

**Q1 2026: Tuesday, February 10**

10:00am-2:45pm Pacific

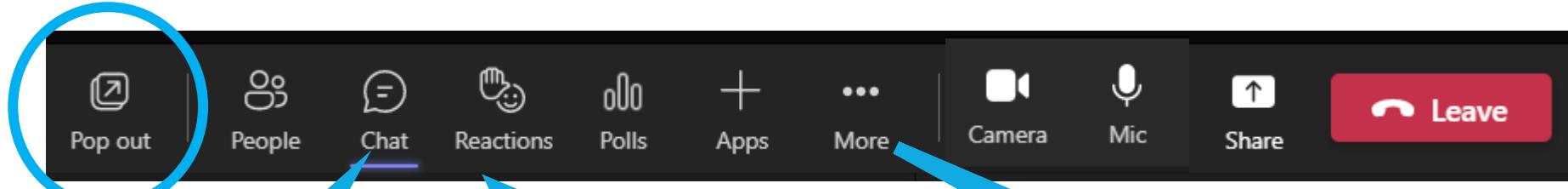
Hybrid @ PSE (Olympia)

# *Regional Portfolio Advisory Committee*





# Tools for Today: Engaging on Teams

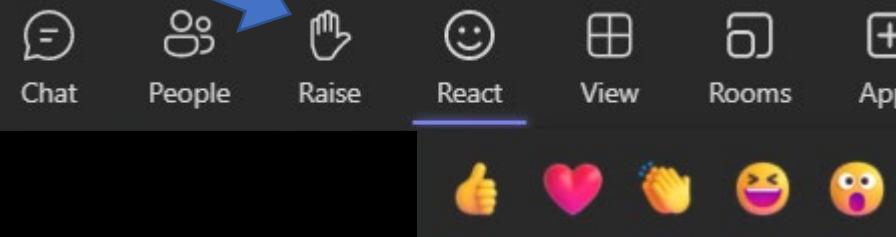


The chat is not captured automatically.

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



# Introductions

- Name
- Organization
- *And...*



xx?

# 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

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





# *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](https://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. Cmttee.

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





# *Portfolio Update: Look Back, Look Ahead*

---

**Emily Moore**

Director, Market Strategy & Execution



**Memo  
pg. xx**

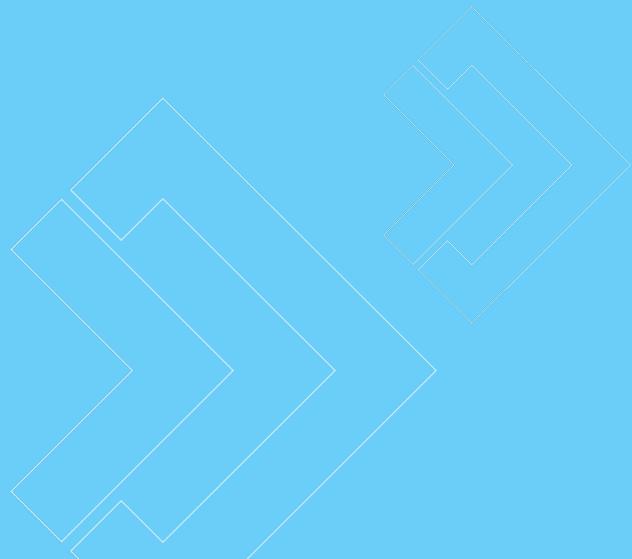


## 2025 Market Progress *highlights*

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

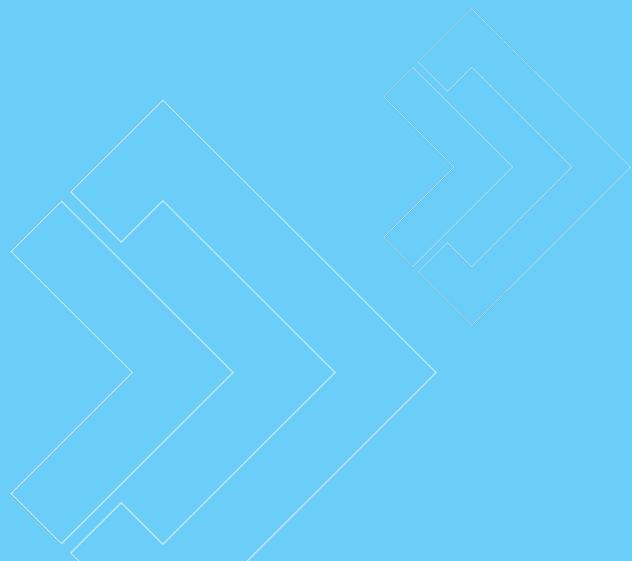
## *2026 Operations Plan Goals and Focus Areas*



- 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](mailto:emoore@neea.org)



NW Natural®



PACIFIC POWER.



Portland General  
Electric

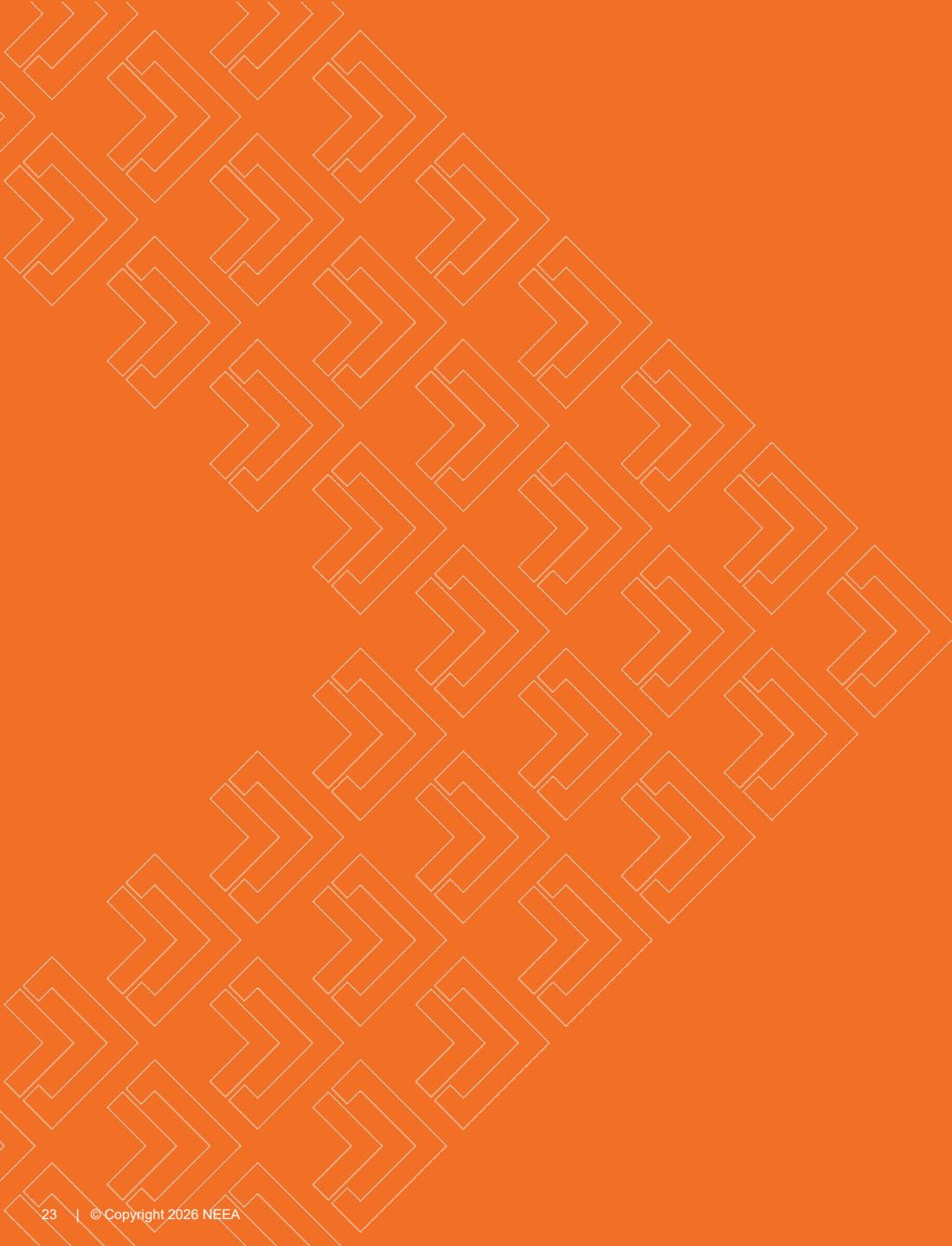


PUGET  
SOUND  
ENERGY



Seattle  
City Light





***Stretch Break!***

***Please return by  
11:05 Pacific***

# Agenda

*All Times Pacific*

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



# *Hot Water Innovation Prize: Contest Update*

Emily Rosenbloom, Manager Program Management

RPAC Q! Meeting February 10<sup>th</sup>, 2026

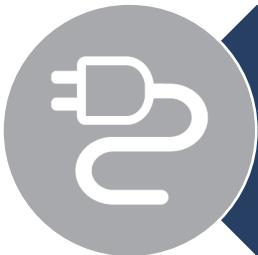
# *Why : Hot Water Innovation Prize*



## ***Updated Consumer Water Heating Standard – NAECA 4***



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



Water heaters  $\leq$  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**

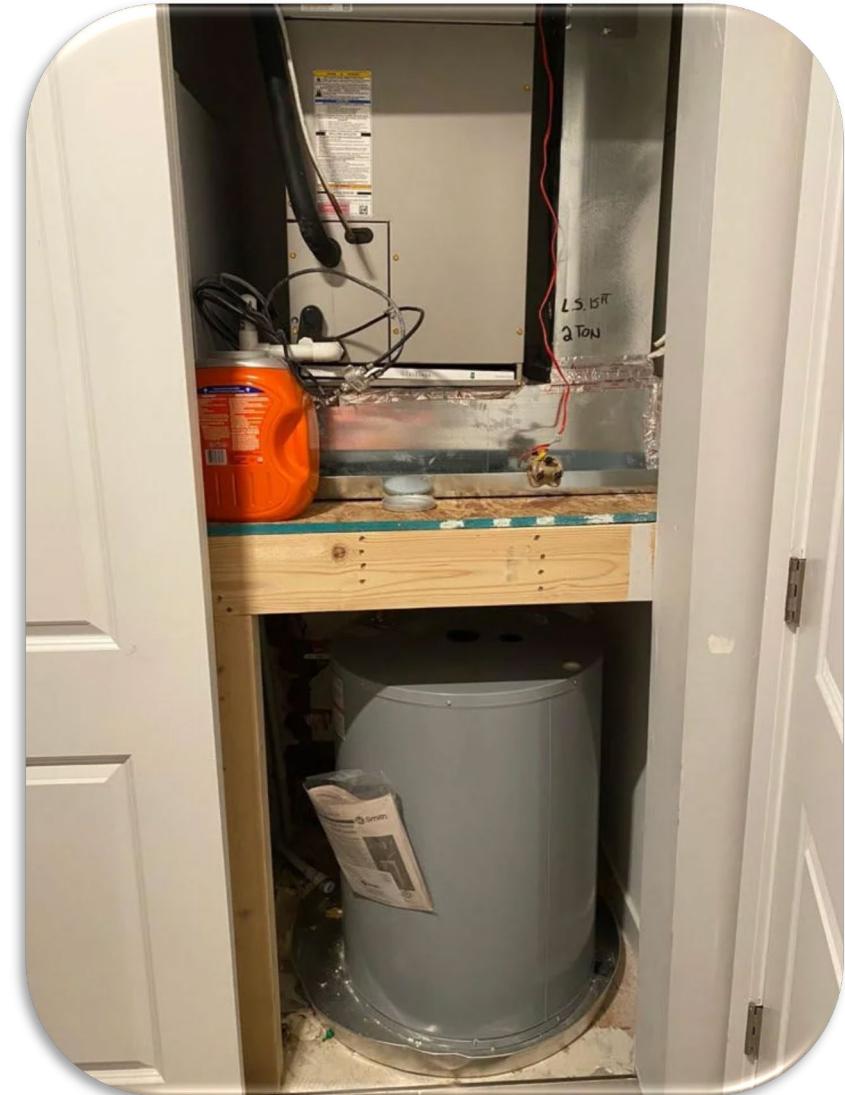
**2029 Mandatory Federal Standards  
Typically Require HPWH**



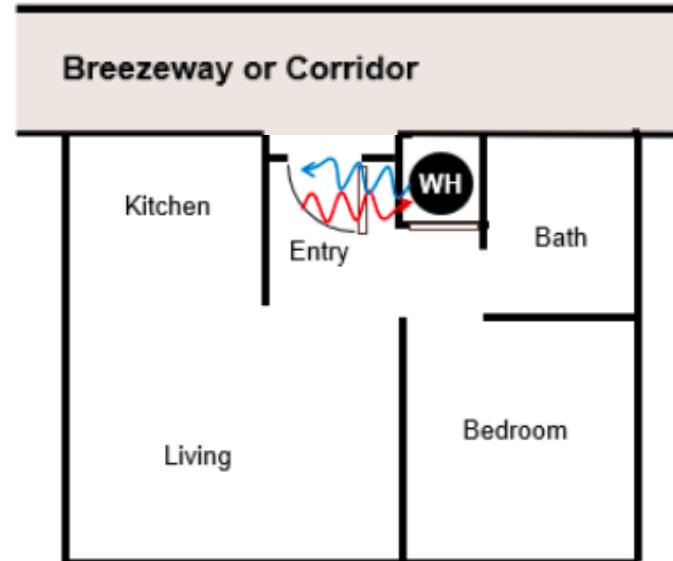
**Low-rise Multifamily**

**Water Heaters  
Remain Electric  
Resistance in 2029**

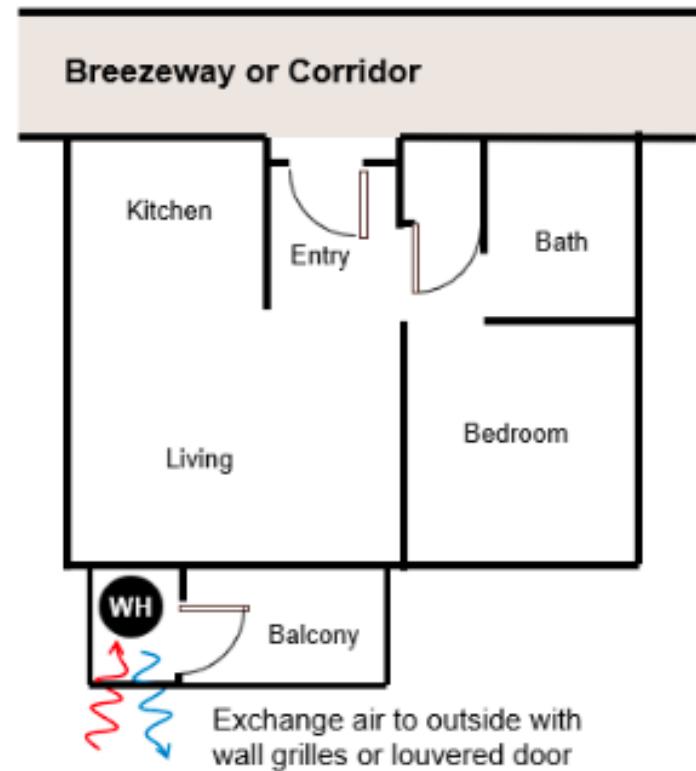
# *Integrated HPWH Challenges in Multifamily Buildings*



# NEEA Convened a *Design Charette* Interior closet



## Exterior closet



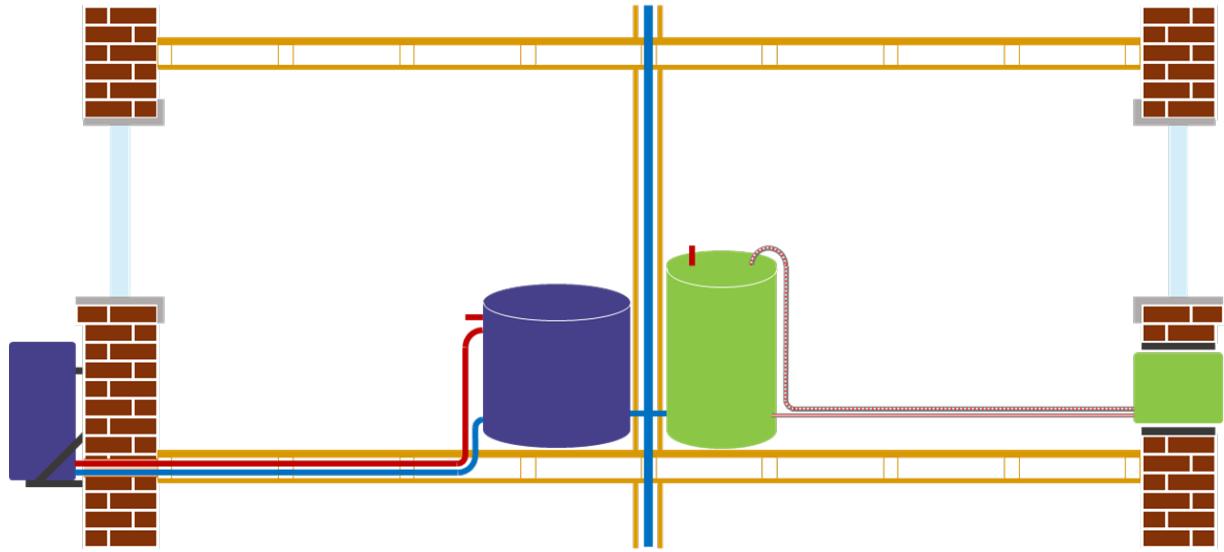
**Participants:** 12 industry professionals including architects, mechanical designers, and installation contractors

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

# *What is the Hot Water Innovation Prize*

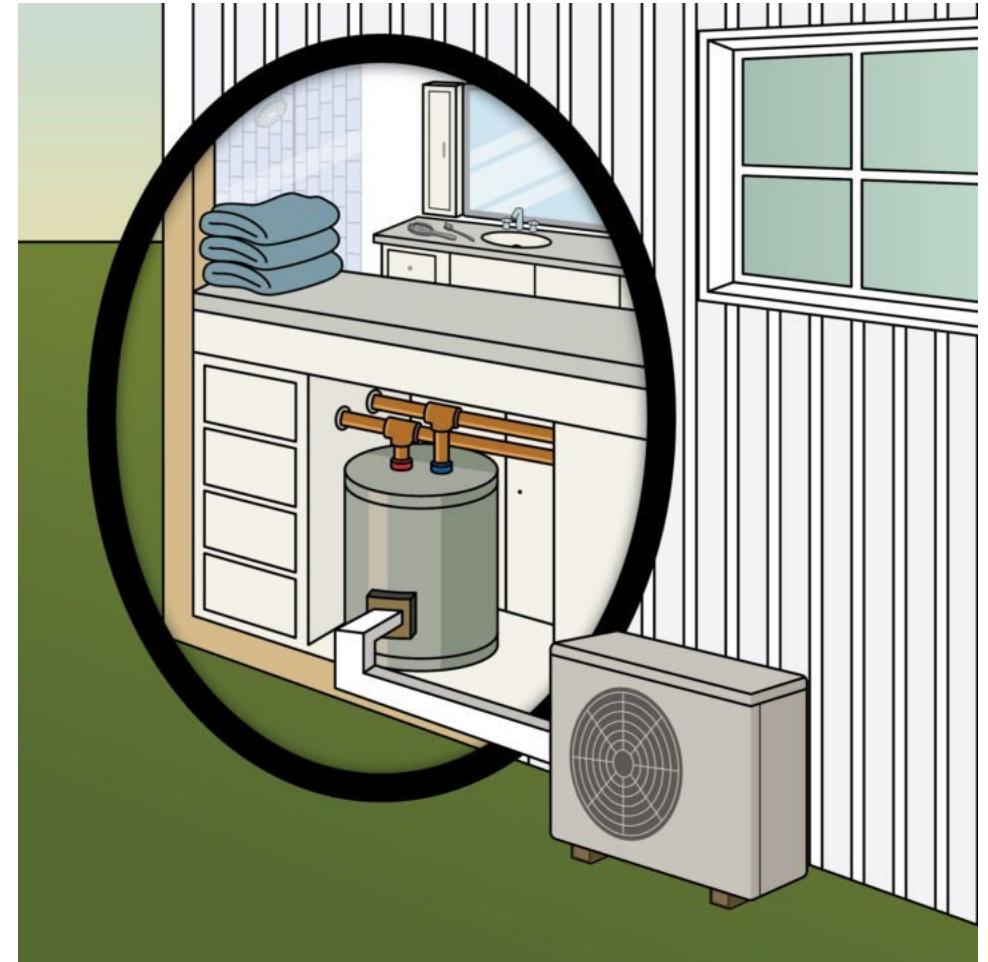


## *The Solution*



**A Split System Heat Pump Water Heater**

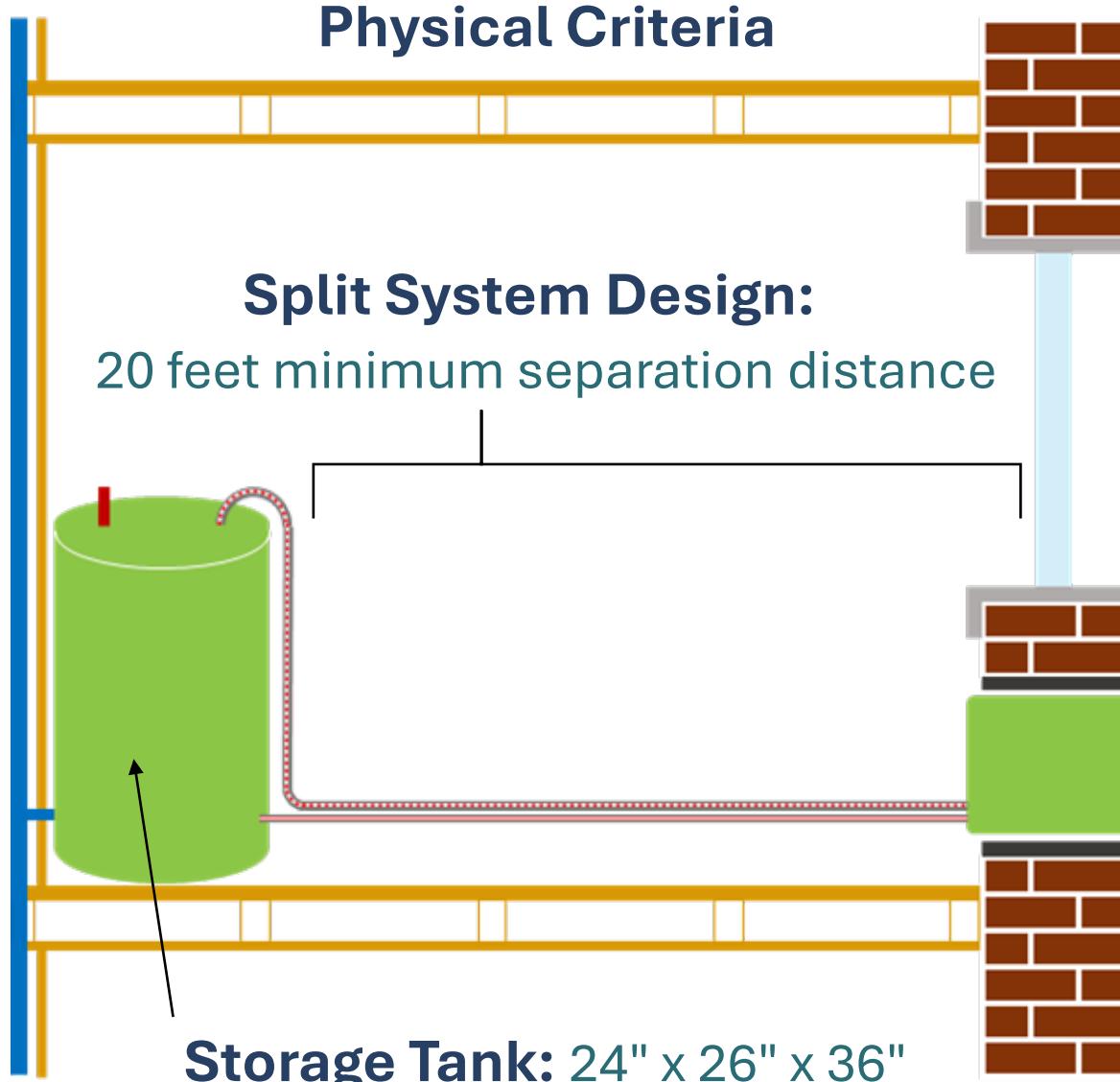
Widely Available & Affordable



# Contest Timeline, Funding, and Participation Limits

	Phase A: Participant Qualification	Phase B: Project Plan Submission	Phase C: Prototype Submission	Winners Announced
Timeline	60 Days: Q3–Q4 2024	70 days: Q4 2024–Q1 2025	10 months: Q4 2025–Q1 2026	Q3 2026–Q1 2027
NEEA Support	\$0	\$30k	\$175k	
Product limit	No Limit	Up to 5 products	Up to 2 products	

## Phase C: Minimum Criteria for Prototype Submission



### Performance Criteria

- **FHR:**  $\geq 38$  gallons
- **Efficiency:**  $UEF \geq 2.2$ ;  
 $SCOP \geq 2.4$
- **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	Phase B: Project Plan Submission	Phase C: Prototype Submission	Winners Announced
Timeline	60 Days: Q3–Q4 2024	70 days: Q4 2024–Q1 2025	10 months: Q4 2025–Q1 2026	Q3 2026–Q1 2027
NEEA Support	\$0	\$30k	\$175k	
Product limit	No Limit	Up to 5 products	Up to 2 products	

## *Innovation Prize Team*



Contest Administration



**Kannah  
Consulting**

ISO-17025 Certified Water Heating Lab

Media and Marketing



**Adam Gage**  
Sr. Product Manager, NEEA

**Emily Rosenbloom**  
Sr. Program Manager, NEEA

Technical Support

**Larson  
Energy  
Research**

# HOT WATER INNOVATION PRIZE



# THANK YOU

**Emily Rosenbloom, NEEA**  
[ERosenbloom@neea.org](mailto:ERosenbloom@neea.org)  
503.688.5440

# Agenda

*All Times Pacific*

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





# *2025 Level Up Consumer Marketing Campaign Results*

---

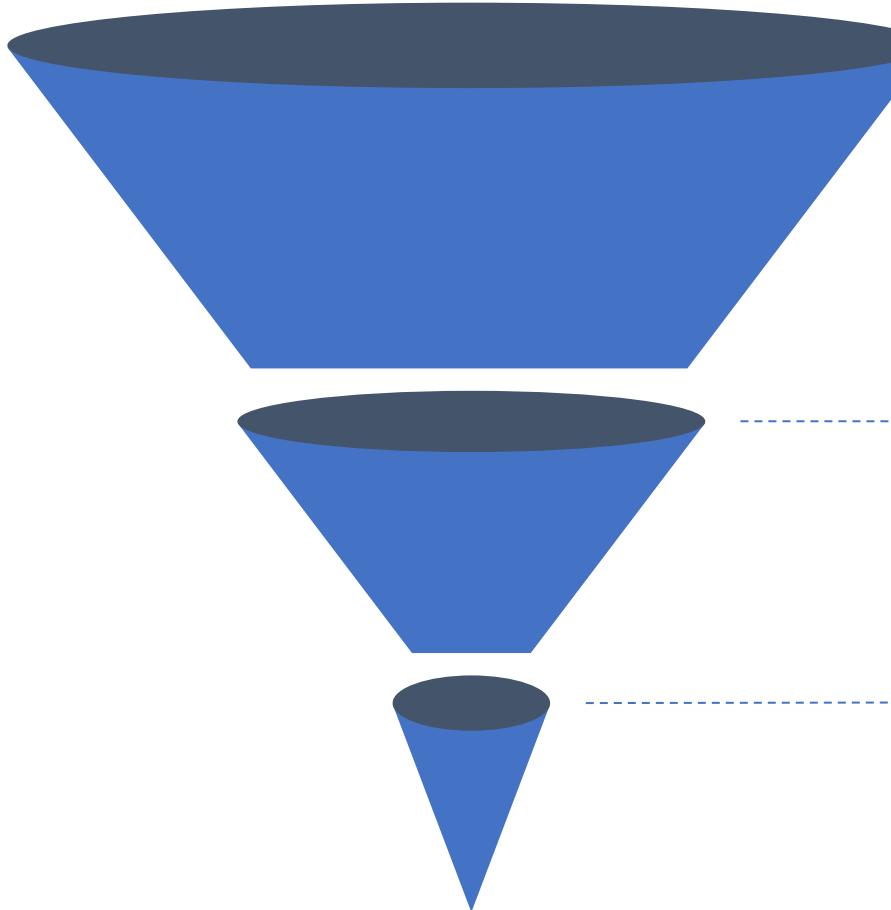
**Britt Cutsforth Dawkins**

Senior Manager, Marketing Strategy, NEEA

February 10, 2026



# Context: Marketing Funnel



**Awareness:** Consumers are aware that HPWHs exist, but don't know much beyond that. About half of consumers in the alliance's region have some level of awareness about HPWHs.

**Consideration:** Consumers in this stage have an improved awareness of HPWHs and they understand the value it offers them. A HPWH is a water heating solution they would consider.

**Conversion:** Consumers understand the value of a HPWH and want one. They proactively ask for a HPWH when they need to replace their existing electric water heater.

# 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

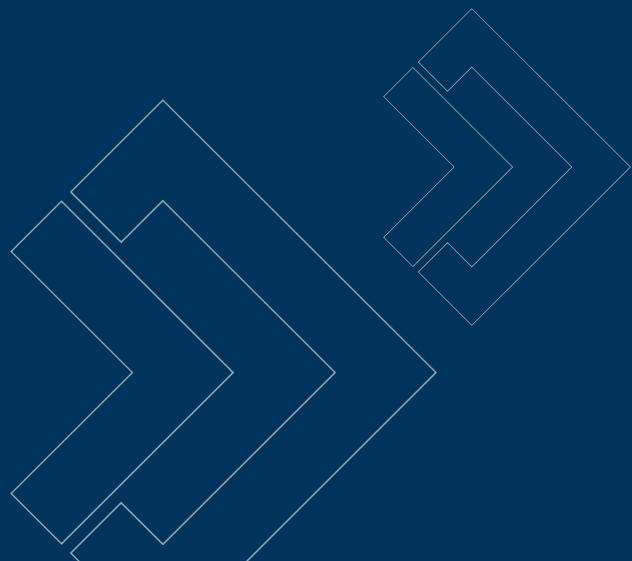




*The first thing to  
know:*

*The 2025 HPWH  
Level Up Campaign  
performed very well*

# 2025 *Level Up* *Campaign:* *Aggregate* *Campaign* *Metrics*



Metric	2024	2025
<b>Impressions</b>	24 million	26.5 million
<b>Clicks</b>	104,000	235,000
<b>CTR</b>	0.44%	0.89%
<b>Site sessions</b>	140,483	182,932
<b>Marketing conversions</b>	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. 0.20% 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](mailto:bdawkins@neea.org)

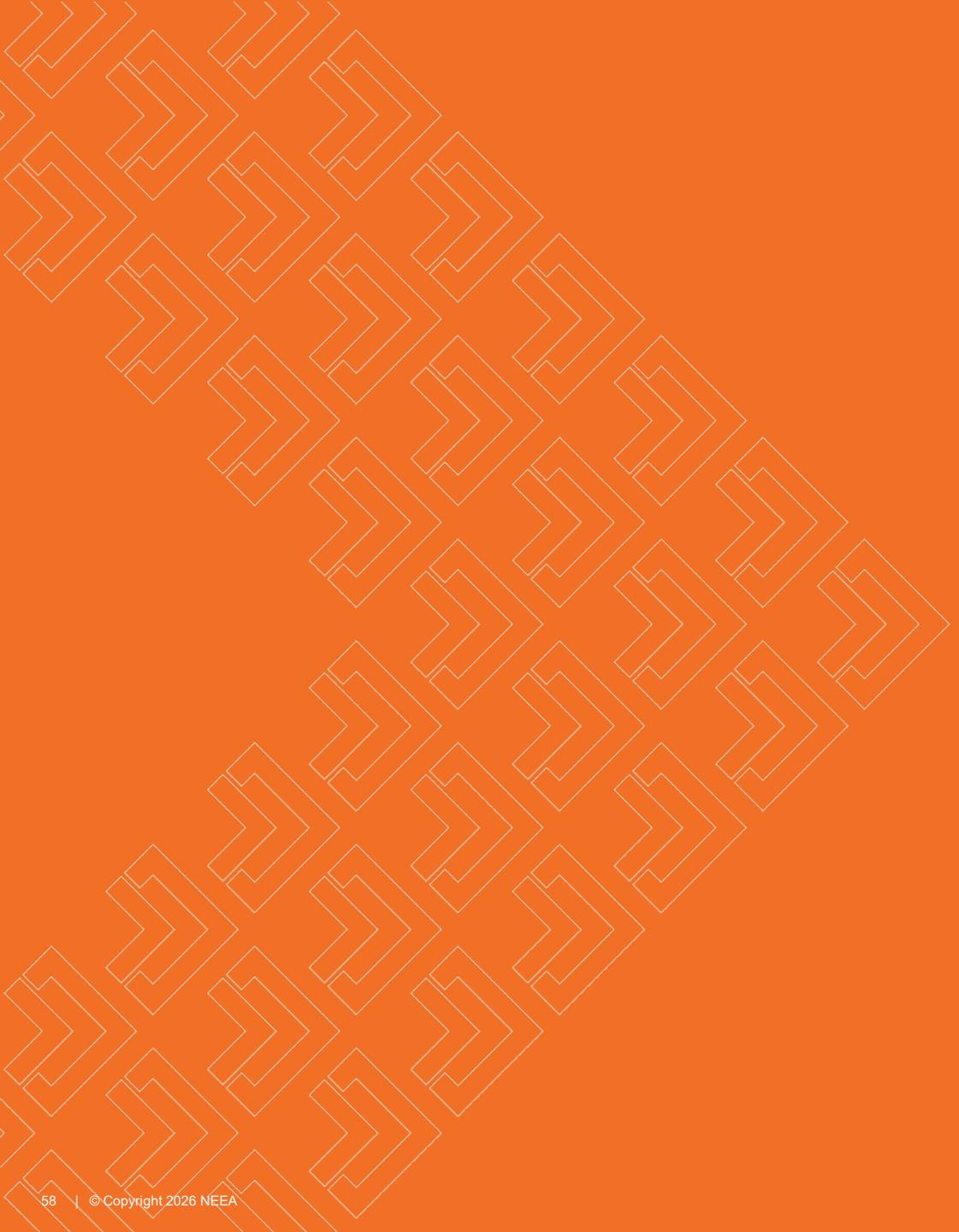


# Agenda

*All Times Pacific*

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

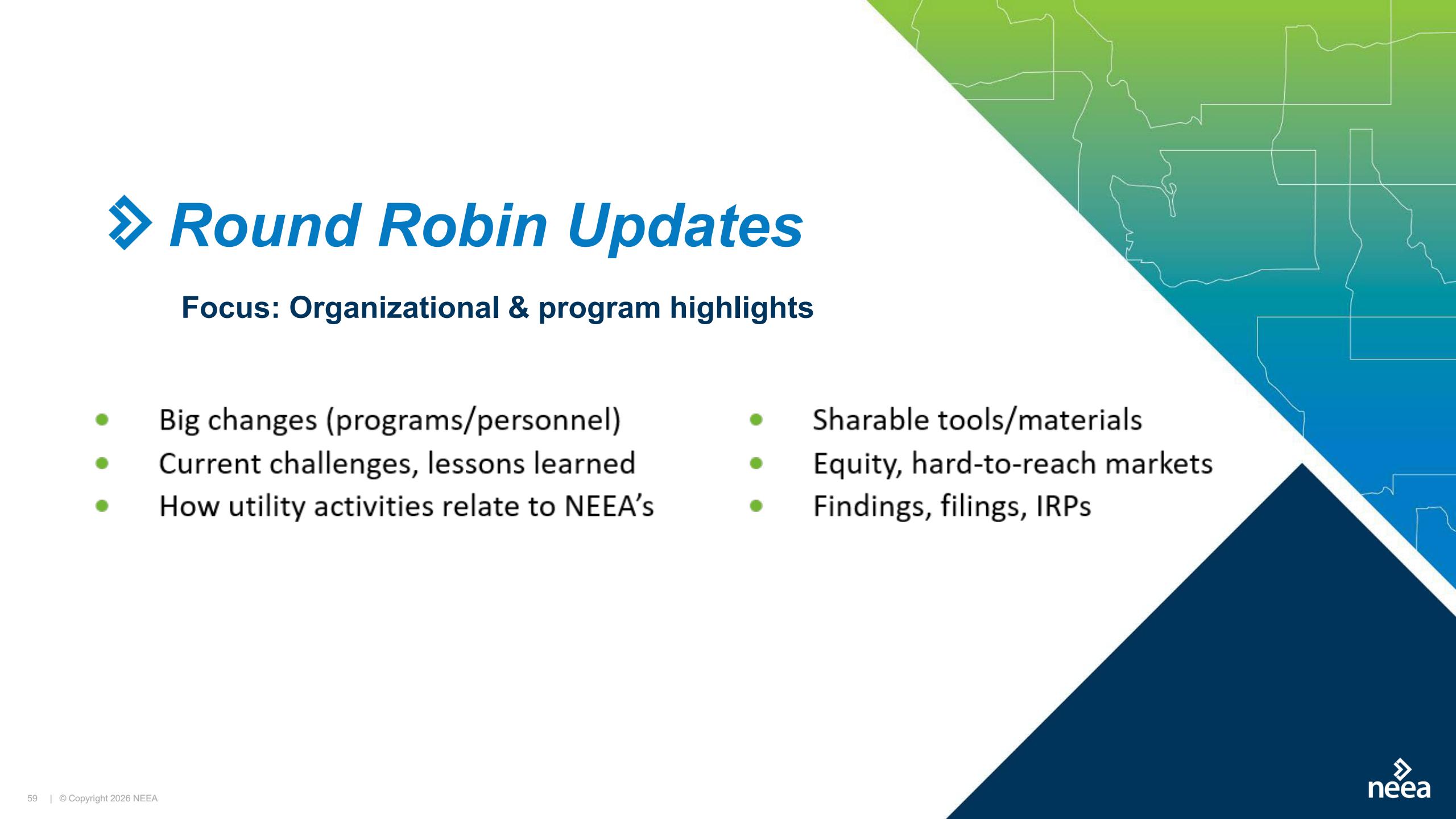




# Lunch

---

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



# 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)

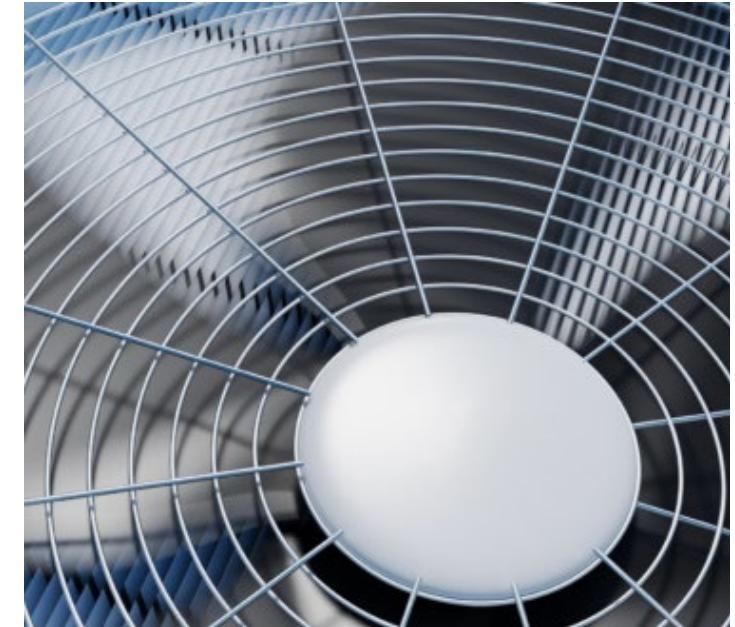




## ***Efficient Fans Product Definition***

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

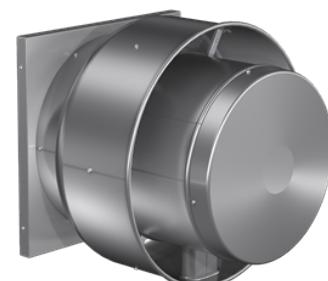
Definition -- A standalone  
FEI-certified fan not part of  
an efficiency-rated packaged  
piece of equipment.





## 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

Today  
Program Preview  
Collect initial questions

Mid-July  
Milestone documentation delivered to RPAC

(August 18<sup>th</sup> deadline)  
RPAC members respond with feedback, request for further discussion

September 1  
Milestone Votes at RPAC meeting

Outstanding Items

- Forecasting model
- Continued data analysis
- Finalized documentation



# Thank You!

**Alexis Muench**

Program Manager

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



**NW Natural**<sup>®</sup>



**PACIFIC POWER.**



**Portland General Electric**



**PUGET SOUND ENERGY**



**Seattle City Light**



# Agenda

*All Times Pacific*

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





## *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

