately 60% of the commercial square footage in the Northwest.

NEEA staff are researching how to use the occupancy sensors in the LLLC to act as a proxy for people counting to provide granular data to the thermostat to optimize the HVAC operations based on true occupancy data. It is the goal of this project to have the LLLC “speak” directly to the thermostat and, based on the amount of occupancy, have the deadband increase or decrease thus allowing the temperature to “float” without changing the temperature on the thermostat. We are projecting energy savings of between 7-15% for the HVAC on top of the 65%+ from the LLLC for lighting controls. This HVAC savings can come from either natural gas or electric. The heating savings will be the larger percentage of the overall savings.

Please contact Chris Wolgamott (cwolgammott@neea.org) if you have questions about the LLLC & HVAC product.

Memorandum – *Agenda item (Tier 1)*

February 24, 2026



TO: Natural Gas Advisory Committee (NGAC)
FROM: Noe Contreras, Sr. Product Manager, Natural Gas
SUBJECT: Energy Modeling Analysis of Commercial Water Heating Systems

Ask of You:

Please review the summary below and come to the Q1 NGAC meeting with any questions about the study.

Desired Outcome:

Committee informed on modeling that has notable impacts to near- and long-term goals.

Brief Overview:

NEEA staff will share results of an EnergyPlus-based modeling study evaluating hybrid commercial service water heating (SWH) systems that combine heat pumps with conventional gas-fired equipment. The goal is to understand how emerging technologies—particularly gas absorption heat pumps (GHPs) and electric heat pump water heaters (HPWHs)—perform relative to traditional boilers, tankless, and storage water heaters across different building types and climates.

The study focuses on three representative commercial building types: full-service restaurants, multifamily buildings, and hotels/motels. High-resolution, real-world hot water demand datasets were used to generate conservative load profiles and inform realistic system sizing. Hybrid systems were modeled with heat pumps sized to meet roughly 30–60% of peak demand, with conventional equipment serving peak loads. Simulations examined multiple climates (including Portland, Seattle, Boise, and Missoula), system configurations, storage sizes, and setpoints.

Key Findings:

- Modulating GHPs and electric HPWHs consistently deliver higher seasonal efficiencies than non-modulating GHPs and conventional systems, especially when paired with appropriate storage and operated at lower return temperatures.
- Operating cost savings are highly sensitive to regional electricity-to-gas price ratios; gas-based heat pumps often show strong economic performance in regions with relatively low gas prices.
- GHG emissions impacts depend on local grid emission factors and the balance between baseload and peak electricity generation, but well-designed hybrid systems can reduce emissions relative to traditional gas-only SWH plants.
- Proper system sizing and buffer storage are critical to avoiding cycling losses and unlocking both efficiency and cost benefits.

Please contact Chuck Karras (ckarras@neea.org) and/or Melissa Mejia (mmejia@neea.org) if you have questions about this study or the Advanced Commercial Water Heating Program.

Memorandum – *Informational (Tier 2)*



February 24, 2026

TO: Natural Gas Advisory Committee (NGAC)
FROM: Jason Jones, Program Manager, Efficient Rooftop Units
SUBJECT: Commercial HVAC Programs Name Change

Our Ask of You:

Please review the memo and contact me at the email below with any questions, recommendations, or feedback.

Brief Overview:

The Efficient RTUs program and electric-funded High-Performance HVAC program (using the Very High Efficiency DOAS system) are planning to update their names to Advanced Performance RTUs & Advanced Performance DOAS, respectively. The reasoning for this change is based on the following:

- **Market confusion** – similar versions of both program names are used for unrelated programs/efforts across the industry, including “Efficient Rooftop Units” – CalMTA, “High Performance HVAC” – National Comfort Institute, and “Very High Efficiency HVAC” – Institute for Market Transformation.
- **Lack of market connection to current program/technology names** – Market feedback collected by both programs has suggested either confusion with the program names or a lack of connection. This includes the Efficient RTU Market Progress Evaluation Report #1 that found contractors and suppliers identify the term “efficient RTUs” as RTUs with better-than-code IEER or AFUE values, rather than whole box improvements.
- **Desired alignment between programs** – Currently, the Efficient RTUs program and High-Performance HVAC program are perceived as two disconnected solutions. NEEA would like to use this program name update as an opportunity to align both programs under one unifying naming convention.

Next Steps:

Both programs began updating their respective webpages on the BetterBricks platform in February and present the new names to external market actors during Q1. Based on the reaction to this soft launch, a decision will be made by mid-to-late Q1 to make this change permanent and complete a comprehensive update to NEEA internal systems.

In the meantime, NGAC members are invited to reach out with any feedback or questions regarding this planned update.

Please contact [Jason Jones jjones@neea.org](mailto:jjones@neea.org) if you have questions about the **Efficient Rooftop Units** program name update.

Memorandum – Informational item (Tier 2)



February 24, 2026

TO: Natural Gas Advisory Committee (NGAC)

FROM: Alisyn Maggiora, Sr. Stakeholder Relations Manager
Steve Seminario, Market Transformation Manager, Consumer Products

SUBJECT: Northwest Online Marketplace (Enervee): Pilot Update

Our Ask of You:

This is an inform. Please review the context below and reach out with questions or to discuss.

Site Link: The NW Marketplace site is nw.enervee.com.

Overview – What’s Next:

Based on the results of the initial phase (see context in this [Q4 2025 NGAC update](#)), NEEA is in the process of contracting with Enervee to pilot an online marketplace for three years (2026-29) and is moving forward with five funding utilities (list below) to host their own subsite on this platform. At the basic participation level of \$10K/year, utilities that leverage this platform for their own site, will have branded landing pages, customized product lists and for an additional cost, be able to highlight and process rebated products and offer instant rebates via an e-commerce (buy-now) capability.

Waiving Setup Fee:

NEEA will cover the initial setup fee (\$10k/utility) for alliance funders that want to join the pilot in this initial launch (Q1 2026). NEEA staff have additional documentation that summarizes the pilot offering and details, and are happy to provide a demo if desired. At this juncture, all alliance funders have been notified of this opportunity, and a majority have received demos, with a handful moving forward in the pilot.

Participant Engagement & Timing:

Initial participating organizations include Idaho Power, Tacoma Power, Clark PUD, Energy Trust, Pacific Power, and NW Natural. We expect the NEEA/Enervee contract to be completed in February, and Enervee’s contract initiation with participants to begin immediately thereafter. Individual site requirements / desirables (e.g., branding, visible product categories) will follow contracting, with subsite launches targeting end of Q1.

Eco Financing:

Enervee is nearing completion of a significantly enhanced Eco-Financing offering backed by a large national FDIC insured bank, expecting a launch in Q1 (likely February). NEEA plans to demonstrate the new functionality to participating utilities and other interested parties once available. This functionality is attractive to NEEA and utilities from an affordability standpoint.

Why Is NEEA Doing This:

The market transformation opportunity with the Northwest Marketplace is to raise the overall energy efficiency of Northwest consumer product sales by making it easy to find, evaluate, compare and source energy efficient products. Many alliance utilities would like an online marketplace, but they are expensive as a standalone for each individual utility. By NEEA offering this regional platform and enabling utilities to have their own customized landing pages/subsites, this significantly reduces their cost and may enable a utility to offer incentives on products that were previously not cost-effective (by reducing the administrative burden). In its basic form, the site also serves as an educational tool (service) for customers, which has been proven valuable but for which most utilities cannot get rate recovery.

Please contact Alisyn Maggiora amaggiora@neea.org if you have questions about the Northwest Marketplace or the Enervee-based Pilot launching this quarter.

Market Progress Quarterly Report

Residential



Retail Products
Portfolio



Heat Pump Water
Heaters



Advanced Heat
Pumps

Commercial and Industrial



High Performance HVAC



Extended Motor Products



Efficient Rooftop Units



Efficient Fans



Luminaire Level Lighting
Controls



Advanced Commercial
Water Heating

Infrastructure



BetterBricks

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal
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Consumer Products Product Group	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 2/3/2026	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.	Heads up	The program implemented a regional ad campaign with Best Buy for November and December, advertising ENERGY STAR televisions on the Best Buy website and on the internet. The results of this campaign are forthcoming. The program also implemented an ad campaign for ENERGY STAR televisions on televisions in Costco stores throughout the Northwest beginning in December and running through early February. This hits the threshold level for this goal. The program continues to talk with Costco about joining ESRPP for 2026 and is considering other options for gaining a required third retailer to support ENERGY STAR TV incentives.
	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.	Action required	The EPA did not move forward with new ENERGY STAR refrigerator specifications. Contracting is in process for conducting research on developing a future test procedure that recognizes savings on adaptive technologies. This research will also help NEEA identify potential refrigerator savings to meet cycle 7 goals.
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.	Action required	The EPA did not move forward with new ENERGY STAR clothes washer specification setting. The team made advancements in laundry as follows: Dryer test procedure research is in the final phases of publishing. While there are no immediate DOE or ENERGY STAR standards or specification actions to be taken, the data and findings will support recommendations in the future. The team is also beginning research on product barriers to adoption for the new all-in-one washer/dryer category. The intent of this research is to identify potential product improvements that could increase market adoption of heat pump dryer technology in this category.	

Residential

Residential					
Initiative Name	Manager	Fuel Type	Initiative Goal		
Consumer	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 2/3/2026	Comment
	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 program developed an Evaluation Toolkit for sponsors of the ESRPP program. This toolkit was completed in Q3 and introduced to other program sponsors in Q4 to support their upcoming evaluations.

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 2/3/2026	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 ended Q4 with a total of 133 installers listed on the installer finder. In Q4, new installers were added located in Oregon and Washington. In 2025 overall, the program increased the number of installers listed on Hot Water Solutions by 15%, meeting the threshold for this goal. Installers were added from all four states in the region throughout the year.
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	This goal was achieved in Q3. In Q4, the Advanced Water Heater Initiative (AWHI) completed a regional matrix identifying key barriers, opportunities, and stakeholders across the Southeast, Northeast, Southwest, and Northwest. In 2026, as part of NEEA’s sponsorship, AWHI will build on this work by identifying and recommending the top 2–3 organizations in each region with the strongest potential for collaboration with NEEA. <p>Recommendations will be based on organizations that:</p> <ul style="list-style-type: none"> - Have statewide or regional influence to accelerate heat pump water heater (HPWH) adoption - Are leading efforts that NEEA/AWHI can leverage - Represent new strategic relationships for NEEA/AWHI AWHI will facilitate introductions to these priority organizations.	

Residential

Residential					
Initiative Name	Manager	Fuel Type	Initiative Goal		
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 2/3/2026	Comment
	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.	Heads up	Documentation of barriers and opportunities unique to the two identified customer segments with low adoption rates will be completed in 2026 in preparation for consumer marketing campaigns. This information will inform campaign targeting to reach these priority segments. In Q4, the program launched the "Level Up" awareness campaign, which ran from October 1 until December 21. The campaign was both digital and audio, and this year the campaign added Spanish-language advertising in addition to English. Both English and Spanish content demonstrated strong engagement across platforms. The campaign successfully drove traffic to the campaign landing page, generating over 235,000 clicks and substantial website activity from audiences across the Northwest. The results of the campaign represent a 30% increase in web sessions over the 2024 campaign.

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.	
2025 Operations Plan Milestones	Target	Threshold	Status as of 2/3/2026	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.	Heads up	Threshold met. Nine heat pump manufacturers participated in NEEA-led working group to develop a connected commissioning specification. Specification v1.0 draft was finalized in December and is out for Manufacturer comment. Two major manufacturers agreed to participate in 2026 demonstration and case studies of this specification. In 2025, several heat pump manufacturers reported to NEEA they have begun testing their equipment to the new Air-Conditioning, Heating, and Refrigeration Institute (AHRI) requirement that systems operate as true variable speed (this is called the controls verification test procedure), which was co-developed and supported by NEEA.
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.	Heads up	Threshold met. Field research analysis was completed in 2025. Final report drafting, recommendations, and gap analysis for future field study to be completed in Q1 2026.
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.	Heads up	The program communications resources developed for three improvements include: message mapping, presentation slides, fact sheets, and BetterBuiltNW.com and NEEA.org website content.

HVAC Product Group

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 2/3/2026	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	The program exceeded the target of 10 awareness and/or educational efforts by Q3 and held additional events in Q4. This was highlighted by the completion of a 2-part webinar + building tour of the Metropole building in Seattle. This project utilized the Very High Efficiency DOAS system design as well as other energy efficient design strategies and had a very solid turnout for both events. Due to the positive feedback from attendees, additional webinar + building tours are tentatively planned for 2026.
	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 progress on this goal has not changed since Q3. Manufacturers have increasingly expanded their product lines in 2025 to include additional capacities. While the specific pricing for the new product lines is not available through current data, anecdotal feedback from the manufacturers suggests the pricing gap has narrowed. The program anticipates receiving full market sales data from multiple manufacturers in 2026 to verify the product costs. This will include historical sales data pre-2026 to provide trend lines.
	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	No new comments for this quarter's update. As reported in the Q2 update: The team submitted a code change proposal for 2027 IECC to require DOAS for some commercial building types. In Q1, this proposal was recommended for disapproval by the commercial HVAC subgroup by a vote of 6-3 (with 2 abstentions) and was officially disapproved by the main consensus committee vote in late-May. While the proposed language was not accepted 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).

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 2/3/2026	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.	Heads up	Threshold met of two manufacturers bringing new eligible equipment to the market. CaptiveAire's Paragon product line has been vetted by the team and is added to the compliant product list. Greenheck/Valient has developed a new RTU line which incorporates better enclosure insulation and improved efficiency. Product was specifically developed to bring better-than-code features in an economic package. Greenheck has been increasing production of these RTUs through 2025.
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.	Action required	Target/threshold not met. However, the team improved outreach and engagement with supply chain partners and worked closely with two manufacturer representatives to receive HVAC project data and identify projects that could be submitted with Efficient RTUs for installation. Recruitment has been difficult due to the differences in product paths to market. Code-level RTUs are primarily sold through distributors on a like-for-like replacement basis, whereas the advanced products on the Efficient RTU compliant list are sold through the manufacturer rep network on projects for the planned replacement market. In 2025, the program improved and increased relationships with the reps for these longer-lead-time projects and has a good pipeline created for success in 2026.
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.	Action required	Target/threshold not met. The program has developed four new marketing resources: a case study for the KBOO field demonstration, a re-design of the BetterBricks Efficient RTU page, a brochure for distributors that explains the benefits of the ERTU specification elements, and a one-page flyer on ERTU program details. The team also started development on a website campaign for 2026 that will help building owners or facility managers identify how ERTUs would be a good option for HVAC equipment replacement projects.

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 2/3/2026	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 met its annual goal of rolling out four new success stories with new videos on LLLC projects by McCall Hall and Mount Vernon Library in Q4. These success stories provide the market with relevant and credible examples of the value of installing LLLC.
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	With collaborations with three local manufacturer sales representatives in Q4, the program completed thirty-three collaborations in 2026, slightly exceeding the goal of thirty-two. Of those thirty-three collaborations, eighteen were with manufacturer representative who have never partnered with the program before, far exceeding the subgoal that eight representatives would not have previously featured LLLC at a public event. Collaborations with manufacturer representatives spotlight local sales success and positions LLLC as a preferred solution to meet customer needs.
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	The program collaborated with three specifiers at two events in Q4 for a total of nine for 2026, which slightly exceeded the goal of eight. All three specifiers in Q4 had not previously partnered with the program for a total of five for year which slightly exceeded the sub-goal of four new specifiers. Collaboration with specifiers on events and education supports the program strategy of peer to peer influence in order to position LLLC as a favored lighting solution for specifiers.

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 2/3/2026	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	With its engagement of IES (Illuminating Engineering Society) in Q4, the program met its national and extra regional partnership goal of four organizations for 2025. NEEA Principal Product Manager Chris Wolgamott has been elected to the IES Board of Directors. Additionally, IES' "Lighting Practice: Lighting Control Systems – Properties, Selection, and Specification Practices" (LP-6) has been updated and now incorporates LLLC, bringing further credibility to LLLC as a mainstream lighting solution.

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 2/3/2026	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	The program had strong Q4 results, with Smart Pumps comprising 24% of total pump sales observed, and Smart Circulators comprising 25% of total circulator sales observed. Full-year 2025 data was more mixed due to a rocky first half of 2025. Smart Pumps comprised 23% of the market for 2025, reaching our target of 23%; however, Smart Circulators finished 2025 at 22% of overall circulators, below our 23% target.
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	For the full-year 2025, participating distributors and the NEEA field team led or participated in 18 educational events focused on pump efficiency and featuring the Energy Rating label. In addition, NEEA supported 71 distributor-hosted events such as counter-days and lunch & learns focused on Smart Pumps and Smart Circulators. In addition, we created four new resources for BetterBricks, and published an article about Smart Pumps in the December 2025 issue of Pumps & Systems Magazine (link).
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.	Heads up	The XMP Program team ended 2025 with 10 active participants, one below the target of 11 active participants (but above the threshold). Some prospective participants recruited in 2025 may still join the program in 2026.

Motors Product Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
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 2/3/2026	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	Heads up	Threshold met. Two new partners successfully engaged in 2025. Data gathering agreements are in place and data was received in 2025 from both. Engaged new partners in message testing and began implementing learnings in ongoing engagement.
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	Research was completed with initial results reviewed at the end of Q3 2025.
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.	Heads up	Threshold met. Conducted data analysis to identify low FEI opportunities (completed for Greenheck) and implemented ongoing evaluation of fan selection and efficiency options using manufacturer feedback (Johnson Air, Greenheck,) to identify technical barriers and inform targeted market transformation interventions.
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	Baseline was submitted for third-party review in early Q3 2025.

Motors Product Group

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Advanced Commercial Water Heating	Melissa Mejía	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 2/3/2026	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	Heads up	<p>The program remained informed on Robur's new gas absorption heat pump product, continued management of co-funding Vicot's North American product certification via the North American Gas Heat Pump Collaborative, and coordinated with Stone Mountain Technologies on field testing in 2026. Regarding dual fuel systems, the program team met with Lochinvar, Mitsubishi, and Mestek to gather feedback on system designs and discuss their interest in the dual fuel market.</p> <p>This goal's status is "heads up," because this engagement has not resulted in tangible training initiatives, however, the foundations have been set to deliver a contractor training on the Anesi unit for the 2026 field test as well as dual fuel system best practice guidance to be developed in 2026 based on electric heat pump manufacturer engagement.</p>
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	The dual fuel demonstration kicked off, with system installation completed and metering in place. The demonstration will test six different load variations throughout the duration of the project, with the first variation taking place in Q1 2026. Regarding the gas heat pump demonstration, system designs have been finalized and all equipment procured. Metering will begin in Q1 2026. Each demonstration will take place over a full year, with final reports expected in Q1 2027.

Water Heating Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Advanced Commercial Water Heating	Melissa Mejía	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 2/3/2026	Comment
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	The program is meeting the goal target, having received modeling results in Q4. Modeling results informed the field demonstration test plans, which outline load variations the modeling found to yield optimal savings, and these load variations will be tested throughout the duration of the field tests. The program will seek to validate modeling results in the field rather than the lab, since field test plan development followed the receipt of modeling results, allowing for the opportunity to validate in a real-world application v. a simulated one, thereby providing a more accurate representation of system performance in the Northwest.
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.	Action required	Target and threshold not met. Delays in contract negotiations pushed the final report completion date to early Q2 2026.

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 2/3/2026	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	Target achieved. BetterBricks participated in nine events in Q4, including: - An exhibit booth at the Smart Buildings Exchange in Seattle - A booth at the BOMA Oregon Product and Services Expo - A booth and lighting presentation in Helena, MT at the Joint Engineers Conference BetterBricks published five new content pieces this quarter, including: - Two new luminaire level lighting controls case studies, featuring projects in Seattle and Mount Vernon, Washington - A new five-part article series was published, educating specifiers on efficient fan selection criteria and best practices
Increase BetterBricks brand awareness and audience reach.	Increase website traffic by 12% from 2024.	Increase website traffic by 8% from 2024.	On target	The new BetterBricks website soft launched in May and was formally announced to the public in late July 2025. Q4 website traffic is up 415.8% compared to Q4 2024, and up 84.1% for the entire year compared to 2024. The significant spike in Q4 traffic is in large part due to an awareness campaign, including paid static and video advertising on LinkedIn targeting building owners, property and facility managers, engineers, and architects. The campaign reintroduced commercial real estate market actors to BetterBricks tools and resources and touted the many benefits of incorporating energy efficiency into commercial buildings.

Infrastructure Programs