

Q1 2026: Tuesday, February 10

10:00am-2:45pm Pacific

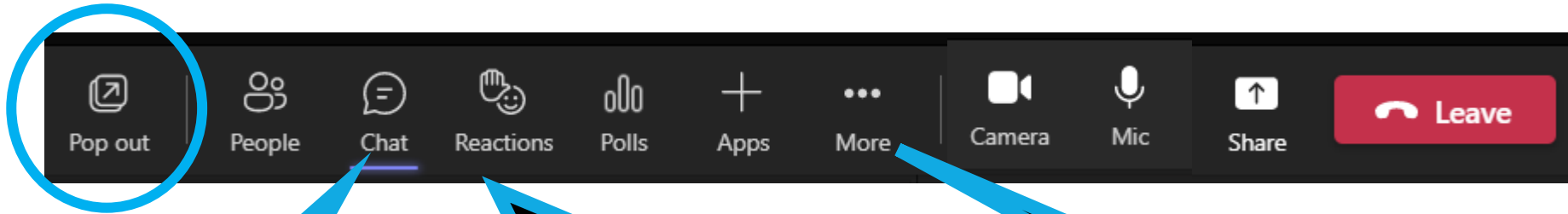
Hybrid @ PSE (Olympia)

Regional Portfolio Advisory Committee



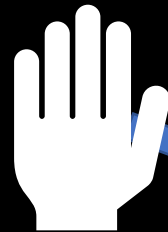


Tools for Today: Engaging on Teams



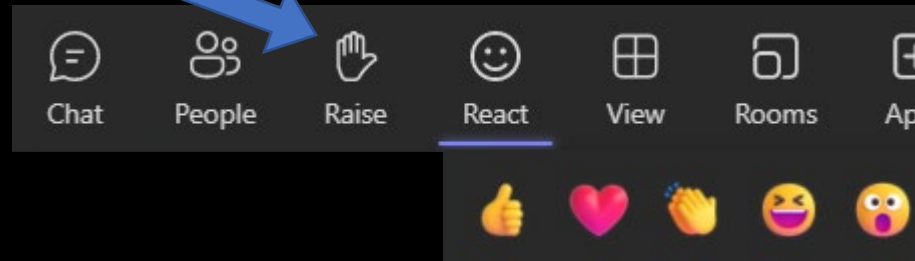
The chat is not captured automatically.

Do you have any accessibility challenges with this technology today?



Comments/Questions?

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



“...” More includes:

- ✓ Settings: mic & video
- ✓ Background effects

Heads Up!

*“Spotlighting”
Speakers*





Reminder of RPAC Purpose & Role



Purpose

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



Responsibilities

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



Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



xx?

Introductions

- Name
- Organization
- *And...*



Packet Review & Informational Updates

Tier 1: Agenda Items

- ✓ *Portfolio Update (pg. 3)*
- ✓ *MT Highlight: Hot Water Innovation Prize (pg. 4)*
- ✓ *HPWH Marketing Campaign (pg. 5)*
- ✓ *Efficient Fans Refresher & Milestone Prep (pg. 7)*

Tier 2: Informational Updates

- ✓ *Enervue NW Online Marketplace (pg. 8)*
- ✓ *High-Performance HVAC Name Change (pg. 9)*
- ✓ *Res New Construction – New Homes Protocol (pg. 10)*
- ✓ *HPWH Work Group (pg. 11)*
- ✓ *xx*

Tier 3: Additional Resources (pg. 2)

Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



Housekeeping & Looking Ahead

Housekeeping

- *Updates*
 - ✓ Check in on Info Memos
- *Announcements & Reminders*
 - ✓ Next NEEA / MT 101 webinar
 - ✓ Efficiency Exchange 2026
 - ✓ 2026 NEEA Meetings
 - ✓ Other regional / industry events



Quick check-in: Informational Memos

- NW Online Marketplace
- HPWH Work Group Update
- Res New Construction: New Homes Protocol (RTF Measure Update)
- High-Performance HVAC (VHE DOAS) name change





Could others in your organization benefit from a NEEA / MT 101?

- Offering 2x/year 90 min webinar for alliance members
- Target audience:
 - Committee members wanting a refresher
 - Team members not on NEEA committees, but interact with NEEA's work or would benefit from a basic overview
- **Next session: Tues Mar 31, 9-10:30**
- Proposed special topic feature: Emerging Tech
 - Future special topics include: Codes & Standards, Regional Studies & Infrastructure, Market Research/Evaluation, Data Acquisition, MT Barrier Removal, Special Projects
- Contact: Alisyn Maggiora



Efficiency Exchange 2026 (EFX26)

Early Bird Registration

February 9 – April 3

neea.org/EFX

EFX26 In-person Conference

May 5-6 in Boise, ID

*Preconference tours and
networking on May 4*



Upcoming 2026 Committee Meetings

| Wednesday February 18 |

- **Cost Effectiveness Adv. Cmtee.**

| Wed / Thurs February 25-26 |

- **C&I Coordinating Committee**

| Wednesday March 3 |

- **Natural Gas Advisory Committee**



| Wednesday March 11 |

- **Regional Emerging Tech Adv. Cmtee.**

| Tues / Wed March 17-18 |

- **Residential Coordinating Committee**

2026 RPAC Meeting Dates

Quarter	Day(s)	Date(s)	Format
Q1	Tuesday	Feb 10	Hybrid @ NEEA or utility 
Q2	Tuesday	May 19	Virtual
Q3	Tuesday	Sept 1	Virtual
Q4	Tuesday	Nov 3	Hybrid (TBD) @ NEEA or utility 



= Proposed Hybrid / In-person Option

***Other regional /
industry events
or
announcements?***



Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



Portfolio Update: Look Back, Look Ahead

Emily Moore

Director, Market Strategy & Execution



**Memo
pg. xx**



2025 Market Progress highlights

- 1. Regional market share of HPWH nearing 20%*
- 2. Partnership with two major retailers on ENERGY STAR TV marketing campaigns*
- 3. Smart pumps and circulators market share exceeding 20%*
- 4. NEEA influence on national specifications for residential heat pumps*
- 5. LLC year-over-year growth and strong product awareness*

Look Ahead

2026 Operations Plan Goals and Focus Areas

- Increase regional adoption of HPWH through regional and national engagement
- Increase market share of ENERGY STAR v9.1 TVs
- Expand reach and breadth of Pumps program
- Advance Efficient Fans program to Market Development
- Launch Phase 2 of online Northwest Market place

Look Ahead

Potential 2026 Program Advancements

- Efficient Fans advancement to Market Development
- Adding gas high-efficiency DOAS to existing electric High-Performance HVAC program
 - Gas portfolio advancement decision for the Natural Gas Advisory Committee

Thank You!



Emily Moore

Director, Market Strategy & Execution

emoore@neea.org



Stretch Break!
Please return by
11:05 Pacific

Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn

Hot Water Innovation Prize: Contest Update

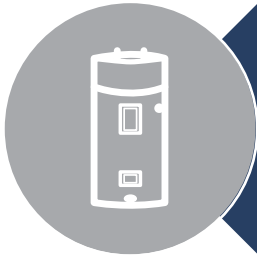
Emily Rosenbloom, Manager Program Management

RPAC Q! Meeting February 10th, 2026

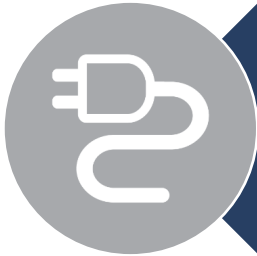
Why : Hot Water Innovation Prize



Updated Consumer Water Heating Standard – NAECA 4



In 2029, heat pumps will be required for most electric storage water heaters



Water heaters ≤ 35 gallons with low and very low draw patterns will be allowed to remain electric resistance



For practical reasons, integrated heat pump water heaters (HPWHs) < 51 gallon FHR can be challenging to install in certain space-constrained locations (e.g., multifamily and small housing units)

In-dwelling Electric Water Heaters and Housing Types

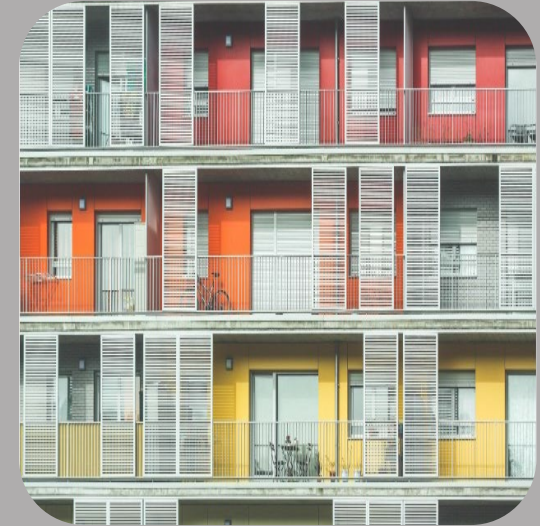


Single Family



Manufactured

**2029 Mandatory Federal Standards
Typically Require HPWH**



Low-rise Multifamily

**Water Heaters
Remain Electric
Resistance in 2029**

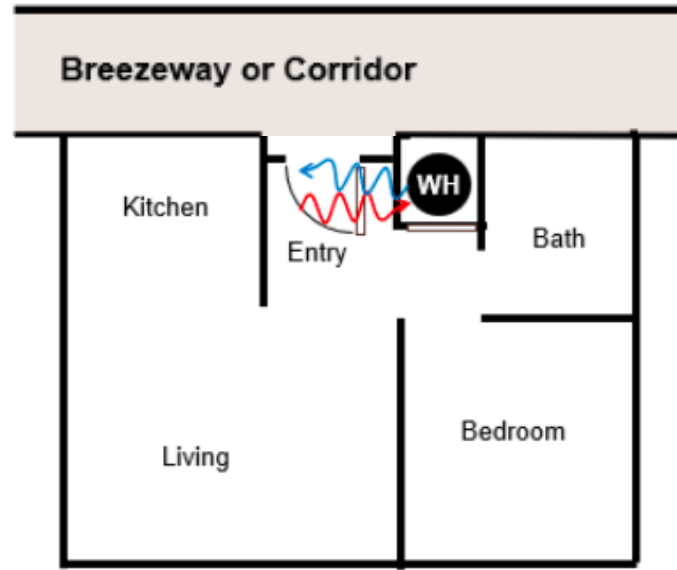
Integrated HPWH Challenges in Multifamily Buildings



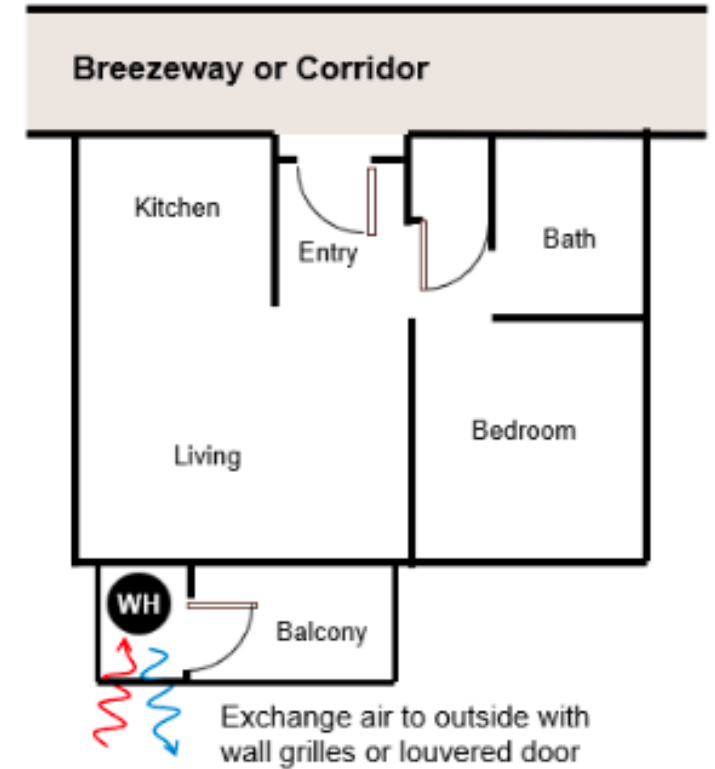
NEEA Convened a Design Charette



Interior closet



Exterior closet



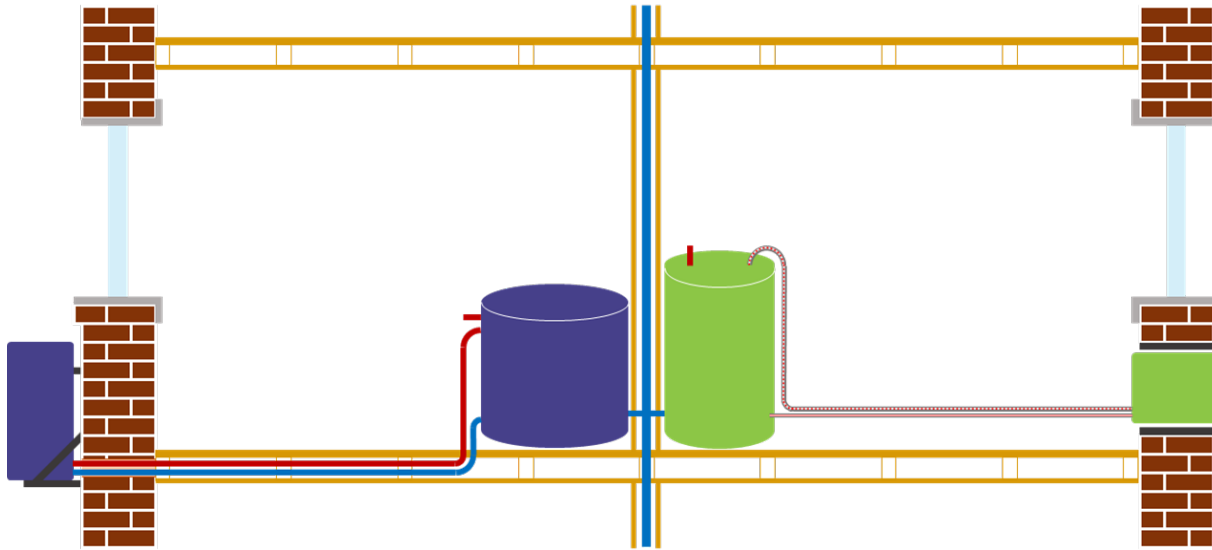
Participants: 12 industry professionals including architects, mechanical designers, and installation contractors

<https://neea.org/resources/heat-pump-water-heaters-in-multifamily-new-construction-design-charrette-findings>

What is the Hot Water Innovation Prize

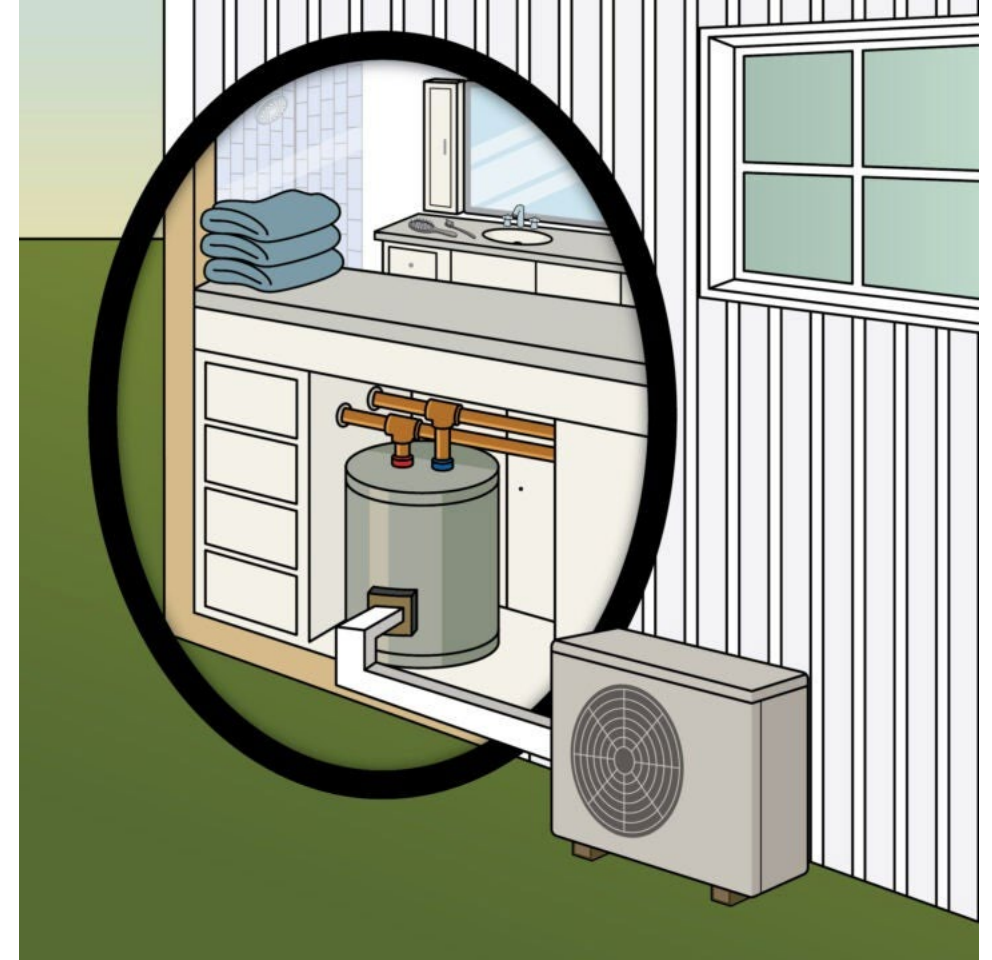


The Solution



A Split System Heat Pump Water Heater

Widely Available & Affordable



Contest Timeline, Funding, and Participation Limits

Phase A: Participant Qualification

60 Days:
Q3–Q4 2024

\$0

No Limit

Phase B: Project Plan Submission

70 days:
Q4 2024–Q1
2025

\$30k

Up to 5
products

Phase C: Prototype Submission

10 months:
Q4 2025–
Q1 2026

\$175k

Up to 2
products

Winners Announced

Q3 2026–
Q1 2027



Timeline



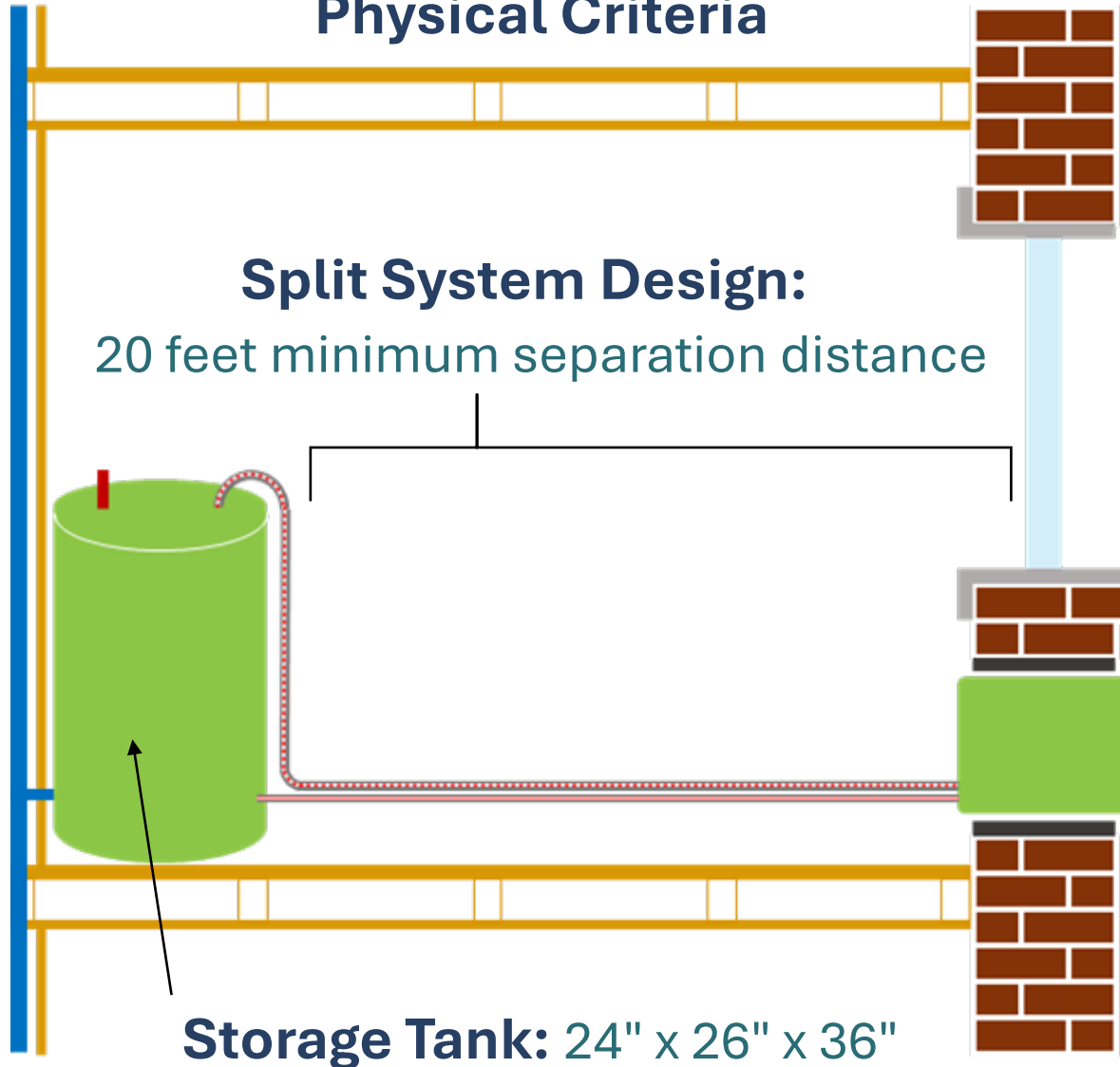
**NEEA
Support**



**Product
limit**

Phase C: Minimum Criteria for Prototype Submission

Physical Criteria



Performance Criteria

- **FHR:** ≥ 38 gallons
- **Efficiency:** UEF ≥ 2.2 ;
SCOP ≥ 2.4
- **Freeze Protection**

Phase C: Scoring Criteria for Prototype Submission



Key Criteria—200 Points

- Equipment sales price
- Ease of install



Performance Criteria—100 Points

- Cold climate operation
- Sound level
- FHR > 38 gallons
- Condensate management
- Longer separation distance
- Low maintenance
- Higher efficiency



Bonus Criteria—50 Points

- Demand response EcoPort
- Control interface
- Low refrigerant volume
- Low GWP refrigerant
- Overall prototype market readiness and other beneficial features

The Prize



Co-Sponsorships are Key To Success to Prize



Media Exposure /
Promotion



Demonstration
Projects



Utility Incentive
Programs



Current Co-Sponsors

Demonstration Project Co-sponsors



Media Co-sponsors



Contest Timeline, Funding, and Participation Limits

Phase A: Participant Qualification

60 Days:
Q3–Q4 2024

\$0

No Limit

Phase B: Project Plan Submission

70 days:
Q4 2024–Q1
2025

\$30k

Up to 5
products

Phase C: Prototype Submission

10 months:
Q4 2025–
Q1 2026

\$175k

Up to 2
products

Winners Announced

Q3 2026–
Q1 2027



Timeline



**NEEA
Support**



**Product
limit**

Innovation Prize Team



Adam Gage

Sr. Product Manager, NEEA

Emily Rosenbloom

Sr. Program Manager, NEEA

Contest Administration



ISO-17025 Certified Water Heating Lab

Media and Marketing



Technical Support



HOT WATER INNOVATION PRIZE



THANK YOU

Emily Rosenbloom, NEEA
ERosenbloom@neea.org
503.688.5440

Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



2025 Level Up Consumer Marketing Campaign Results

Britt Cutsforth Dawkins

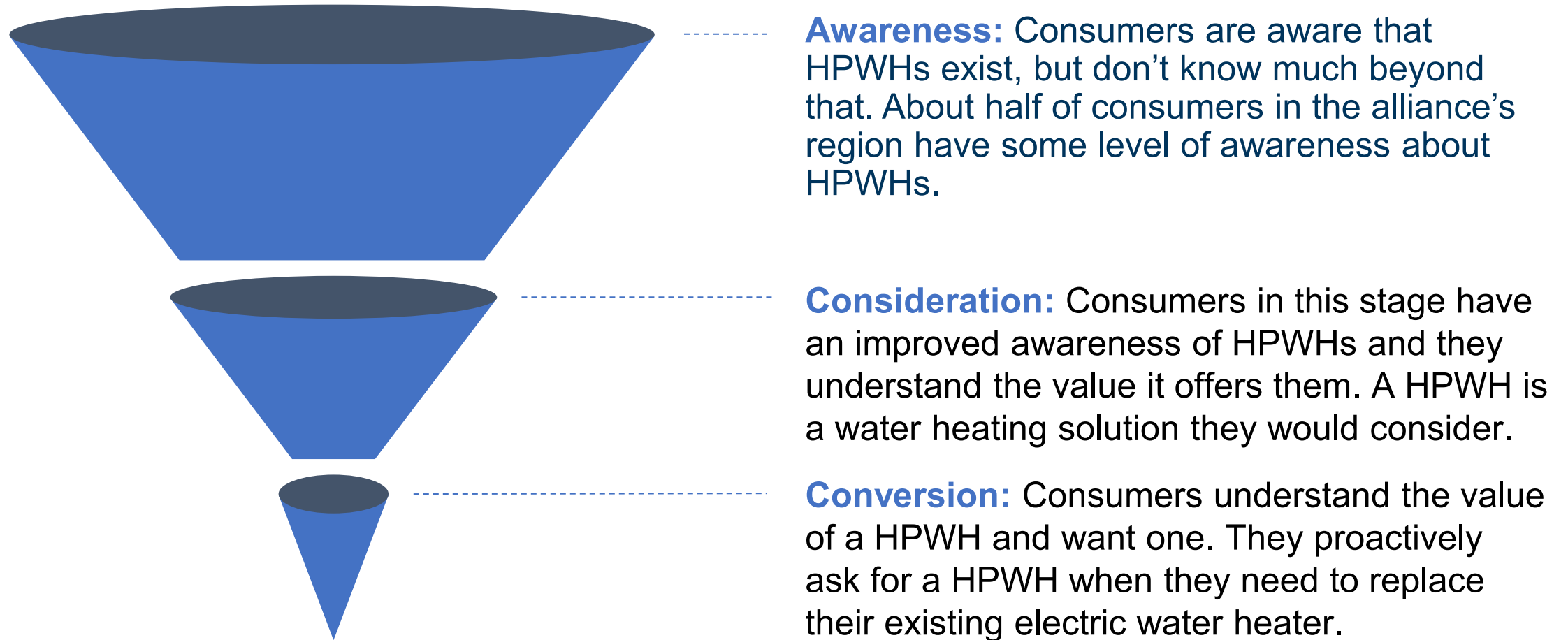
Senior Manager, Marketing Strategy, NEEA

February 10, 2026



Memo
pg. xx

Context: Marketing Funnel



2025 Campaign Strategies

To ensure the HPWH Program continues to move consumers along their journey *and ultimately drive long-term downstream demand* for HPWHs, the Level Up campaign must:

- Continue increasing consumer awareness of and consideration for HPWHs
- Educate consumers who have an existing level of awareness of the value proposition of HPWHs





***The first thing to
know:***

***The 2025 HPWH
Level Up Campaign
performed very well***

2025 Level Up Campaign: Aggregate Campaign Metrics

Metric	2024	2025
Impressions	24 million	26.5 million
Clicks	104,000	235,000
CTR	0.44%	0.89%
Site sessions	140,483	182,932
Marketing conversions	1,379	1,469

2025 Level Up Campaign Takeaways





Takeaway #1: We see increasing interest in HPWH ad content—and areas with historically low adoption continue to respond well



- **Meta (Facebook & Instagram)**

- In this consistently high-performing media channel, the campaign had a 1.46% CTR, up from 1.34% in 2024 (and 0.67% CTR in 2022!)

- **Display ads**

- CTR doubled from 0.08% in 2024 to 0.18% in 2025, and showed steady performance across creative themes, languages, and geographies
- Rural consumers are highly engaged and closing the gap with urban consumers:
 - English ads: 0.16% CTR rural vs. .20% CTR urban
 - Spanish ads: 0.19% CTR rural vs. 0.21% CTR urban

Takeaway #2: Expanding our media channels allowed us to reach and drive engagement with new audiences

- **Meta (Facebook & Instagram)**
 - Expanded to include Spanish ads and targeting; still increased the CTR by 9%
- **Display ads**
 - Expanded to include Spanish ads and targeting; saw strong engagement with this new audience in this channel
- ***NEW!* Streaming audio ads**  
 - Delivered more than 2.41 million completed listens across the English and Spanish ads, with a 95.41% LTR
- ***NEW!* Nextdoor in-app ads**
 - Environmental messaging most compelling to these consumers, followed by general HPWH technology and reducing energy waste
 - Rural consumers outperformed urban consumers very slightly





Takeaway #3: Spanish ads reached and resonated with Spanish consumers—and helped identify where we can further optimize messaging and ad spend

- Spanish language placements frequently matched or exceeded English CTRs
 - This was particularly true in display advertising—demonstrating strong engagement efficiency even with a lower overall spend
- Opportunity to continue investing in additional Spanish-language media and consider modest budget increases

Takeaway #4: Message testing in 2025 reinforced previous results and brought new insights

- **Imagery**

- On Meta, “You Win!” still wins for English audiences—but both urban and rural Nextdoor users preferred “Upgrade!”
- Spanish-speaking consumers responded best to ¡Triunfa!” (“Score!”) and “Sales Ganado!” (“You Win!”) on Meta

- **Messaging**

- English Meta users were drawn to the new message around reducing energy waste, followed by efficiency
- Efficiency messaging delivered the strongest engagement among Spanish awareness ads, and environmental messaging in the consideration ads
- The DIY installation messaging resulted in average CTRs in both English and Spanish ads
- Nextdoor users engaged more frequently with the environmental copy, followed by heat pump technology and reducing energy waste



The second thing to know:

We're proposing a 2026 campaign to continue increasing awareness and consideration

Planned Timeline for Proposed 2026 HPWH Campaign

- Q1 2026
 - February 10: Propose an optimized *Level Up* consumer campaign at the Q1 RPAC/RPAC+ meeting
- Q2 2026
 - April: Deliver recommended optimizations and hold 1:1 funding utility meetings as requested
 - May 19: Hold campaign elections at the Q2 RPAC/RPAC+ meeting
 - June: Campaign launches (if approved)
- Q3 2026
 - July: Campaign concludes
 - September 1: Share campaign results at the Q3 RPAC/RPAC+ meeting

Thank You!



Britt Cutsforth Dawkins

Senior Manager, Marketing Strategy at NEEA

bdawkins@neea.org



Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



Lunch

***Please return by
1pm Pacific***

➤ *Round Robin Updates*

Focus: Organizational & program highlights

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

Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn



Initiative Lifecycle





RPAC – Q1 Fans Tee-Up

Alexis Muench

Program Manager

2.10.2026





Upcoming Market Development Vote: Efficient Fans (Q3)

- **Market Transformation Opportunity**
 - Increase awareness of efficient fans' value proposition at the point of fan selection
 - Normalize the use of FEI (Fan Energy Index) in fan selection by increasing awareness and adoption among manufacturers, reps, and specifiers
 - Build market evidence to support durable, standards-based efficiency improvement
- **Regional savings:** 78 aMW Commercial 83 aMW Industrial (Technical Achievable Potential)

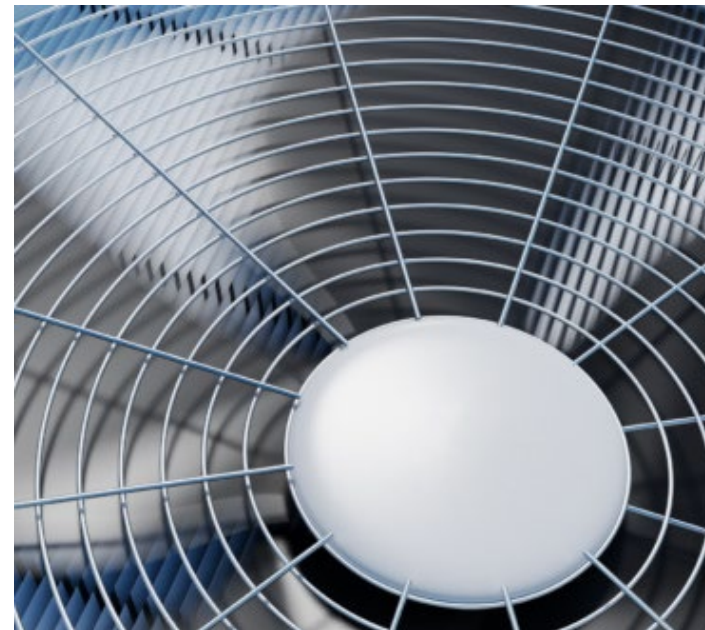




Efficient Fans Product Definition

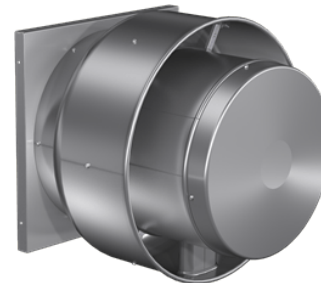
- “Efficient Fans” includes:
 - Fan systems (fan + motor + drive)

Definition -- A standalone
FEL-certified fan not part of
an efficiency-rated packaged
piece of equipment.



Common Applications

- Commercial – Building exhaust and supply, garage ventilation
- Industrial – Process exhaust, product drying, dust collection, general manufacturing
- New construction and planned replacement are majority of fans installed
- Examples: roof-mounted, inline tube axial, wall-mounted, mixed flow



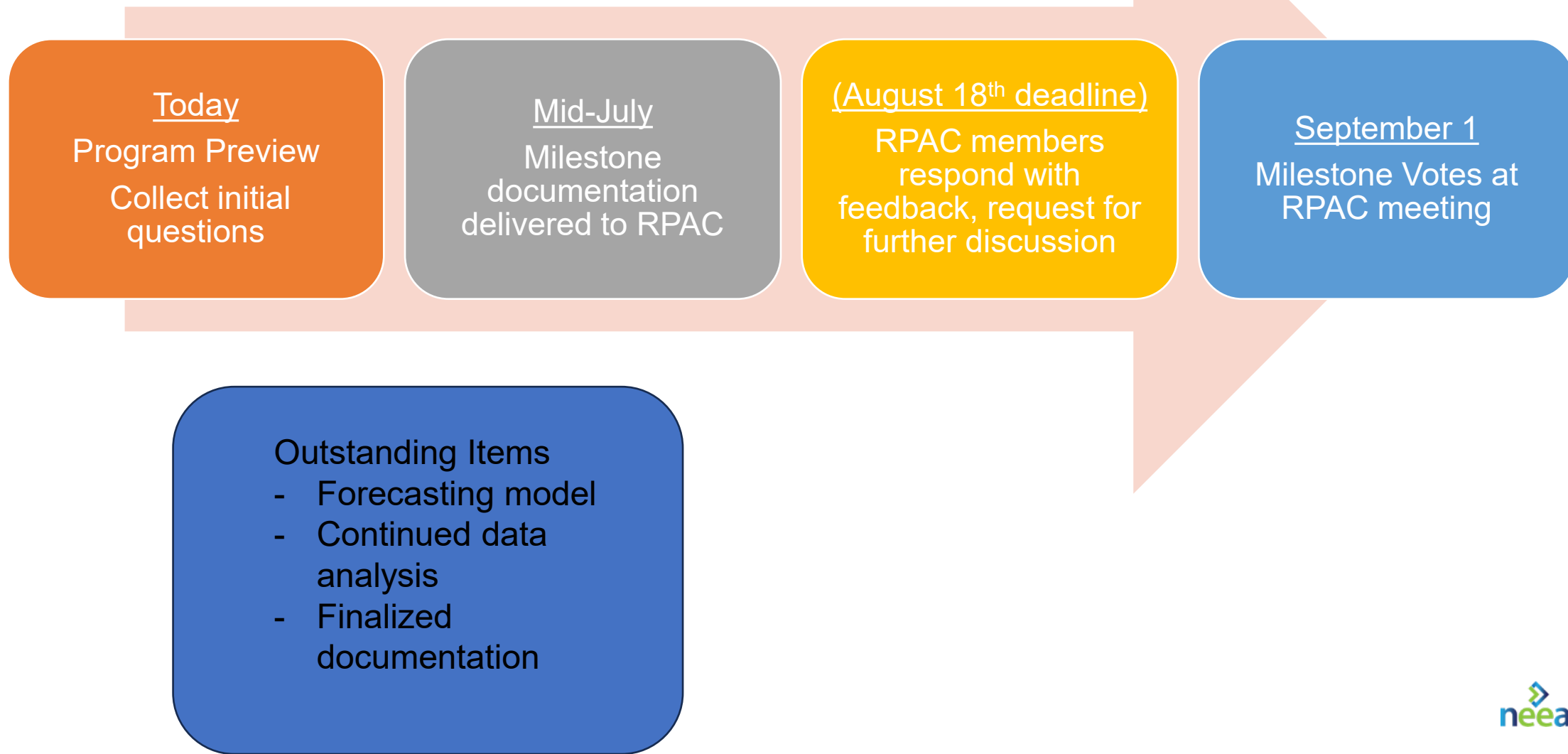


Market Transformation Theory

- **Low awareness of the fan energy index (FEI) metric**
 - **Partner with leading manufacturers** continue to optimize fan selection software to highlight FEI and develop a compelling value proposition for efficient fans.
 - **Engage with manufacturer reps** to increase FEI awareness and prioritize efficient fan sales
 - **Educate specifiers and installers** on the benefits of efficient fans.
- Raise the minimum FEI available in the market
- Increase in fan efficiency – 25% higher than the baseline by 2041



Preparing for Q3 RPAC Votes



Thank You!



Alexis Muench

Program Manager

amuench@neea.org



Agenda

All Times Pacific

10:00-10:25	Welcome, Introductions & Agenda / Packet Review
10:25-10:35	Housekeeping and Looking Ahead
10:35-10:55	Portfolio Update
10 min	<i>STRETCH BREAK</i>
11:05-11:25	Market Transformation Highlight: Heat Pump Water Heater (HPWH) Innovation Prize
11:25-12:10	HPWH Marketing Campaigns: 2025 Results, 2026 Plans
60 min	<i>LUNCH</i>
1:10-2:15	RPAC Round Robin
2:15-2:35	Efficient Fans Program: Refresher for Planned Q3 Milestone Vote
2:35-2:45	Wrap-Up & Adjourn

A decorative graphic on the left side of the slide. It features a large, dark blue triangle pointing downwards, which contains several white, nested, right-pointing chevrons. Above this triangle is a photograph of a city skyline at sunset, with buildings and trees silhouetted against a warm, orange and yellow sky. The top left corner has a green triangle, and the top center has a light blue triangle.

Action Items / Recap / Final Qs?

- HPWH campaign huddles?
 - Deeper dive on 2026 campaign?
 - Anticipate 2027 mid-cycle check-in on “RPAC+” process

Meeting Feedback

- ❖ One thing you learned / appreciated?
- ❖ Opportunities for improvement?
- ❖ Would you like us to follow up with you on anything?





Public Comments?

Thank You!

That's a wrap RPAC! Until we meet again...

➤ **Q2 2026: Tuesday, May 19 | Virtual**

