

Regional Portfolio Advisory Committee



DATE: Tuesday, February 10, 2026
TIME: 10:00am – 2:45pm Pacific
LOCATION: Hybrid: Puget Sound Energy (2711 Pacific Ave SE, Olympia, WA 98501) + Microsoft Teams
WEBINAR: [Click here to join the meeting](#) (Meeting ID: 247 491 608 761 50 | Passcode: 8ws76rg7)
 (if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 799 616 8 #

AGENDA (All Times Pacific)

Page #

10:00-10:25 (25 min)	Welcome, Introductions & Agenda / Packet Review	All	1-2
10:25-10:35 (10 min)	Housekeeping and Looking Ahead <ul style="list-style-type: none"> • Updates • Announcements & Reminders <ul style="list-style-type: none"> ○ May 4-5 Efficiency Exchange (Registration opens Feb 9) ○ Upcoming Meetings, Events, 2026 RPAC dates <p><i>Desired Outcome: Committee members aware of recent developments and upcoming topics for engagement.</i></p>	Alisyn Maggiora	--
10:35-10:55 (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	3
10 min	STRETCH BREAK	All	
11:05-11:25 (20 min)	Market Transformation Highlight: Hot Water Innovation Prize <ul style="list-style-type: none"> • Overview • Timing and Status Update <p><i>Desired Outcome: Committee members are aware of the project, its value to the region and how to help ensure participating products are successful in the market.</i></p>	Emily Rosenbloom	4
11:25-12:10 (45 min)	[RPAC+] Heat Pump Water Heater (HPWH) Marketing Campaigns <ul style="list-style-type: none"> • Recap: 2025 HPWH Consumer <i>Level Up</i> Campaign • Proposal: 2026 HPWH Consumer <i>Level Up</i> Campaign <p><i>Desired Outcome: Committee members understand the results of last year’s marketing campaign and plans for a 2026 marketing campaign.</i></p>	Britt Cutsforth Dawkins	5-6
60 min	LUNCH	All	
1:10-2:15 (65 min)	RPAC Round Robin <ul style="list-style-type: none"> • Big changes (programs/personnel) • Current challenges, lessons learned • How utility activities relate to NEEA’s • Sharable tools/materials • Policy directives w/ customers • Findings, filings, IRPs 	RPAC Members	--
2:15-2:35 (20 min)	Efficient Fans Program: Refresher & Milestone Vote Prep <ul style="list-style-type: none"> • Program Overview • What to expect for “Program Advancement” milestone (Q3) <p><i>Desired Outcome: Committee is primed on program and milestone timing and expectations. Committee questions / concerns are identified.</i></p>	Alexis Muench	7
2:35-2:45	Wrap-Up & Adjourn	Alisyn Maggiora	--

Informational Updates:

- **Page 8:** Enervee NW Online Marketplace Pilot
- **Page 9:** High-Performance HVAC (VHE DOAS) name change
- **Page 10:** Residential New Construction – New Homes Protocol
- **Page 11:** Heat Pump Water Heater Work Group Update
- **Page 12-13:** Q4/Q1 Committee Updates
- **Page 14-28:** Q4 2025 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Reference Materials:

- **Committee Meeting Materials & Charters:**

Please review the committee updates on pg.12 for a recap on recent and upcoming committee activities/topics. Links to recent meeting materials are provided there.

- Q4 2025 RPAC meeting [packet](#), [slides](#) and [notes](#)
 - Charters: [RPAC](#), [CEAC](#), [RETAC](#), [Coordinating Committees](#)
- **Latest Functional Newsletters** (Emerging Tech | Market Research & Eval | Codes, Standards, New Construction): <https://neea.org/resource-type/quarterly-updates/>

2026 RPAC MEETING DATES:

Quarter	Day(s)	Date(s)	TIME (pst)	LOCATION	KEY TOPICS / NOTES
Q1	Tuesday	Feb 10	9am-4pm	Hybrid	<ul style="list-style-type: none">• Fans program refresher• Portfolio updates (2026 plans)• HPWH marketing campaigns: 2025 results & 2026 proposal
Q2	Tuesday	May 19	9am-4pm	Virtual	<ul style="list-style-type: none">• Annual Portfolio Review (savings + risk)• Fans deep dive (vote prep)• HPWH 2026 marketing campaign <i>*elections*</i>
Q3	Tuesday	Sept 1	9am-4pm	Virtual	<ul style="list-style-type: none">• Fans <i>*vote*</i>
Q4	Tuesday	Nov 3	9am-4pm	Virtual	Need to check on Monday Nov 2

Memorandum – *Agenda item (Tier 1)*



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
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 electric portfolio 2026 goals and focus areas to the RPAC meeting.

Brief Summary of Discussion Topics

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 electric portfolio from the [2026 Operations Plan \(p 14\)](#) include:

- Increase regional adoption of heat pump water heaters through engagement with Northwest utilities and national stakeholders to ensure sustained adoption and support for the federal standard in the long term.
- Increase market share of ENERGY STAR v 9.1 TVs through a new incentive strategy via ENERGY STAR Retail Products Platform and promotion with retail partners.
- Enhance interventions with Hydraulic Institute and pump manufacturers to market smart pumps and make the Energy Rating label more useful to pump buyers and specifiers.
- Develop a strategy for the expansion of XMP – Pumps program to additional pump market segments and other clean water pump types not covered by DOE’s Pump Energy Index and standard.
- Continue testing and refining interventions for the Efficient Fans program, with an eye toward entering the market development phase of NEEA’s initiative lifecycle via a Regional Portfolio Advisory Committee vote in 2026.
- Launch Phase 2 of the Northwest Marketplace pilot to test out some additional functionality of the platform and further develop the value proposition for Northwest utilities.

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

Memorandum – *Agenda item (Tier 1)*



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Rosenbloom, Manager, Program Management & Heat Pump Water Heater Program Strategy

SUBJECT: Market Transformation Highlight: Hot Water Innovation Prize

Our Ask of You:

Please read the overview below about the Hot Water Innovation Prize and come ready to hear more details of the project, its value to the region and how your organization can help ensure participating products are successful in the market. You can also access additional information [here](#).

Brief Overview:

The Hot Water Innovation Prize (HWIP) is a national competition accelerating the development of compact split-system heat pump water heaters (HPWHs) designed for homes where standard HPWHs do not fit. These systems pair an indoor tank with an outdoor compressor, enabling high-efficiency water heating in space-constrained single-family and multifamily buildings common throughout the Northwest.

The goal is to bring to market affordable, installation-ready products that expand efficiency benefits to households currently limited to small electric resistance water heaters.

We are now in the third and final phase of the Hot Water Innovation Prize, with prototype testing currently underway at the lab. This phase focuses on evaluating system performance, installation readiness, cost, and real-world feasibility as we move toward selecting the final winner(s). Winner(s) will be announced at an industry event later in 2026.

As part of the prize awarded to the winning product, we're inviting utilities, energy-efficiency organizations, nonprofits, and industry partners nationwide to join the coalition and help bring the winning split-system product to market. Partners support this effort by hosting real-world demonstration projects, amplifying prize updates as Media Co-sponsors, and integrating the winning technology into new or existing water-heating programs.

Please contact [Emily Rosenbloom](mailto:erosenbloom@neea.org) (erosenbloom@neea.org) if you have questions.

Memorandum – *Agenda item (Tier 1)*



UPDATED: February 9, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Britt Cutsforth Dawkins, Senior Manager, Marketing Strategy

SUBJECT: 2025 Heat Pump Water Heater (HPWH) *Level Up* Campaign Results and Proposed 2026 HPWH Campaign

Our Ask of You:

Review the summary information below and join the RPAC/RPAC+ meeting on February 10 to hear about 1) the performance of the 2025 HPWH *Level Up* campaign results and 2) the proposed 2026 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 continue to raise consumer awareness and increase consideration of HPWHs across the region. The 2024 and 2025 campaigns were a success, resulting in a combined 50 million impressions across the target audience and more than 320,000 site sessions to the *Level Up* campaign landing page.

Given the positive response to the 2024 and 2025 campaigns, NEEA staff proposes running it again in 2026. Following the Q1 RPAC meeting, NEEA staff will send details about the proposed 2026 campaign. RPAC members will have the opportunity to review the proposed optimizations 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 Q2 2026 RPAC meeting on May 19.

2025 Campaign Results:

After the first run of the *Level Up* campaign, NEEA staff recommended optimizations—testing new secondary messaging, expanding audience reach with new marketing channels, and developing Spanish-language ads and landing page—that were approved the RPAC/RPAC+ members in 2025. These changes had a notable impact on the campaign.

The 2025 campaign drove more than 182,000 site sessions on the Hot Water Solutions website, representing a 30% increase over the 2024 campaign. The 2024 and 2025 campaigns had the same media budget, and optimizations applied to the 2025 campaign resulted in higher traffic at a 50% lower cost per click. This campaign has four main takeaways that will inform the HPWH program’s marketing strategy and messaging, as well as the proposed 2026 consumer marketing campaign:

TAKEAWAY: We see increasing interest in HPWH ad content from 2024 to 2025, and areas with historically low adoption continue to respond well.

Response to the 2025 *Level Up* campaign was again stronger than expected, indicating a continued increase in HPWH interest across the region. On Facebook/Instagram, while urban audiences showed higher average engagement—given the known pre-existing awareness of HPWH in urban areas—the campaign saw a stronger aggregate click through rate (CTR) of 1.46%, up from 1.34% in 2024. Display ads performed steadily across creative themes, geographies, and languages.

TAKEAWAY: As theorized in 2024, expanding our marketing channels in 2025 allowed us to reach and drive engagement with new audiences.

The age distribution of those who engaged with the 2024 ads suggested an older demographic was interested in learning about HPWHs and able to make improvements to their homes. In 2025, we proposed and ran placements on Nextdoor, which delivered well above benchmark engagement across the Northwest for both urban and rural consumers. To ensure we reached and increased awareness with younger consumers, we ran audio ads on digital channels, which delivered more than 2.41 million completed listens.

TAKEAWAY: Expanding the campaign with Spanish ads ensured we reached Spanish-speaking consumers—and helped identify where we can further optimize messaging and ad spend.

Spanish language placements frequently matched or exceeded English CTRs, particularly in display advertising, demonstrating strong engagement efficiency even with a lower overall spend.

TAKEAWAY: Message testing in 2025 both reinforced previous results and brought new insights.

On Facebook and Instagram, the You Win! headline imagery delivered the strongest engagement among the 2025 English awareness ads, as it did in 2024. Spanish-speaking audiences preferred ¡Triunfa! (Score!) very slightly over the ¡Sales Ganando! (You Win) image.

Updated 2/9 In terms of the (secondary) messaging, the new reducing energy waste message performed best with English audiences in both awareness and retargeting or conversion ads, followed by the general HPWH efficiency/ENERGY STAR® copy that was most effective in 2024.

Updated 2/9 Spanish-speaking audiences engaged most frequently with the general HPWH efficiency/ENERGY STAR® messaging, and environmental messaging in the conversion ads. The DIY installation messaging resulted in average CTRs in both English and Spanish ads.

Nextdoor users demonstrated different behavior, finding the environmental messaging most compelling, followed by HPWH technology and reducing energy waste.

2026 Campaign Overview:

Given the positive response to the 2025 Level Up regional campaign, NEEA staff recommends optimizing it further and re-running it in 2026. The campaign awareness and consideration strategies remain the same as in 2024 and 2025, but slight tweaks to targeting media channels are recommended to sharpen focus.

The popular 8-bit gaming creative, broad Northwest targeting, campaign duration would remain the same as in the previous *Level Up* campaign, and the media spend would be slightly decreased. The proposed timing for this year's campaign is Q2 2026 and Q3 2026.

Next Steps:

NEEA staff will follow up in early April with additional detail on the proposed 2026 *Level Up* campaign.

Please contact **Britt Cutsforth Dawkins** (bdawkins@neea.org) if you have questions about the 2025 HPWH *Level Up* campaign results or if you would benefit from a 1:1 discussion about the proposed 2026 campaign in advance of the Q2 2026 RPAC meeting.

Memorandum – Agenda item (Tier 1)



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Alexis Muench, Program Manager
SUBJECT: Efficient Fans Program Update and Tee-Up for planned Q3 Milestone Vote

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Our Ask of You:

In the Q1 meeting, the Efficient Fans Program team will provide a high-level overview of the program and plan for Program Advancement to Market Development. Please bring any questions you have related to the Efficient Fans program to the RPAC meeting.

Brief Overview:

At the upcoming RPAC meeting, NEEA staff will provide a high-level overview of the Efficient Fans program and preview its readiness for Program Advancement into Market Development. This overview is intended to ensure RPAC has a shared understanding of the program’s focus, rationale, and trajectory ahead of the anticipated milestone review and vote.

As a reminder, the Efficient Fans program entered the portfolio and began Program Development in 2022. The program focuses on commercial and industrial fans, and standalone Fan Energy Index (FEI)-certified fans not part of an efficiency-rated packaged piece of equipment, such as exhaust, custom air-handling, and industrial process equipment. The program aims to work with manufacturers, manufacturer representatives, and specifiers to leverage the FEI as a tool to increase sales of efficient fans and educate the market on the advantages of efficient fan systems.

In Program Development, the team has focused on conducting research to better understand market barriers to efficient fan adoption, partnering with manufacturers and reps to analyze data and test interventions to promote FE via their fan selection software, and refining the market transformation (MT) theory and intervention strategies.

In the meeting, NEEA staff will review the program’s Market Transformation (MT) theory, including the rationale for targeting upstream market actors and the role of FEI in differentiating performance. Staff will also clarify the product definition and scope, including the types of fan products and their common applications. Lastly, staff will also review the remaining Program Development activities and timeline for the anticipated milestone vote.

Please contact [Alexis Muench](#) if you have questions about this memo.

PROGRAM LIFECYCLE STATUS



Memorandum – Informational item (Tier 2)

February 3, 2026



TO: Regional Portfolio Advisory Committee (RPAC)

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 RPAC 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 to be launched in Q1.

Memorandum – *Informational (Tier 2)*



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Dave Hammond, Senior Program Manager for High-Performance HVAC
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 High-Performance HVAC program (using the Very High Efficiency DOAS system) and the gas-funded Efficient RTUs program are planning to update their names to Advanced Performance DOAS & Advanced Performance RTUs, 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 “High Performance HVAC” – National Comfort Institute, “Very High Efficiency HVAC” – Institute for Market Transformation and “Efficient Rooftop Units” – CalMTA.
- **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 High-Performance HVAC Market Progress Evaluation Report #1 that found HVAC system designers recognize the VHE DOAS design strategies but are not familiar with the actual terminology of “VHE DOAS”.
- **Desired alignment between programs** – Currently, the High-Performance HVAC program and Efficient RTUs 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 will begin 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, RPAC members are invited to reach out with any feedback or questions regarding this planned update.

Please contact [Dave Hammond \(dhammond@neea.org\)](mailto:dhammond@neea.org) if you have questions about the **High-Performance HVAC** program name update.

Memorandum – *Informational (Tier 2)*



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Mark Rehley, Director NEEA’s Codes, Standards, New Construction, and ET
SUBJECT: Residential New Homes Protocol

Our Ask of You:

Please review the memo and bring any questions, recommendations, or feedback to the Q1 2026 RPAC meeting or contact me at the email below.

Brief Overview:

In the last quarter (Q4 2025), the Regional Technical Forum’s (RTF) New Homes Standard Protocol did not undergo a substantive technical update as originally expected. Instead, it received an administrative extension to allow more time for the major overhaul currently in development. On December 9, 2025, the RTF voted to extend the "sunset date" of the current New Homes Standard Protocol. This action was taken in response to feedback from a November 4, 2025, New Homes Subcommittee meeting. This update is expected to involve complex changes—likely aligning the baseline with the 2021/2024 International Energy Conservation Code (IECC) or recent state code shifts—which required more time than the original end-of-year deadline permitted.

The updated New Homes Standard Protocol is targeted for a vote in April 2026.

Please contact [Mark Rehley](#) if you have questions about NEEA’s Residential New Construction efforts or the Regional Technical Forum’s (RTF) New Homes Protocol.

Memorandum – *Informational item (Tier 2)*



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Alex Merrill, Program Manager, Heat Pump Water Heaters
SUBJECT: Heat Pump Water Heater work group update

Our Ask of You:

Please review the update below and reach out with any questions or feedback you have. Thank you to those who helped assign a representative(s) from your organization.

Brief Update:

NEEA staff are preparing to launch the Heat Pump Water Heater (HPWH) work group in Q1 to convene the region and identify opportunities to focus and amplify our collective regional resources and efforts to increase adoption of HPWH. This work group will develop a roadmap of actionable steps for the region to consider and adopt as appropriate based on assessed gaps and needs.

Work group members from 12 utilities have confirmed their participation and are participating in pre-meeting interviews. The meeting schedule is currently being finalized, with the first work group meeting anticipated in March and up to two meetings per quarter with a focus on Q2 and Q3.

Program Context (Why HPWH, Why Now?):

In May 2024, the U.S. DOE finalized a federal standard requiring most electric storage water heaters to transition to heat pump technology by 2029. The standard is key to the region realizing the significant energy savings potential that this technology offers.

It is a critical time for deeper regional collaboration to help ready the market for this shift. Therefore, a goal in the HPWH program Operations Plan is to “Deepen engagement with local stakeholders to accelerate adoption and impact,” with the goal to conduct at least four new collaborations with regional stakeholders.

NEEA staff believe convening a funder work group is essential for meeting this goal, as developing strategies that increase short-term energy savings and support long-term HPWH adoption and compliance with the new federal standard will require focused work sessions.

RPAC Context:

As a reminder, work groups are formed by RPAC on an as-needed basis and staffed with as-needed expertise, for a limited term and specific purpose that is distinct from that of RPAC and the Coordinating Committees.

Please contact [Alex Merrill amerill@neea.org](mailto:amerill@neea.org) if you have questions about the Heat Pump Water Heater work group.

Memorandum – Informational Update (Tier 2)



February 3, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Anouksha Gardner, Stakeholder Relations Manager (Coordinating Committees)
Mark Rehley, Director, Codes, Standards, New Construction, & Emerging Tech (RETAC)
Jonathan Belais, Policy Manager (CEAC)

SUBJECT: Update on recent committee meetings (Q4 2025 / Q1 2026)

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.

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](#). As a reminder, the coordinating committees skip Q3 and only meet three times a year.

In the Q1 2026 hybrid CICC meeting on day 1 (February 25) the committee will hear about the High-Performance HVAC regional priority topic *Developing messaging regarding program benefits to target building owners and facility/operations staff* facilitated by NEEA Sr. Program Manager Dave Hammond and engage in a regional roundtable discussion on organization and program updates. On day 2 (February 26), committee members will hear from the *Hydraulic Institute (HI)* and get an update on their efforts to promote energy efficient pumping facilitated by NEEA Sr. Program Manager Warren Fish as part of the Motor Driven Products Pumps & Circulators and also get *program updates* on Efficient Fans, presented by Senior Market Transformation Manager Nick Michel. For a recap on Q4 2025 meeting notes, slides and agenda packet please visit our website [here](#).

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](#). As a reminder, the coordinating committees skip Q3 and only meet three times a year.

In the Q1 2026 hybrid RCC meeting, on day 1 (March 17) the committee will receive a shareout from the Heat Pump Water Heater team on *highlights from Market Progress Evaluation Report (MPER) 8 and program next steps* and engage in a regional roundtable discussion on organization and program updates. On day 2 (March 18), committee members will participate in a coordination opportunity and focus on the topic *Continuing to build regional alignment on a new RTF HP measure development* facilitated by NEEA Senior Program Manager Suzi Asmus as a part of the regional priority topic for the program Advanced Heat Pumps and get an update on

the *NW Online Marketplace*. For a recap on Q4 2025 meeting notes, slides and agenda packet please visit our website [here](#).

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

Regional Emerging Technology Advisory Committee (RETAC):

At the Q4 RETAC meeting, Keshmira McVey (Engineer with BPA) and Adam Gage (NEEA) reviewed regional efforts to test and promote central commercial heat pump water heaters. Then Kenji Spielman with Energy Trust provided an overview of Energy Trust's emerging technology research areas and new measure development efforts. Finally, Ramin Faramazi and Dr. Jason Woods with the National Lab of the Rockies provided an in-depth overview of (formally NRELs) history and current research efforts. A summary of the projects and updates are included in the notes from the meeting (link below).

The Q1 meeting is scheduled for March 11, 2026, where representatives from Pacific Northwest National Lab (PNNL) will share research priorities and lab capabilities.

Resources / reference:

- Q4 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.

Please contact [Mark Rehley](#) or [Alisyn Maggiora](#) with any questions about the RETAC.

Cost-Effectiveness & Evaluation Advisory Committee (CEAC):

The Q4 2025 meeting was held on October 29, 2025. During this meeting, staff provided an overview of Market Research and Evaluation (MRE) activities included in the 2026 Operations Plan and shared an update on the status of the Code Baseline and Key Assumption Review. The committee reviewed findings from the Market Progress Evaluation Report (MPER) 3 for Luminaire Level Lighting Controls (LLLC) and MPER 6 for Building Energy Codes, with discussion focused on key results and implications for market progress tracking. Staff also presented the Q4 2025 Key Assumptions Update and addressed committee questions related to recent updates and planning assumptions. The meeting concluded with the kickoff of NEEA's annual reporting process, including an overview of the committee's role and key touchpoints in preparation for 2026 reporting.

The next meeting (Q1 2026) is scheduled for February 18, 2026. During this meeting, staff will provide an overview of the annual reporting process and review upcoming Market Research and Evaluation (MRE) activities outlined in the quarterly newsletter. The committee will review findings from upcoming Market Progress Evaluation Reports, including Luminaire Level Lighting Controls and Residential Products, as well as results from the Idaho Commercial Code Compliance Evaluation. Staff will also present updates to key assumptions, including updates related to commercial codes and residential products baselines, and respond to committee questions.

Recent meeting materials linked below:

- Q4 2025 Cost Effectiveness and Evaluation Advisory Committee [slides](#) and [packet](#)

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

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		
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	
Consumer Products Product Group	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

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. Recommendations will be based on organizations that: <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
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HVAC Product Group	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.	

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
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).

HVAC Product Group

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

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