

Regional Portfolio Advisory Committee



DATE: Tuesday, February 11, 2025

TIME: 9:00am – 12:00pm Pacific

LOCATION: Virtual via Microsoft Teams

VIRTUAL: [Click here to join the meeting](#) (Meeting ID: 219 238 866 101 | Passcode: No3Pw6hk)
(if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 796 315 180#

AGENDA (All Times Pacific)

Page #

| | | | |
|-------------------------|---|--|------------|
| 9:00-9:20 (20 min) | Welcome, Introductions & Agenda / Packet Review | All | 1-2 |
| 9:20-9:30 (10 min) | Housekeeping and Looking Ahead <ul style="list-style-type: none"> General Updates <ul style="list-style-type: none"> NEEA Reporting Feedback Survey (complete by Feb 21) Announcements & Reminders <ul style="list-style-type: none"> EFX Registration Opens Feb 18 Upcoming Meetings <p><i>Desired Outcome: Committee aware of recent developments and upcoming topics for engagement.</i></p> | Alisyn Maggiora | 3 |
| 9:30-9:55 (25 min) | Portfolio Update <ul style="list-style-type: none"> Look Back – 2024 Market Progress Highlights Look Ahead – 2025 Focus Areas <p><i>Desired Outcome: Committee aware of key areas of progress and reminded of focus areas from the 2025 Operations Plan.</i></p> | Emily Moore | 4 |
| 10 min | BREAK | | |
| 10:05-10:55 (50 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 Equity, hard-to-reach markets Findings, filings, IRPs | All | -- |
| 10:55-11:15 (20 min) | Market Transformation Highlight: ENERGY STAR TVs <ul style="list-style-type: none"> Describe recent and ongoing Market Transformation activities focused on TV energy efficiency. <p><i>Desired Outcome: Committee provided with recent example of NEEA extra-regional impact serving the goals of the northwest region.</i></p> | Steve Seminario | 5 |
| 10 min | BREAK | | |
| 11:25-11:55 (30 min) | Heat Pump Water Heater (HPWH) Marketing Campaign Results <ul style="list-style-type: none"> Highlights from 2024 Consumer Consideration “Level-Up” Campaign <p><i>Desired Outcome: Committee understands results of marketing campaign and how it will inform future program strategies.</i></p> | Emily Rosenbloom Britt Cutsforth Dawkins | 6-7 |
| 11:55-12:00 (5 min) | Wrap-Up & Adjourn | Alisyn Maggiora | -- |

Informational Updates:

- **Page 8:** Regional Online Marketplace Update
- **Page 9-11:** Q4/Q1 Committee Updates

Additional Reference Materials:

- **Programmatic Updates:**
 - Q4 2024 [Market Progress Report](#) (Gas + Electric Programs – Progress toward annual goals)
- **Committee Meeting Materials & Charters:**

Please review the committee updates summary on pg. 8 for a quick recap on recent and upcoming committee activities/topics. Links to recent meeting materials are provided there.

 - Q4 2024 RPAC meeting [packet](#), [slides](#) and [notes](#)
 - Charters: [RPAC](#), [ISCC](#), [PCC](#), [CEAC](#), [RETAC](#)
- **Latest Functional Newsletters:**
 - Q4 2024 Newsletter – [Market Research and Evaluation](#)
 - Q4 2024 Newsletter – [Emerging Technology](#)
 - Q3 2024 Newsletter – [Codes, Standards and New Construction](#)

2025 RPAC MEETING DATES:

| Quarter | Day(s) | Date(s) | TIME (pst) | LOCATION |
|---------|--------|---------|------------|---|
| Q1 | Tues | Feb 11 | 9-4 | Virtual |
| Q2 | Thurs | May 22 | 9-4 | NEEA / Hybrid (<i>note – day after EFX</i>) |
| Q3 | Wed | Aug 20 | 9-4 | Virtual |
| Q4 | Mon | Nov 3 | 9-4 | Virtual |

Memorandum – *Agenda Item*

February 4, 2025



TO: Regional Portfolio Advisory Committee

FROM: Alisyn Maggiora, Sr. Stakeholder Relations Manager

SUBJECT: NEEA Reporting Audit & Potential Streamlining

Our Ask of You:

- 1) Please review the memo and bring any questions, recommendations, feedback, or concerns to the Q1 RPAC meeting on February 4, or contact me at the email below.
- 2) **Please complete the [survey](#) by Friday Feb 21.**

Context

NEEA staff are conducting an audit of the reports, newsletters and other materials communicated to alliance members to better understand what's useful and valuable. This effort seeks to achieve balance with the time spent compiling these materials and what's desired/useful, and/or duplicative. Feedback will help determine whether there's a need to streamline the number of reports/materials produced and possibly the communication channels used. Thank you in advance for taking a few minutes to provide us with feedback on what's most useful to you.

SURVEY LINK: <https://www.surveymonkey.com/r/2025-Reports-Value-Assessment>

REFERENCE ONLY: Current NEEA Reports with Linked Examples

NOTE: Please do not feel the need to review each of these reports. The survey is designed to capture the types of information that are valuable to you more generally. The list below / linked examples are provided so you have the formal names/purpose/content handy in case it's helpful. If you have a strong preference for any of these reports as they are structured today, please include that feedback in the survey.

1. [Annual Operations Plan \(2025\)](#)
2. [Annual Report, Key Assumptions and Business Cycle Savings Update](#) (electric + gas, reported to Cost-Effectiveness & Evaluation Advisory Committee in Q2 each year)
3. [Annual Cycle Scorecard](#) (as part of Q1 2024 Quarterly Report)
4. [Annual Report \(2023 is latest available\)](#)
5. Coordinating Committees - Semi-annual Program Activity reports:
 - [Q4 2024 Residential Program Activity Reports](#)
 - [Q4 2024 Commercial & Industrial Program Activity Reports](#)
6. [End of Business Cycle Report \(2015-19\)](#)
7. [Quarterly ED Update, Report & Scorecard](#)
8. [Quarterly Natural Gas Portfolio Progress Report](#)
9. [Quarterly Market Progress Report](#) (Program progress to annual goals: electric + gas)
10. [Codes & Standards Newsletter](#)
11. [Emerging Technology Newsletter](#)
12. [Market Research and Evaluation Newsletter](#)

Please contact [Alisyn Maggiora \(amaggiora@neea.org\)](mailto:amaggiora@neea.org) if you have questions about this effort.

Memorandum – *Agenda Item*



February 4, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Moore, Director, Market Strategy & Execution

SUBJECT: Portfolio Quick Look Back, Look Ahead

Our Ask of You:

Please bring any questions related to the electric portfolio 2025 goals and focus areas to the RPAC meeting on 02/11/2025.

Brief Summary of Discussion Topics

To kick off the new year, and first year of the Cycle 7 Business Plan, NEEA staff will summarize key highlights from market and program progress in 2024 and review the key goals and focus areas for 2025.

As a review, the focus areas for the natural gas portfolio from the 2025 Operations Plan include:

- Increase regional adoption of Heat Pump Water Heaters and focus on barriers to market acceptance of the future federal standard.
- Expedite programs to accelerate market change.
- Prioritize opportunities that contribute to peak load reduction and decarbonization.
- Advance strategic account management practices to increase scale and build extra-regional alignment.

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

Memorandum – *Agenda item*

February 4, 2025



TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Steve Seminario, Market Transformation Manager, Consumer Products

SUBJECT: **Market Transformation Highlight: ENERGY STAR® TVs**

Our Ask of You:

This is an inform topic. Please review the context provided below and feel free to ask any questions you may have during the RPAC meeting or contact me at the email below.

Brief:

In the Q1 RPAC meeting, NEEA staff will share a brief Market Transformation highlight regarding the ongoing and recent work focused on TV energy efficiency. The Retail Products Portfolio (RPP) program continues to work with the ENERGY STAR® Retail Products Platform (ESRPP) and retail partners on strategies to promote ENERGY STAR® v9.1 TV products.

Context:

NEEA has influenced the market transformation of energy efficient TVs continuously over the past sixteen years. As TV technology, usage patterns and market dynamics have changed over that period, a series of new barriers and opportunities have arisen that have guided NEEA's market transformation efforts.

Our early efforts with TV test methodology, ENERGY STAR® specifications and mid-stream incentive program development contributed to an overall 67% reduction in TV energy use measured in watts per square inch of screen size. But in the highly competitive, feature-driven TV marketplace, test methodologies and meaningful specifications ceased to capture the true energy impacts of new TVs being deployed in US homes at a rate of 41 million new units per year and in the Northwest at 1.3 million per year.

NEEA's focus on a fair and comprehensive TV test method over the past seven years has resulted in a standard called ANSI/2037-D that has been adopted broadly in the U.S. as it has made considerable headway internationally as well. The accurate and level playing field created by this test methodology has allowed new, meaningful energy-use specifications to be created by ENERGY STAR® and others. ENERGY STAR® v9.1 savings potential, if fully realized, would equal 3.4 TWh for the nation and 108,000 MWh in the Northwest.

NEEA's efforts continue as we work with our partners to raise consumer and market awareness of the large variance in individual TV efficiency and the significant collective energy impact possible by acting together. NEEA hopes to leverage the success of new efforts related to retailer incentives and consumer awareness building as energy efficiency is substantiated among consumer TV buying criteria, which will have an associated impact on manufacturer sales volumes.

Please contact Steve Seminario sseminario@neea.org if you have questions about ENERGY STAR® TVs as they relate to the Retail Products Portfolio.

Memorandum – Agenda Item



February 4, 2025

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Britt Cutsforth Dawkins—Manager, Program Marketing Strategy
SUBJECT: Results of 2024 Heat Pump Water Heater (HPWH) Awareness and Consumer Campaign

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Brief

The Level Up campaign was developed and vetted closely with the RPAC+¹ group in 2024 with the goal of raising consumer awareness and consideration of HPWHs across the region. From February through May, NEEA's Stakeholder Relations and Marketing teams met with RPAC members and their marketing/ communications staff to secure approval on the new campaign, which leveraged messaging from the previous *Boring But Efficient* campaign. The plan was approved in the Q2 2024 RPAC/RPAC+ meeting.

The *Level Up* campaign ran mid-August to end of October 2024. The campaign exceeded expectations and drove more than 24 million impressions and nearly 105,000 clicks, and a 0.44% total clickthrough rate (CTR) with the targeted audience; see Metrics section below for detail.

Strategy

To ensure the Program continues to move consumers along their journey and ultimately drive long-term downstream demand for HPWHs, we had two guiding strategies for the 2024 campaign:

- 1) **Continue increasing awareness of HPWHs across our region.** Despite at least 57% of Northwest consumers reporting awareness of HPWHs, there are still many consumers unaware of these energy-efficient products. This is in alignment with the Market Research & Evaluation's [HPWH Market Progress Evaluation Report #6](#) recommendation to increase HPWH awareness specifically in areas with historically low levels of awareness and adoption.
- 2) **Educate consumers who have an existing level of awareness of the value proposition of HPWH**, therefore moving them in their journey from HPWH awareness to consideration. The campaign was designed to drive continued engagement with the already-aware consumers and build their understanding of HPWHs, not to directly drive immediate action or sales.

Consumer Journey & Metrics

As with previous campaigns, the advertising appeared on ad display networks and Facebook and Instagram (Meta). Each ad directed click traffic to the campaign landing page: HotWaterSolutionsNW.org/level-up. The landing page educated consumers about HPWHs through a game-based experience, highlighting three messaging points about the product and directing them to find an installer, see their local utility's incentives (if available), or locate a nearby retailer.

The *Level Up* campaign achieved the following metrics:

- 24.05 million impressions (individual consumers the campaign reached multiplied by ad frequency)
- 104,903 clicks to the Level Up campaign landing page (total number of clicks on the campaign ads)
- 0.44% total campaign CTR (ratio of ad clicks against ads served on both Facebook/Instagram and display ads)
- 140,483 sessions (a specific visit to/interaction with a website; can contain multiple page views)
- 1,379 conversions (clicks on the Level Up landing page to find an installer, see utility rebates, installer, or find a retailer)
- Approximately 60 consumer comments (number of comments in response to the Facebook and Instagram ads)

¹ As a reminder, NEEA's marketing activities directed at end-use customers will be brought through the RPAC+ process for review. The intent of the RPAC+ process is to ensure transparency, allow adequate time for deliberation and coordination in the planning process, and to assess the effectiveness of the alliance's evolving regional downstream marketing work. The (+) implies the addition of relevant marketing and/or communications staff from funding utilities.

The total number of clicks and the CTR were our key performance indicators, and the *Level Up* campaign performed above expectations for both of these measures. The CTR was particularly important as it serves as an indicator of interest in the content, measuring the percentage of our targeted audience who engage with the ads and become aware and/or more considerate of HPWHs. As anticipated, engagement was higher on Facebook and Instagram (1.34% CTR) than on display ads (0.09% CTR). The campaign also exceeded the secondary goal of driving 120,000 web sessions by 17%, achieving 140,483 sessions.

This campaign has three main takeaways that will inform our overall marketing strategy and messaging, as well as the to-be-proposed 2025 consumer marketing campaign:

TAKEAWAY: We continue to see strong results from across the region—and areas with historically low adoption continue to respond well.

Response to the *Level Up* campaign was again stronger than expected, indicating a continued increase in HPWH interest across the region:

- Facebook/Instagram: Across all states, urban audiences showed a slightly higher average CTR (1.42%) compared to rural ad sets (1.24%), suggesting pre-existing and stronger awareness of HPWH in urban areas.
- Display ads: Urban areas drove the highest number of conversions, demonstrating the effectiveness of targeting densely populated regions for engagement and action. The majority of conversions attributed to the display ads were on the “Rebate” button, demonstrating broad consumer interest in financial savings.

TAKEAWAY: We can optimize the messaging and landing page to drive deeper awareness and consideration.

Retargeting tactics in rural areas often outperformed standard targeting in CTR, suggesting continued investment and creative tailored to “come back” messaging could help re-engage rural audiences and increase consideration over time.

The majority of consumers who clicked through to the landing page then clicked on the “LET’S GO: Level Up My Water Heater” button as designed, but page engagement could benefit from testing different elements—such as messaging, buttons, images, and forms—to see what makes it easier for users to take further action and increase total conversions.

In terms of campaign conversions, the largest number of clicks were on the “Find Installers” button, followed by “Find Rebates,” indicating that consumers who landed on the *Level Up* page saw that as their first step after learning about the product.

We found that retargeting homeowners who had already visited the site with display ads proved to be the most effective strategy and led to the highest number of conversions—we may develop a more focused and separate landing page for future retargeting ads.

TAKEAWAY: We need to expand our marketing tactics in order to reach all audiences.

While our ads on Facebook/Instagram perform well, the age distribution of those who engaged with the ads suggest the older demographic may be more interested in learning about HPWHs and able to make improvements to their homes. To engage consumers under 55, we should consider utilizing placements popular with younger audiences, including Stories and Reels, and allocating a dedicated budget toward Instagram to ensure the message is seen by younger users. We will also explore additional marketing placements to drive awareness and consideration, such as streaming digital video services and audio (e.g., Spotify, podcasts).

Please contact Britt Cutsforth Dawkins (BDawkins@neea.org) if you have questions about this campaign.

Memorandum – Informational (Tier 2)

February 4, 2025



TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Steve Seminario, Market Transformation Manager, Consumer Products

SUBJECT: Regional Online Marketplace Update

Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the Q1 RPAC meeting on February 11, 2025, or contact me at the email below.

Brief Summary of Program Update

As shared in the [Q4 RPAC meeting](#), NEEA is running a technology scanning project to build and evaluate a regional online marketplace intended to help Northwest residents to easily find and purchase more energy efficient products. The project seeks to characterize how a regional online marketplace can drive adoption of higher efficient products across multiple categories. Additional objectives include collecting data on consumer purchasing habits, which will help inform consumer product market transformation strategies and alliance programs. The marketplace (nw.enervee.com) went live November 26, 2024, and to-date over 12,000 Northwest residents have used the site to search over 30 categories of efficient products and appliances.

To drive site visitor traffic, NEEA is engaging Enervee's search engine marketing (SEM) efforts directed at zip codes in Energy Trust and Clark Public Utilities service areas, targeting a mixture of urban and rural demographics. In addition to refining site analytics, NEEA is exploring options with a handful of utilities to direct appropriate Northwest Marketplace visitor traffic to their product rebate offers or to existing utility marketplaces or rebate sites.

Over the coming two quarters, working in cooperation with utilities, NEEA will determine the future form, if any, for a Northwest Marketplace implementation beyond this technology scanning project. Progress updates will continue via informational packet memos to both RPAC and the Residential Coordinating Committee (RCC). Please share with others in your organization as needed, including your marketing/communications leads, and let NEEA staff know if you'd like more information or have questions about the project.

Please contact Steve Seminario sseminario@neea.org if you have questions about the Regional Online Marketplace.

PROGRAM LIFECYCLE STATUS



Memorandum – Informational Update



February 4, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Anouksha Gardner, Stakeholder Relations Manager (Coordinating Committees)
Eric Olson, Sr. Product Manager, Product Management (RETAC)
Jonathan Belais, Policy Manager (CEAC)

SUBJECT: Update on recent committee meetings (Q4 2024/Q1 2025)

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Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the Q4 RPAC meeting, or contact NEEA staff listed below.

Reminder: Effective 2025, the Integrated Systems Coordinating Committee is renamed to the Commercial & Industrial Coordinating Committee (CICC) and the Products Coordinating Committee renamed the Residential Coordinating Committee (RCC). The coordinating committees will skip the Q3 meeting and only meet three times a year.

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](#).

In the Q4 2024 (November 6 and 7), CICC meeting the committee focused on the following topic, which were identified by committee members as a regional priority for 2024: *Efficient Fan's Program Update* presented by NEEA's new Program Manager Alexis Muench and an ad-hoc discussion by committee members on *Managing Fluorescent Baselines and related Luminaire Level Lighting Controls Incentives*". During day 2 of the Q4 meeting, Committee members participated in an annual planning process to discuss 2025 regional priority topics. To see what transpired in Q4 at CICC, please see [agenda packet](#), [slides](#), and [notes](#) for detail. In the Q1 2025 (February 26 and 27) meeting, the CICC will focus on two regional priority topics: *Inform on key activities identified in NEEA's Market Engagement Plan for High-Performance HVAC*, and *Utility Custom Projects share out for Pump Energy Efficiency*. Committee members and NEEA Program Managers will also share out on current program highlights and other organizational updates. The Q1 meeting will be hybrid, hosted at NEEA's office.

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](#).

In the Q4 2024 (December 3 and 4th) meeting, the RCC focused on Consumer Products Retail Products Portfolio topic: *NEEA Insights on affordability with regards to Clothes Washers and Refrigerators* on day 1, and engaged in annual planning for 2025's regional priority topics on day 2. Committee members and NEEA Program Managers shared out on latest program highlights and other organizational updates. To see what transpired in Q4 at RCC, please see [agenda packet](#), [slides](#), and [notes](#) for detail. In the Q1 2025 (March 18 and 19) meeting, the RCC will cover Advanced Heat Pump topic: topic is still to be determined and will focus on either *Cold Climate/Peak management* or *a Comprehensive report on Low Load Efficiency*, and Heat Pump Water Heater topic: *a roundtable discussion on Utility Program Strategies and goals for 2025*. Committee members and NEEA Program Managers will also share out on current program highlights and other organizational updates. The Q1 meeting will be hybrid hosted at NEEA's office.

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

Regional Emerging Technology Advisory Committee (RETAC)

At the Q4 RETAC meeting, members of NEEA's Emerging Technology team provided updates on residential HVAC, residential and commercial water heating, and updates on consumer products, motors, pumps, and fans, and commercial HVAC efforts completed in 2024 and planned for 2025.

Christopher Dymond gave updates on residential HVAC efforts, including low load efficiency (investigation, lab testing, and field data analysis), rating representativeness comparison between test procedures, connected commissioning, cold climate performance, and a planned cold climate room heat pump field study. Christopher also provided an update on gas and dual fuel residential HVAC, including modeling of dual fuel systems and field testing iFLOW's dual fuel system, which integrates a heat pump with a high-efficiency tankless water heater for space heating. Planned 2025 residential HVAC efforts include developing a Northwest basecase for heat pump performance, whole home ductless solutions, dual fuel thermostat/controls optimization, and an AHRI 1380 update.

Wendy Preiser provided updates on NEEA's TV efforts and the progress towards an industry-wide voluntary agreement to provide energy use, commercial heat pump dryer lab test results, and the increased availability of all-in-one washer dryers with heat pump dryer technology. Kristen Aramthanapon presented updates on the DOE test procedure scope expansion and the beginning of investigations in Process Pumps. Chris Wolgamott then presented a field study integrating LLLC with HVAC controls in a commercial building to use the LLLC data to optimize HVAC controls, ongoing research to integrate hydronic systems in NEEA's high efficiency HVAC work, and improved testing and metrics for rooftop units (RTUs).

Finally, Dana Bradshaw gave updates on NEEA's heat pump water heater work, including residential product evaluation, a hot water innovation prize to support the development of an innovative split system HPWH, and updates on two central HPWH installs. Planned efforts for 2025 include HPWH accessory research on recirculation pumps, mixing valves, drain water heat recovery, continued research for central systems, and support of ENERGY STAR® efforts.

Resources / reference:

- 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](https://www.neea.org).
- The Q1 RETAC meeting is scheduled for March 13.

Please contact [Eric Olson](#) or [Alisyn Maggiora](#) with any questions about RETAC.

Cost-Effectiveness & Evaluation Advisory Committee (CEAC)

During the Q4 meeting on November 4, 2024, NEEA staff reviewed key assumption updates, provided updates on market research and evaluation activities, and review planned approach for the state code baseline review. The next meeting is March 6, 2025. During this meeting, NEEA staff will provide an update on the state code baseline review, changes to key assumptions, and market research and evaluation activities. Staff will also review key findings from the recently completed extended motor products market progress and evaluation report (MPER) and Montana residential and commercial code compliance reviews.

Recent meeting materials linked below:

- Q3 2024 Cost Effectiveness and Evaluation Advisory Committee [packet](#) and [slides](#).

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