



Market Progress Quarterly Report



<div>  Products </div>					
Initiative Name		Manager	Fuel Type	Initiative Goal	
<div>  <div>Consumer Products Product Group</div> </div>	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.
	2024 Operations Plan Milestones		Target	Threshold	Status as of 5/6/2024
	Implement product-specific strategies		Document significant specification/standard progress related to four products	Document significant specification/standard progress related to two products	On target
	Develop and execute on opportunities to promote efficient TVs		Develop and launch a TV strategy by Q2	Develop and launch a TV strategy by Q3	On target
	Grow and strengthen ESRPP program through targeted recruitment and retention activities		Conduct outreach to three potential new program sponsors	Conduct outreach to two potential new program sponsors	On target
					Dominion Energy in Virginia joined the program in January 2024 following recruiting efforts in 2023. The program team will continue doing additional outreach during throughout the year.



Products

Initiative Name

Manager

Fuel Type

Initiative Goal



Extended Motor 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.

2024 Operations Plan
Milestones

Target

Threshold

Status as of
5/6/2024

Comment

Motivate participating manufacturers' representative firms to preferentially stock and increase sales of Smart Pumps and Smart Circulators

Reach market share of 20%+ for Smart Pumps and Circulators

Reach market share of 15%+ for Smart Pumps and Circulators

On target

Smart Pumps reached 17% market share in Q1, and Smart Circulators reached 26% market share. With new Smart Pump products launching and some expanding their range, we expect Smart Pump volume to pick up later this year.

Raise awareness of energy efficient pumps, the Energy Rating (ER) label, and the specific benefits of Smart Pumps related to installation and maintenance costs

Reach 500+ contact hours with Northwest pump buyers/specifiers to educate about Smart Pumps, the ER label and Hydraulic Institute's lifecycle cost calculator

Reach 400+ contact hours with Northwest pump buyers/specifiers to educate about Smart Pumps, the ER and Hydraulic Institute's lifecycle cost calculator

On target

Participating rep firms held ten educational events in Q1-24 reaching 112 participants, putting us on pace to reach or exceed our goal for contact hours. Numerous other events are planned throughout the year by participants and by the NEEA field team.

Leverage and expand relationships with pump manufacturers, distributors, and industry associations to accelerate Smart Pump and variable load pump market adoption

Ensure active participation by 10+ manufacturers' representative firms

Ensure active participation by 8+ manufacturers' representative firms

On target

All eight participating manufacturers' rep firms remained active in Q1, and we are working with two new prospective participants to explore the opportunity of them joining the program.

Motors Product Group



Products

Initiative Name

Manager

Fuel Type

Initiative Goal



Motors Product Group

Efficient Fans

Tamara Anderson

Electric

Develop program to accelerate the adoption of efficient fans and fan system components.

2024 Operations Plan
Milestones

Target

Threshold

Status as of
5/6/2024

Comment

Partner with two manufacturers or manufacturers' representatives to acquire and assess data, and to test interventions to promote the Fan Energy Index via their fan selection software

Confirm two additional manufacturer partners by Q2 2024

Confirm two additional manufacturer partners by Q4 2024

Heads up

The program is pivoting to include partnering with manufacturers' representatives as a primary strategic intervention in addition to partnering with manufacturers for the program based on research last fall and the results of the Market Characterization Study. The program team anticipates achieving the threshold for this goal.

Develop baseline and savings forecast along with a third-party review of the baseline and savings forecast

Complete baseline review by Q4 2024

Complete baseline review by Q1 2025

Action required

The program wants to get a complete data set from existing manufacturer partners and additional partners in 2024 in order to have the most comprehensive information possible before beginning baseline work. This will avoid risks associated with potential re-work and/or incomplete information leading to potential re-evaluation of key assumptions. The team anticipates the third-party review of the baseline and savings forecast to be complete by Q2 of 2025.

Conduct field or lab verification of fan systems in order to understand more about the performance of fan systems compared to the FEI design point and to inform program strategies and interventions.

Complete report by Q3 2024


Complete report by Q4 2024

Action required

This study is in the planning and scoping phase including conversations with manufacturer partners to identify which information would be the most beneficial to the product vision and program design. While the study is likely to be completed by Q4 2024, reporting may extend into Q1 of 2025.




Products

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.
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024
	Increase installer experience and confidence with installing HPWHs in retrofit and emergency installations	Reach 20% growth in HPWH installed as retrofit or emergency replacement tracked through distributor channel over prior year	Reach 10% growth in HPWH installed as retrofit or emergency replacement tracked through distributor channel over prior year	On target
	Prepare for the Department of Energy's (DOE) new consumer water heater standard final rule and continue efforts to reduce barriers to market acceptance of the new standard	Develop and distribute four regional or market resources by end of Q2 2024	Develop and distribute four regional or market resources by end of Q4 2024	On target
	Improve product suitability for challenging installations and customer acceptance	Gain commitment from two manufacturers to participate innovation project by Q3 2024	Gain commitment from two manufacturers to participate innovation project by Q4 2024	On target
		The program has collected Q1 sales data from the nine distributors who participate in our data collection effort, which represents approximately 77% of the regional heat pump water heater wholesale market. Early analysis of Q1 data indicates 30% increases in retrofit sales over Q1 2023 data.		
		The DOE released the Consumer Water Heating Final Rule on April 30. In anticipation, the program has worked during Q1 to draft fact sheets for distribution to actively engaged distributors and installers. These fact sheets aim to provide transparency regarding the specifics of the rule and the potential business opportunities. Additionally, NEEA is planning a regional webinar for June to explain the final rule's standards to funders and key regional stakeholders.		
		The program announced the Hot Water Innovation Prize during the shameless commerce event at the Hot Water Forum in March, garnering a positive response. To date, ten manufacturers have expressed interest in learning more about the contest and the steps to participate. A webinar will be hosted in May to provide manufacturers with participation details, and the program is on track to have multiple manufacturers committed to participating by the end of Q3.		




Products

Initiative Name		Manager	Fuel Type	Initiative Goal	
 Water Heating Product Group	Advanced Commercial Gas Water Heating		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.	
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024	Comment
	Validate product performance and energy savings	Successful demonstrations of two commercialized gas heat pump (GHP) products	Demonstration of one product	On target	The program is prioritizing three GHP products based on the previous product testing and market readiness/availability. The team is also compiling lab/field testing results done for all currently available products and identifying possible field and/or lab demonstration opportunities.
	Refine target market and value proposition, integrating findings into updated project strategy	Complete market research, initiate market characterization and pilot incentive program	Complete market research and initiate market characterization	On target	The program released a limited Request for Proposal for market research to confirm three target market building types for gas heat pump water heating: lodging, restaurants, residential multifamily. Contractor selection and kick-off will take place in Q2 and scoping Market Characterization in Q3. The team is working to identify possible partners to expand beyond the North American Gas Heat Pump Collaborative and is establishing a relationship with a Northwest distributor with a goal of developing a draft incentive program Q2.




Products

Initiative Name		Manager	Fuel Type	Initiative Goal	
 Water Heating Product Group	Efficient Gas Water Heating (EGWH) / Gas Heat Pump Water Heaters (GHPWH)		Gas	Develop program to accelerate product development of gas-fired heat pump water heater technology and create market conditions to accelerate market adoption to influence a federal manufacturing standard.	
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024	Comment
	Develop regional market acceleration strategy to demonstrate the Northwest's commitment to GHPWH technology	Finalize regional market acceleration strategy by Q4	Draft regional market acceleration strategy by Q4	On target	The program developed a draft timeline and structure for strategy development, identifying data needs and support resources. Next steps include contracting for support resources, analyzing existing data and interviewing key resources
	Use existing relationships with major manufacturers to understand and support an expedited review of the business case and initiation of commercialization	Partner with two major manufacturers to initiate commercialization stage gate process	Identify one major manufacturer to initiate commercialization stage gate process	On target	The program is holding numerous meetings with manufacturers and technology developers. The program is initiating market research to support manufacturer conversations, expecting work to begin in early Q2 resulting in a final report by late Q3 2024.
	Scan the market for additional technology options	Identify two additional technology options	Identify one additional technology option	On target	After additional delays due to issues with ancillary components, adsorption GHPWH testing results (expected early Q2) will inform next steps for manufacturer collaboration and market acceleration strategy. Absorption GHPW developer maintaining market awareness, but currently focused on monobloc (furnace/combi replacement) gas absorption heat pump.




Integrated Systems

Initiative Name		Manager	Fuel Type	Initiative Goal	
HVAC Product Group	 High-Performance HVAC / Very High Efficiency Dedicated Outside Air Systems (VHE DOAS)		Maria Murphy	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.
	2024 Operations Plan Milestones		Target	Threshold	Status as of 5/6/2024
	Educate and motivate early adopter manufacturers' representatives/distributors to promote the system approach and support tracking of market progress		Generate at least seven joint promotional efforts for NEEA's target supply chain audiences	Generate at least five joint promotional efforts for NEEA's target supply chain audiences	On target
	Raise supply chain and end-user awareness of the system approach and its significant cost savings and non-energy benefits		Collaborate on 15 events with alliance partners, key industry and/or professional/trade organizations	Collaborate on 10 events with alliance partners, key industry and/or professional/trade organizations	On target
	Increase availability of qualifying Energy/Heat Recovery Ventilators (E/HRVs)		Ensure E/HRV offerings are available for at least two new capacities or price points, or that two new manufacturers have eligible equipment	Ensure E/HRV offerings are available for at least one new capacity or price point, or that one new manufacturer has eligible equipment	On target
	Provide market data and evidence to influence the advancement of future local, state and federal codes development		Submit one revised code change proposal for ASHRAE 90.1-2025 and/or 2027 IECC development process	Complete one research activity for ASHRAE 90.1-2025 and/or 2027 IECC development process	On target

HVAC Product Group




Integrated Systems

Initiative Name		Manager	Fuel Type	Initiative Goal		
<div> HVAC Product Group</div>	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.	
	2024 Operations Plan Milestones		Target	Threshold	Status as of 5/6/2024	Comment
	Increase national partner alignment on advanced heat pumps strategy		Increase national partner alignment on advanced heat pumps strategy	Convene program and policy thought leader participants representing three major regions, including the Northwest and others	On target	The program met with national partners and manufacturers at the Air Conditioning, Heating and Refrigeration Expo in January to build alignment on Advanced Heat Pump strategies. Convened national partners and manufacturers in March during the Hot Air Forum in Atlanta to build alignment on connected commissioning. Presented on Advanced Heat Pumps at the Hot Air Forum. Presented to NEEA Product Council in March to present updates on low-efficient improvement to over 60 attendees from NW utilities, national stakeholders, and manufacturers' representatives.
	Advance validation of prioritized improvements		Validate energy savings for low load efficiency and cold climate capability	Validate energy savings for low load efficiency and clear validation timeline established for cold climate capability	On target	Completed Phase I of low load efficient research. Launched planning and contracting for lab and field validation activities for low load efficiency and cold climate capability.
	Provide data and technical expertise to influence updates to the federal test procedure and other national standards and practices		Collaborate with DOE, CEE and EPA to include priority improvement(s) in updates to test procedures, efficiency tiers, and/or ENERGY STAR requirements	Provide input to DOE, CEE and EPA processes for updating test procedures, efficiency tiers, and ENERGY STAR requirements	On target	Participated in closed negotiation with manufacturers, and U.S. Department of Energy (DOE) convened by Air Conditioning, Heating, and Refrigeration Institute. No agreement was reached at this time. DOE has issued Notice of Proposed Rulemaking for test procedure - final comments due in May. Attended Consortium for Energy Efficiency (CEE) HVAC subcommittee meetings to advocate for adoption of Advanced Heat Pump strategies in heat pump tier criteria.




Integrated Systems

Initiative Name	Manager	Fuel Type	Initiative Goal
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 HVAC	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.	
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024	Comment
	Build manufacturer support for improvements	Gather support for priority improvements from three manufacturers	Engage three manufacturers on improvement validation and support	On target	NEEA facilitated direct briefings with several manufacturers on improvement advancements. Coordinated tax credit threshold specification discussions between manufacturers and CEE Residential HVAC committee members.



Integrated Systems

Initiative Name		Manager	Fuel Type	Initiative Goal
HVAC Product Group	 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.
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024
	Encourage manufacturers to develop and promote efficient RTUs for the light commercial market	Engage minimum of four manufacturers with to provide either new eligible equipment two new price points or two expanded products under 12 tons	Engage minimum of two manufacturers to provide either new eligible equipment, one new price points or one expanded product under 12 tons	On target
	One manufacturer has designed and is bringing an energy recovery ventilator (ERV) product to market to be used in place of the economizer of their light commercial RTUs. This product will be available for wholesale purchase in 2024.	The program is working with extra-regional partners to develop manufacturer engagement plans to align on future RTU design improvements.		
	Create awareness of and support for efficient RTUs from market actors (manufacturers, manufacturers' reps, distributors, contractors) and utilities across the U.S. and Canada	Recruit six manufacturers/distributors/manufacturers' reps by Q2 2024 to partner and submit data showing efficient RTU sales	Recruit four manufacturers/distributors/manufacturers' reps by Q4 2024 to partner and submit data showing efficient RTU sales	On target
	Regular meetings with distributors and manufacturers' reps are ongoing. One manufacturers' rep has begun submitting initial sales/pipeline data. Program is recruiting an outreach vendor to engage with supply chain to increase awareness of efficient RTUs and develop data sharing agreements.			
	Work with alliance stakeholders to increase utility programs that reference NEEA's Efficient RTU Specification	Get commitment from four Northwest utilities by Q2 2024 to offer efficient RTU measures	Get commitment from two Northwest utilities by Q4 2024 to offer efficient RTU measures	On target
	The program had meetings with Northwest natural gas and dual-fuel utilities in Q1 to discuss measures related to Efficient RTUs. Program has ongoing discussions with the RTF to develop RTU measures for the region.			



Integrated Systems

Initiative Name

Manager

Fuel Type

Initiative Goal



Lighting Product Group

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.		
2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024	Comment	
Increase decisionmaker 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	Two success stories were under development in Q1 and will be rolled out in Q2.	
Strengthen focus and promotion of LLLC by key manufacturer sales channels	Increase local manufacturers' representatives that have featured LLLC in strategic meetings or events targeting specifiers by 25% (31 manufacturers' representatives)	Increase local manufacturers' representatives who have featured LLLC in strategic meetings or events targeting specifiers by 10%	On target	The program collaborated with 19 local manufacturers' representatives to deliver 6 different events in Q1. These events reached a wide range of lighting engineers, designers and installer throughout the region.	
Influence leading specifiers to include LLLC in their ongoing business practices	Increase specifiers collaborating with program on media content, events or educational activities by 30% (8 specifiers)	Increase specifiers collaborating with program on media content, events or educational activities by 15%	On target	The program collaborated with a leading designer to deliver a presentation on LLLC at the Lighting Slam in Seattle hosted by Illuminating Engineering Society (IES), International Association of Lighting Designers (IALD) and Women in Lighting Design. The program also partnered with a local electrician on a LLLC training for 4th year electrical apprentices at the International Brotherhood of Electrical Workers (IBEW) facility located in Kennewick.	
Increase visibility and demand for LLLC through strategic national engagements	Strengthen strategic alignment with four national or extra-regional partner organizations	Strengthen strategic alignment with two national or extra-regional partner organizations	On target	The program continued its collaboration with Center for Energy and Environment in Minnesota with a focus on data gathering, analysis and insights.	



Integrated Systems

Initiative Name

Manager

Fuel Type

Initiative Goal



Building Envelope Product Group

High Performance Windows (HPW)

Tamara Anderson

**Dual Fuel:
Electric/Gas**

Develop program to accelerate the adoption of high performance windows that reach 0.20 U-Factor or lower by increasing builder demand, influencing leading manufacturers to scale production and advancing the ENERGY STAR® criteria.

**2024 Operations Plan
Milestones**

Target

Threshold

**Status as of
5/6/2024**

Comment

Evaluate the alliance's influence to-date via program efforts and participation via the Partnership for Advanced Windows Solutions (PAWS) on the ENERGY STAR Residential Windows, Doors, and Skylights Version 7.0 Specification

Complete Market Influence Study by Q2 2024

Complete Market Influence Study by Q3 2024

Heads up

NEEA's ENERGY STAR Version 7 Influence Study Limited RFP will be going out soon. The team anticipates this evaluation to be completed on by the end of Q3.

Engage major manufacturers and/or window suppliers to acquire sales data and learn about their go-to market strategies for high-performance windows

Confirm three partners to supply sales data by Q2 2024

Confirm two partners to supply sales data by Q4 2024

Heads up

Manufacturer outreach will be a focus for Q2 yet contracting agreements are not likely to be completed by the target date. The program has been partnering with MN CEE to collaborate on national manufacturer engagement to consolidate the asks for data and to maximize the potential of success for both organizations. The program is still working to reach the threshold by the end of the year.

Continue the Volume Builder Project and complete an in-progress project with national production builder.

Document lessons learned by Q4 2024

Document lessons learned by Q1 2025

On target

68 of 100 homes have been completed by the end of Q1. The window purchases are forecasted be completed in early Q4. The program team will conduct an exit interview with the builder to document lessons learned in Q4.



Initiative Name		Manager	Fuel Type	Initiative Goal	
Infrastructure Programs	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.	
	2024 Operations Plan Milestones	Target	Threshold	Status as of 5/6/2024	Comment
	Leverage BetterBricks relationships to secure and execute engagement opportunities for current and future programs	Secure and execute 12 market engagements with key market partners	Secure and execute nine market engagements with key market partners	On target	BetterBricks executed four engagements with key partners in Q1 2024. These included hosting a High-Performance HVAC lunch-and-learn with McKinstry, co-presenting on smart buildings at an APEM Winter Webinar, and supporting an LLC presentation and booth at the IFMA Oregon & SW Washington Symposium. BetterBricks also co-sponsored a BOMA Oregon luncheon on Energy Reporting along with Energy Trust and gave an overview of the BetterBricks platform and resources.
	Maximize the impact, relevance, and awareness of BetterBricks content to ensure positioning as a trusted, go-to source of information and increase engagement amongst target audiences.	Develop and distribute 20 pieces of original content supporting whole building efficiency or integrated design	Develop and distribute 15 pieces of original content supporting whole building efficiency or integrated design	On target	BetterBricks published five new resources in collaboration with NEEA program teams, including: 1) three blog posts covering efficient fans, pumps, and efficient gas rooftops, 2) one new video case study featuring a very high efficiency DOAS installation at a school in Monument, OR, and 3) one new article covering the benefits of decoupling your heating and cooling systems from ventilation. BetterBricks also hosted a virtual webinar on connected lighting and cybersecurity. This is the first in a new quarterly series covering a range of relevant industry topics including planning and sequencing for whole-building upgrades, regional building energy codes, and financing.



Infrastructure

Initiative Name		Manager	Fuel Type	Initiative Goal		
Infrastructure Programs	Commercial and Industrial Strategic Energy Management (SEM)		Suzi Asmus	Electric	Sustained adoption of SEM is valued, desired, and implemented by a majority of Northwest business owners.	
	2024 Operations Plan Milestones		Target	Threshold	Status as of 5/6/2024	Comment
	Fully transition the Northwest Strategic Energy Management Collaborative administrative management from Northwest Energy Efficiency Alliance to the North American Strategic Energy Management Collaborative and the American Council for an Energy-Efficient Economy		Transition during Q3 2024	Transition by end of 2024	On target	On target for Q4.
	Retire or transition to new owners all NEEA Strategic Energy Management assets (Energy Management Assessment tool, SEMHub.com, Energy Talk Cards, Online training courses) for end of NEEA funding support.		Transition by December 1, 2024	Transition by December 31, 2024	On target	On target for Q4.
	Communicate transition of Collaborative and assets clearly and effectively to ensure smooth transition for all stakeholders.		Communications by Q4 2024	Communications by Q4 2024	On target	Communications ongoing. On target.