

Q2 2025: Thursday May 22

9:00am – 12:00pm Pacific

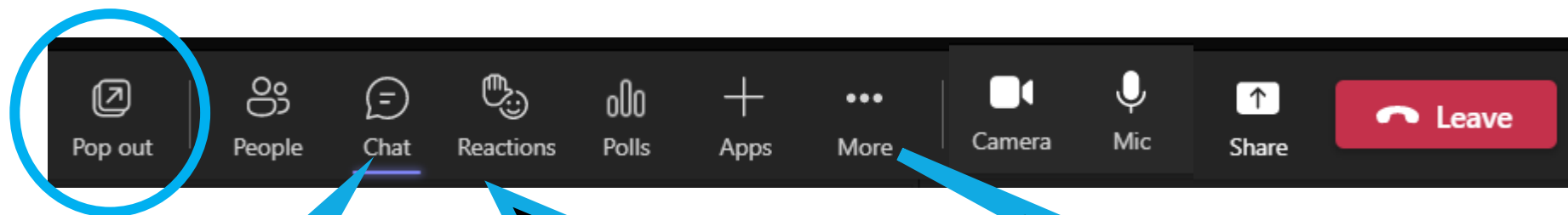
Hybrid @ NEEA's office

Regional Portfolio Advisory Committee





Tools for Today: Engaging on Teams

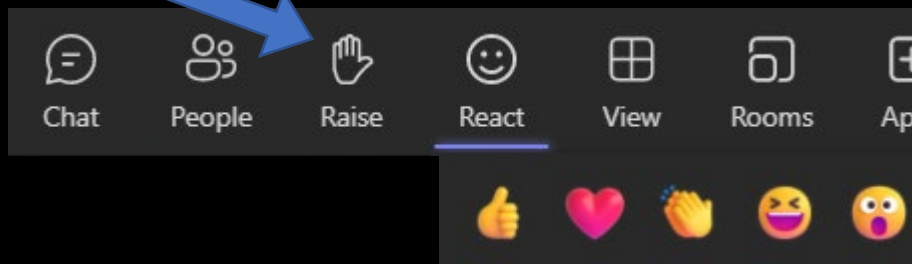
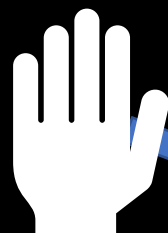


The chat is not captured automatically.

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

9:00-9:20am	Welcome, Introductions & Agenda / Packet Review
9:20-9:30am	Housekeeping and Looking Ahead
9:30-9:45am	Codes and Standards Update
9:45-10:15am	Electric Portfolio Update
15 min	<i>BREAK</i>
10:30-11:00am	RPAC+ :: 2025 HPWH Marketing Campaign Proposal
11:00-11:45am	Round Robin
11:45am-11:55am	Wrap-Up & Adjourn



Packet Review & Informational Updates

Tier 1: Agenda Items

- ✓ Codes & Standards Update (pg. 3)
- ✓ Electric Portfolio Update (pg. 4)
- ✓ 2025 HPWH Marketing Campaign Proposal (pg. 12)

Tier 2: Informational Updates

✓ NW Online Marketplace Update (pg. 13)

✓ BPA Market Snapshot Update (pg. 14)

✓ Recent Committee Updates (pg. 15)

New approach ✓ Market Progress Report (Program Updates) (pg. 18)

Tier 3: Additional Resources

- ✓ Recent RPAC materials, charters, functional newsletters (p. 2)



Introductions

- Name
- Organization
- *And...*

XX



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Housekeeping

- *Announcements*
- *Updates*
- *Reminders*





ENERGY STAR Update

Website Redesign Announcement

- **New Website Launch:**
May 2025
- **Key Features:**
 - Continued access to committee materials, documents, and meeting information
 - Simplified navigation for easier access to resources and reports



Stakeholder Survey Results – Key takeaways

1. **NEEA reports provide value** across all responding survey participants
 - a) 50% response rate across organizations.
 - b) When asked for the top 3 most important reports, ***every report was represented*** in the responses.

2. **Reports are shared beyond the immediate committee recipients.**
 - a) For example, one respondent said, *“All NEEA reports are published in our annual DSM Supplement, generally 50 - 70 reports annually.”*

Next Steps

- NEEA corporate communications team will continue efforts to centralize report development, with a focus on production efficiency and clear communications via our existing reports and respective cadence.
- No reports will be discontinued and there will be no changes to the frequency of reporting in 2025.

2025 RPAC Meeting Dates



QUARTER	DAY	DATE	TIME	LOCATION	KEY TOPICS
Q1	Tues	Feb 11	9:30-12	Virtual	2024 HPWH marketing campaign recap, Market Transformation highlight: TVs
Q2	Thurs	May 22	9-12	Hybrid @ NEEA (day after EFX)	Portfolio Update, 2025 HPWH marketing campaign proposal
Q3	Wed	Aug 20	Hold: 9-4	Virtual	HVAC Highlights, inform on gas addition for High-Perf HVAC/VHE DOAS, *ELECTIONS*: 2025 HPWH campaign
Q4	Mon	Nov 3	Hold: 9-4	Virtual?	TBD



= Proposed Hybrid / In-person Option

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



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Codes & Standards Update

Mark Rehley

Director – Codes, Standards, New Construction, Emerging Tech





Codes and Standards

Codes = Buildings



Standards = Appliances / Equipment





Federal Rule Making Activities

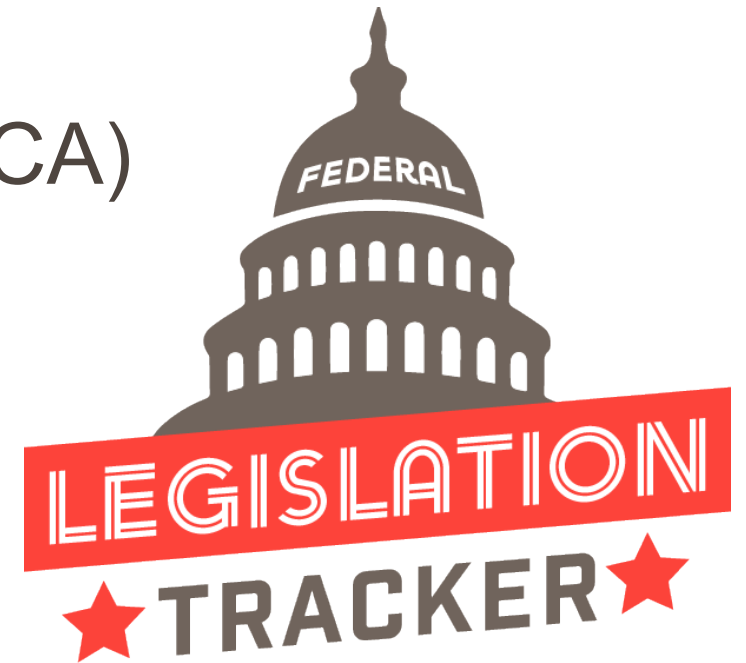
- **No new products** this year
- **Delays to existing**, 32 rules have been impacted, many potentially outside of statutory allowances
- **Process Rule Changes**





Legislative Activities

- Congressional Review Bills
 - Instantaneous gas water heaters
- Energy Policy and Conservation Act (EPCA)
 - House Bill
- Reconciliation Bill





Legal Activities

- Showerheads
- Manufactured Homes
- Gas cooktops
- Short cycling





Key Take Aways

- Standards increase affordability and choice
- Standards are well vetted
 - Existing standards have been fully analyzed, have been well vetted, and the products perform well compared to inefficient products.
- Standards are supported by manufacturers
- Standards are at risk from process, legislative, and legal challenges



Current Code Development



2024 Residential and Commercial Code – Proposal development and review



2024 IECC in consideration

2026 Residential is pre-proposal



2024 IECC in consideration





National Model Code

The 2027 International Energy Conservation Code (IECC) is currently under development, with a projected publication date of December 31, 2026.



Thank You!



Mark Rehley

Director – Codes, Standards, New Construction, Emerging Tech

Mrehley@neea.org



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Electric Portfolio Update

Stephanie Rider

Director - Portfolio Management, Reporting & Data Analytics



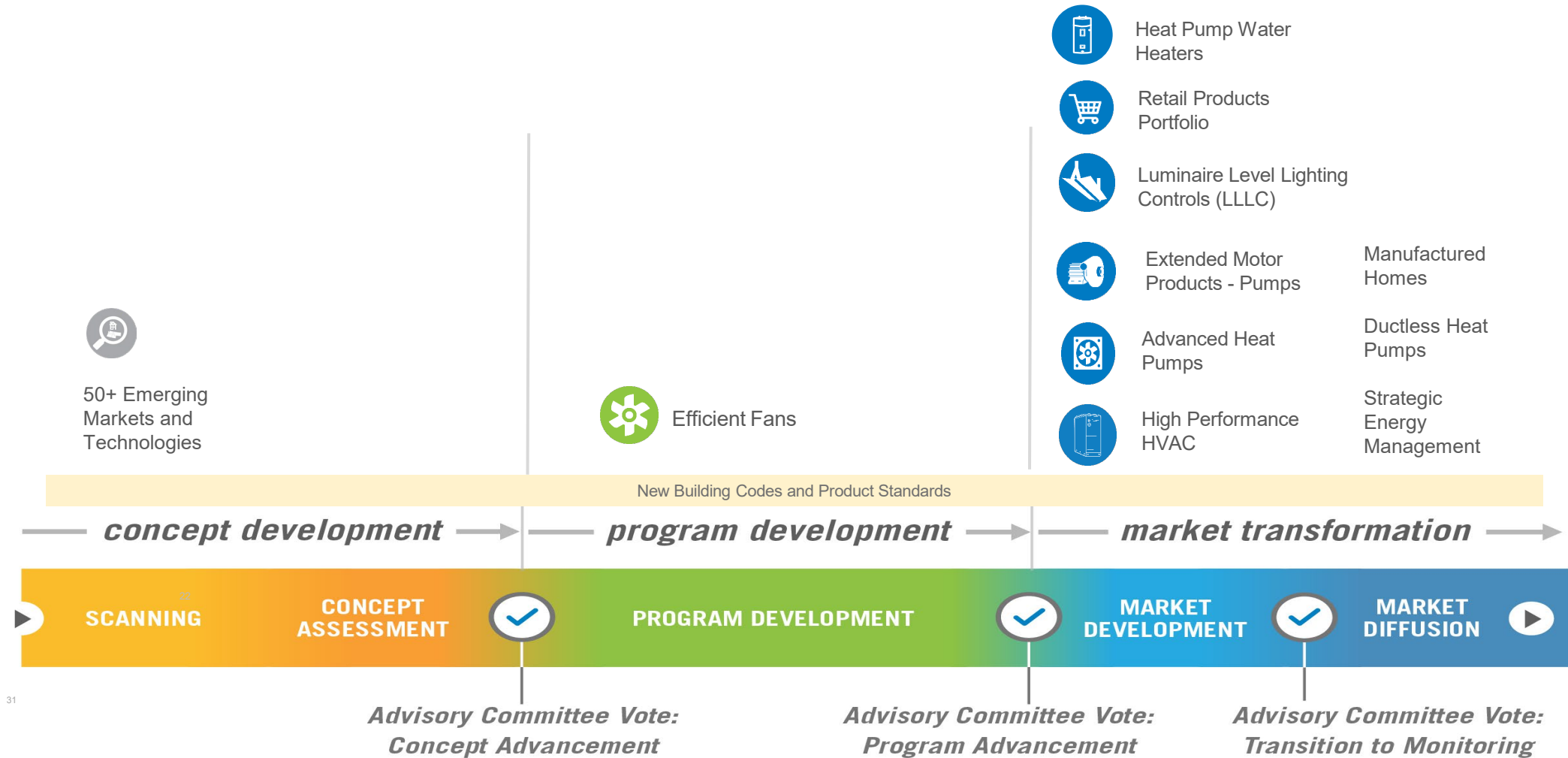
agenda

- Electric Portfolio Status: Cycle 6 concluded
Highlights and Energy Savings
- Electric Portfolio Outlook: Cycle 7 starting point
Considerations and Energy Savings



Electric Market Transformation Portfolio by Lifecycle Phase

Status as
of May
2025



31



Market Highlights – Cycle 6 (2020-2024)

Expanding market partnerships for lasting change

- **Efficient Pumps.** NEEA developed and institutionalized efficiency tiers for this market and continues to enroll distributors and manufacturer reps to change stocking and selling practices toward higher efficient pumps. A new partnership is opening doors in the Agricultural market
- **Luminaire Level Lighting Controls** moved from an unknown to a proven and accepted product in the market. LLLC products on the Design Lighting Consortium's qualified products list grew by 80% and the number of manufacturers offering qualified products more than doubled. As of 2024, these products are now included in industry design standards

Market share of smart pumps more than doubled to 25%

Inclusion in industry design standards drove 40-80% increase in sales last year



Market Highlights – Cycle 6 (2020-2024)

Developing more efficient products to expand consumer choice

- **Heat Pump Water Heaters** Tier 4 product introduced in 2020 delivers 67% more energy savings from the Tier 1 and addresses cold climate concerns. Tier 4 product is now >50% of total HPWH sales
- **Heat Pump Dryers**, a technology NEEA worked on in Cycle 5, now seeing successful commercialized ductless product that has addresses unmet needs in the space-saving all-in-one product category over the last 2 years

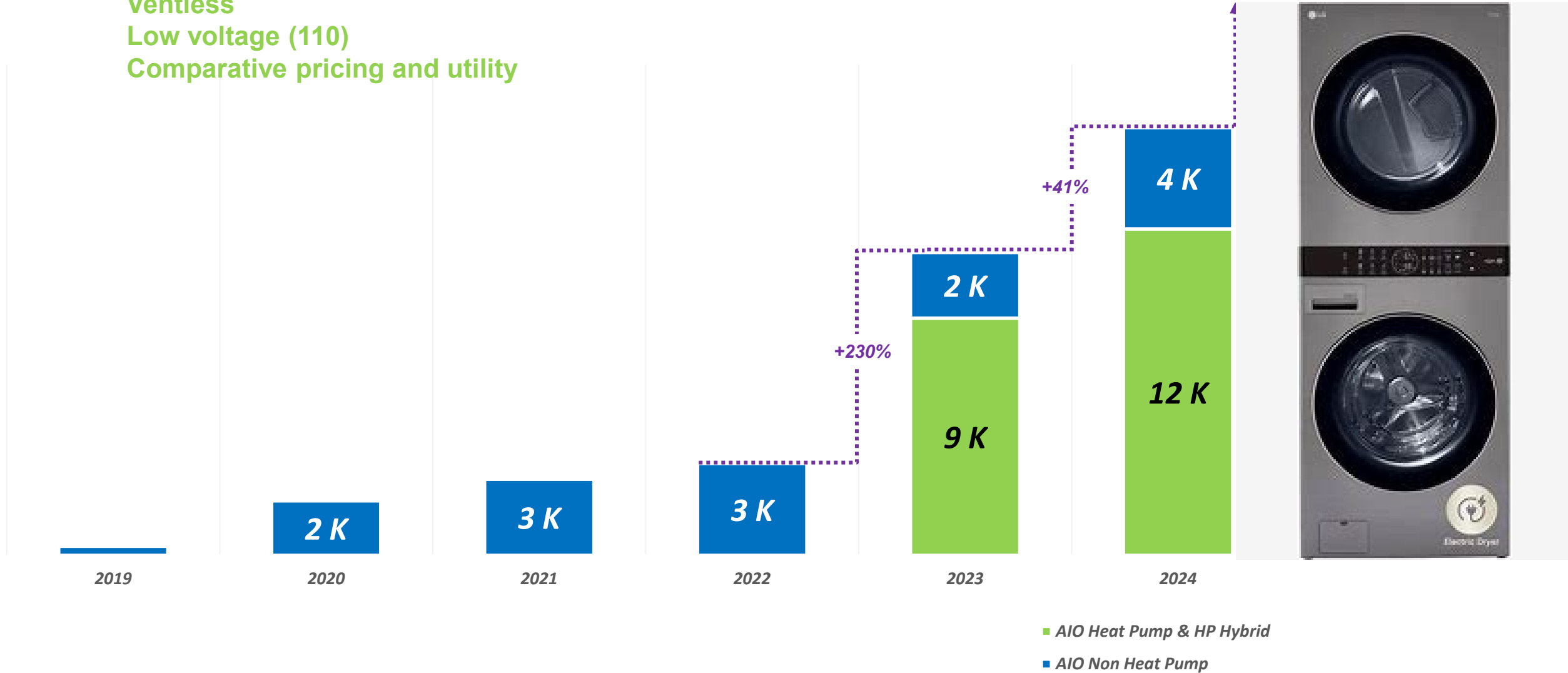
Delivers 67% more energy savings

5x growth of efficient all-in-one sales



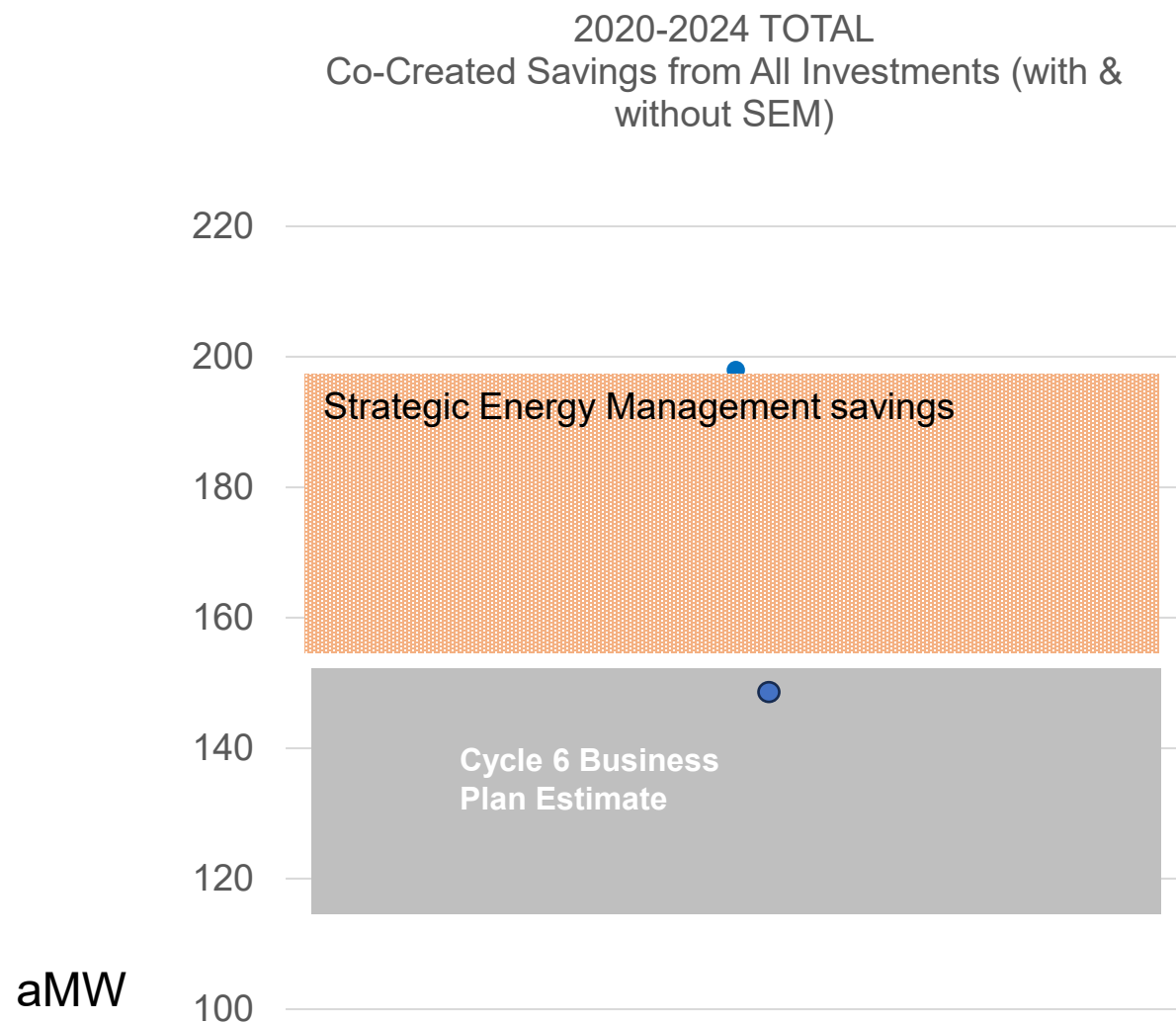
Residential Laundry: The Rise of Heat-Pump All-In-Ones ("AIO")

- Efficient heat pump technology
- Ventless
- Low voltage (110)
- Comparative pricing and utility





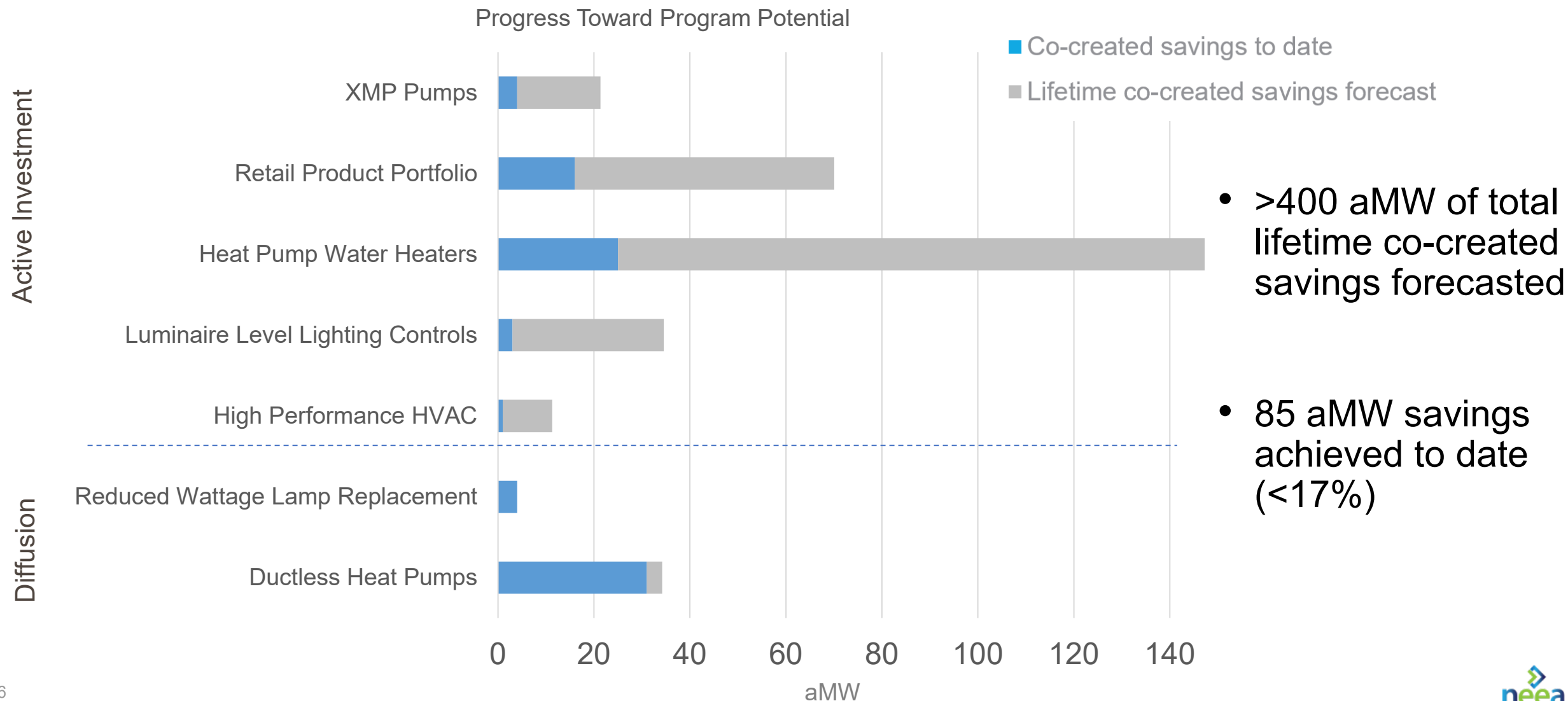
Cycle 6 (2020-2024) Energy Savings Realized



198 aMW of Energy savings were co-created in the region from the Market Transformation portfolio (2020-2024)



Majority of portfolio potential still ahead



agenda

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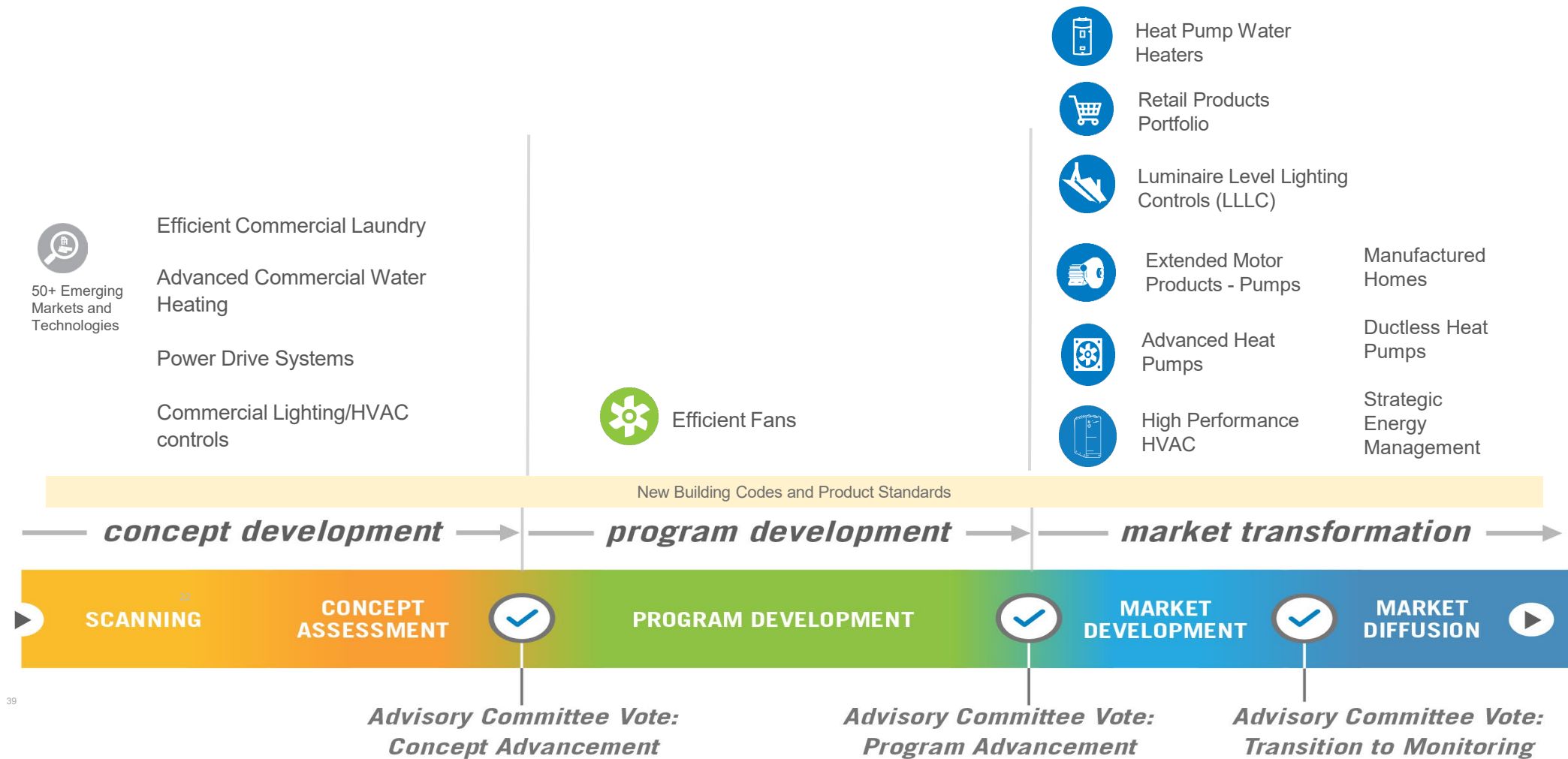
Cycle 7 (2025-2029)





Electric Market Transformation Portfolio by Lifecycle Phase

Status as
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2025



39



Portfolio Strategy for 2025/2026

- Leverage the portfolio that we have built over the last 5 years
- Looking for expansion and acceleration opportunities right now, where is there a faster, bigger path in what we already have built?
- New technologies for the portfolio are still being explored, with plans to advance new programs in mid-cycle

Portfolio Leverage: what's on the burner



Potential Areas for Program Expansion or Acceleration

Increasing our reach through new partner channels

New retail channels for consumer products

Adding heat pump water heater products into our RPP intervention strategies

Enrolling more participants across the region for LLLC and efficient pumps distribution, opening doors to new market segments

Creating product extensions

Expanding our LLLC program to include exterior lighting products

Exploring new heat pump all-in-one market

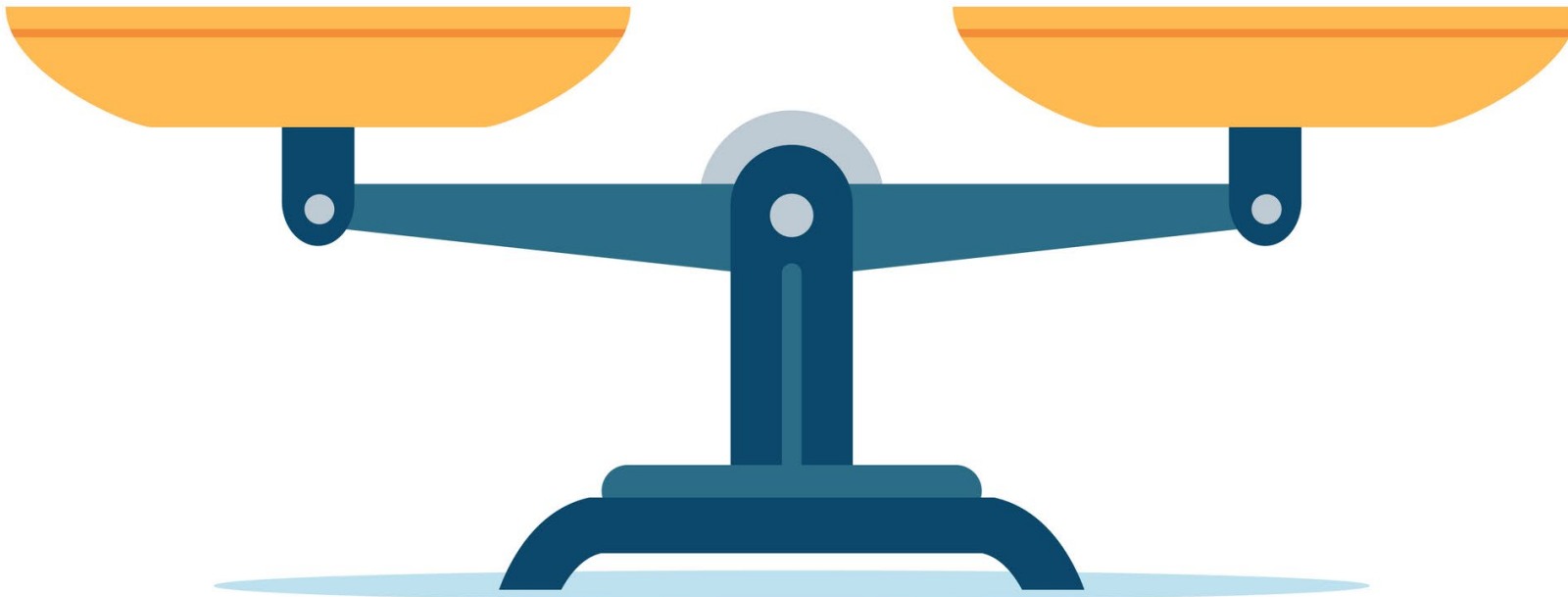
New specs and voluntary agreements across products in RPP



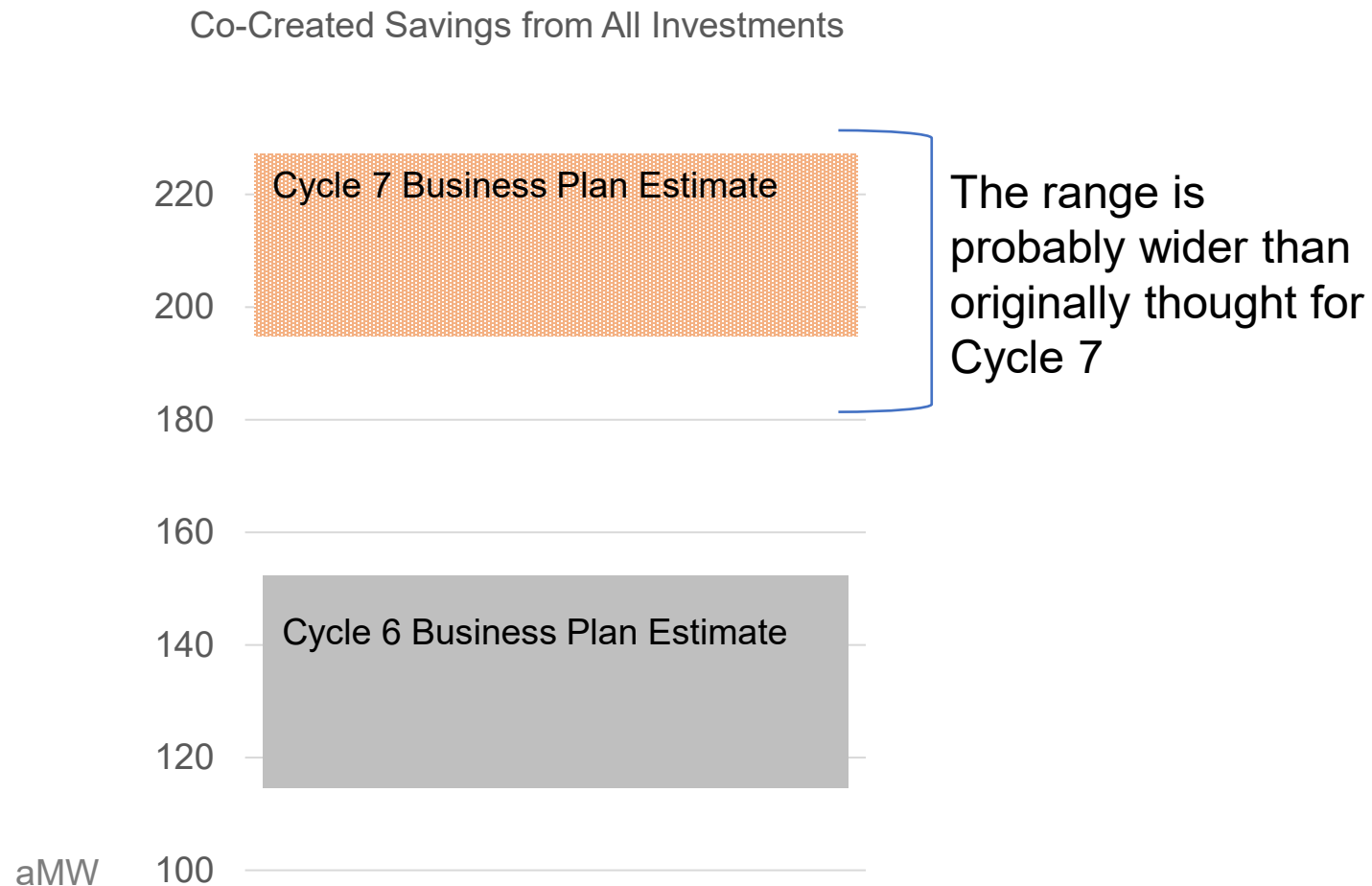
Netting against the external factors

- Mature portfolio with solid trajectory
- Strong market relationships
- Multiple expansion opportunities

- Rollbacks in federal product standards
- ENERGY STAR® being redefined
- Tariffs and economic conditions



Energy Savings Expectations



Leveraging a mature portfolio

About program acceleration and expansion more so than new growth areas right now

Navigating external risks

Thank You!



Stephanie Rider

Director - Portfolio Management, Reporting & Data Analytics

Srider@neea.org





BREAK!

***Please return by
10:30am (PST)***

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Quick Reminders

- High-level campaign overview only today
- 1:1 follow-up meetings between RPAC and NEEA Marketing, *as requested*
- Elections @ the Q3 RPAC on August 20



Proposed 2025 HPWH Consumer Campaign

Britt Cutsforth Dawkins

Manager - Program Marketing Strategy

May 2025





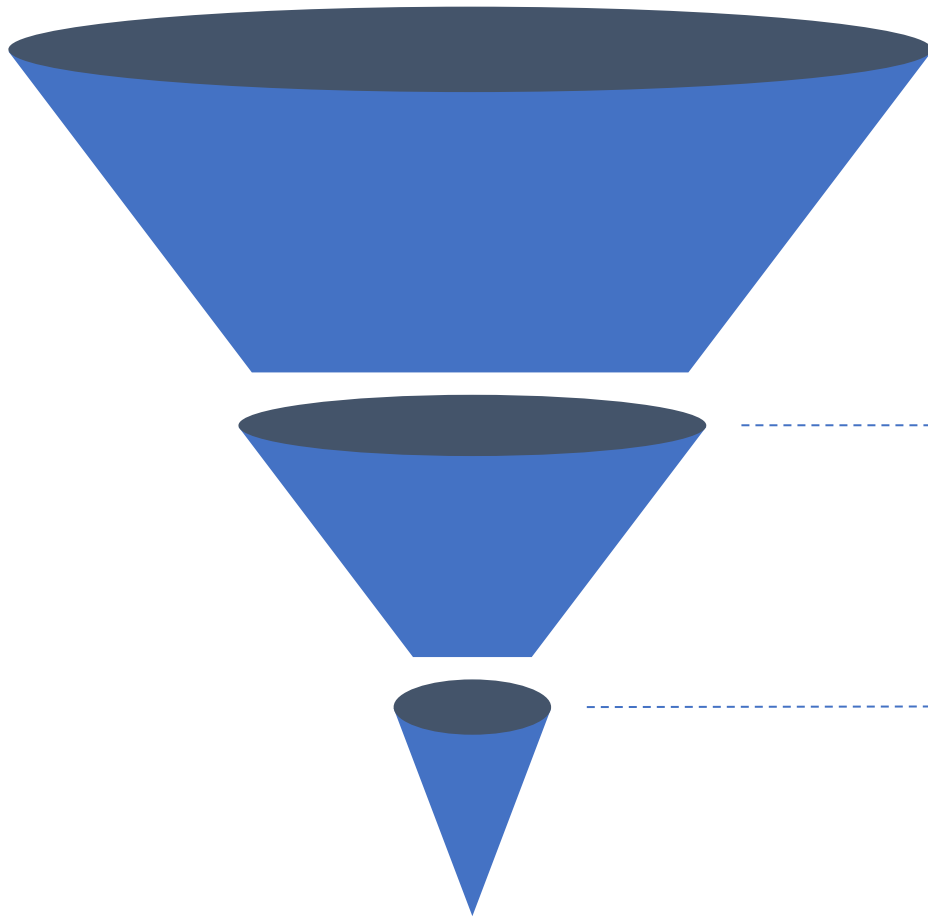
➤ *The Alliance + Downstream Marketing*

Per RPAC+ charter, the alliance engages in downstream marketing **when we identify strategic opportunity to drive market change**—in this case, for the purpose of increasing awareness and long-term end-user demand.

Consumer campaigns are **developed and vetted closely with the RPAC+ group to ensure regional alignment**. The alliance ran HPWH consumer campaigns in 2021, 2022, and 2024 with an increasing emphasis on targeting rural areas to ensure Market Transformation across the region. These campaigns have resulted in 300,000+ site sessions on Hot Water Solutions and increased Northwest interest in HPWHs.



The (Very Simplified!) Marketing Funnel



Awareness: Consumers are aware that HPWHs exist, but don't know much beyond that. As of 2021, the majority of consumers in the alliance's region (57%+) 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.

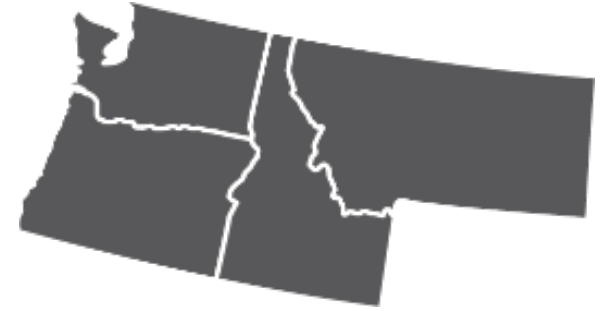
Conversion: Consumers understand the value of a HPWH and want one. They proactively ask for a HPWH when they need to replace their existing electric water heater.



Proposed 2025 HPWH Consumer Campaign



2025 Campaign Strategies



- Continue increasing Northwest awareness
 - Build on the existing 57% regional consumer awareness
 - Act on Market Research recommendations* to increase HPWH awareness specifically in more rural areas and areas with historically lower awareness and adoption rates
- Continue building consideration
 - Ensure Northwest consumers who have some level of existing awareness of HPWHs gain an increased understanding of the HPWH value proposition
 - Drive interest in—and ultimately, demand for—HPWHs
- Ensure alignment
 - Connect with funders as needed prior to the Q3 RPAC meeting in August 2025
 - Collaborate with mid- and upstream market actors during the campaign



2025 Campaign Overview

- Brand: Hot Water Solutions
- Timing: September through November 2025
- Channels: Social media, web banners, and digital audio
- Market: Idaho, Montana, Oregon, and Washington consumers
- Media spend: \$160K
- Calls-to-Action:
 - From ads: Drive to campaign landing page on HotWaterSolutionsNW.org
 - From landing page: Drive to utility websites, local installers, retailers, manufacturers



Campaign overview

*What's staying
the same?*

- Targeting Northwest consumers
 - Urban + rural homeowners in funder-approved ZIP codes with high levels of electric water heat and/or electric space heat
- Delivering awareness + consideration messaging
 - Awareness messaging to consumers who aren't yet aware of HPWHs but have demonstrated interest in home-focused content and interest in topics related to water heaters
 - Consideration messaging to consumers who have an existing awareness of HPWHs through engagement with Hot Water Solutions' campaigns or digital channels
 - Retargeting: Capture interested consumers who have engaged with the current campaign
- Level Up creative
 - Introduced in 2024 and designed to use the fun and recognizable look of retro video games to introduce consumers to the ultimate savings booster: heat pump water heaters

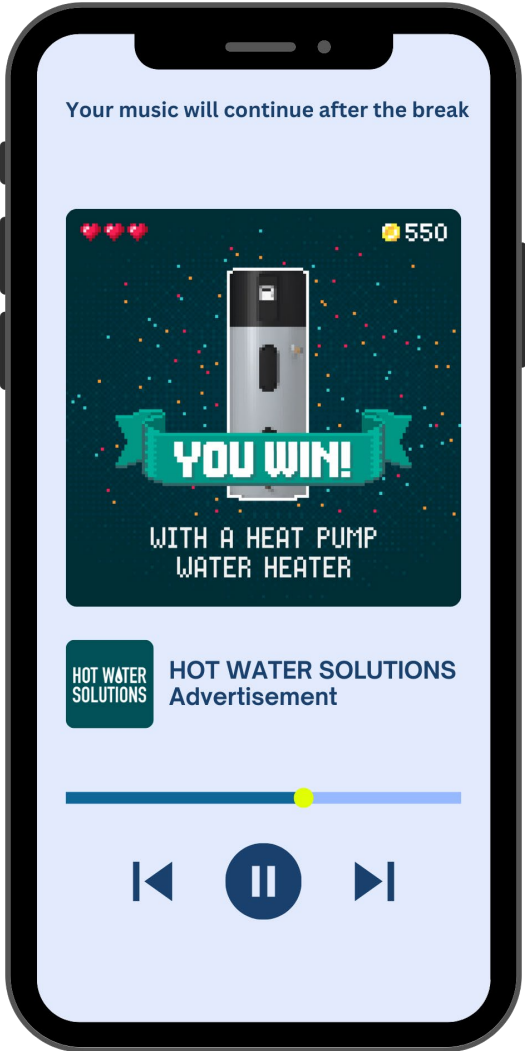
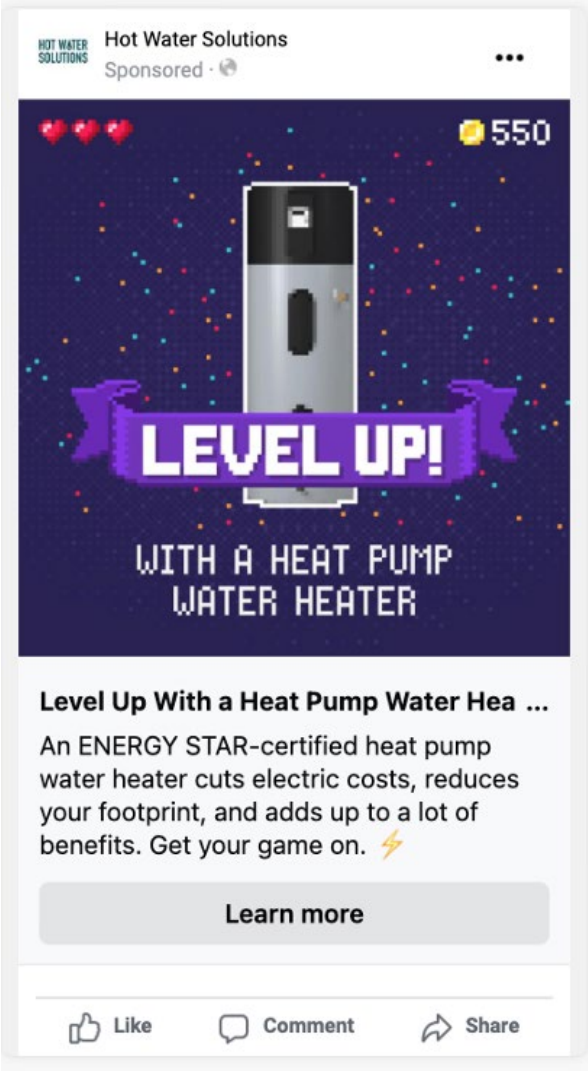
Campaign overview

*What's going to
be revised?*

- Testing secondary messaging
 - e.g., DIY installation and reducing energy waste
- Expanding reach
 - New channel: Digital audio platforms (e.g., Spotify, Pandora, or iHeart Radio) music and podcasts
 - New audience: Spanish version of ads and landing page
- Optimizing landing page experiences
 - Improved campaign landing page to increase engagement and time spent learning about the benefits of HPWHs
 - Consideration landing page to “welcome back” returning visitors



Creative Examples: Level Up



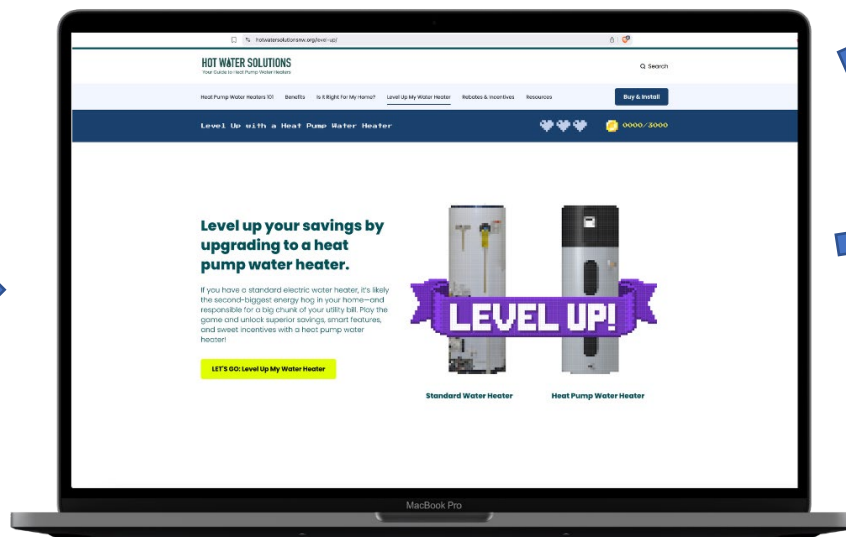


User Experience

MEDIA CHANNELS



CAMPAIGN LANDING PAGE



EDUCATION AND TRANSACTION

Local Utility



Local HPWH Installers



Retail Promotions/Mid-Stream



Manufacturers/Product Education





Timing and RPAC+ Process

Q2 2025

May 22

Q2 RPAC/RPAC+ meeting

- Provide overview of proposed 2025 consumer campaign

Mid-June

- Deliver proposed campaign messaging and materials for review

Q3 2025

July–early August

- Schedule and hold **as-requested 1:1 meetings** with RPAC members and their RPAC+ marketing staff

Mid-August

- Provide final campaign copy to funders prior to Q3 RPAC/RPAC+ meeting

August 20

Q3 RPAC/RPAC+ meeting

- Review of proposed plan, **funders make elections**

Late August–early September

- Self-delivering utilities to share their plans
- **Launch 2025 consumer campaign**
- Collaborate with supply chain actors throughout the campaign

Q4 2025

November

- Conclude campaign; reporting to follow at the Q1 2026 RPAC/RPAC+ meeting



Looking ahead: RPAC elections at the Q3 meeting

- Next steps

- Review the memo + information presented today with your internal staff
- Work with your “RPAC+” member to coordinate NEEA/utility marketing discussion, if desired
- Align on preferred approach (utility by utility)
- Engage in 1:1 campaign discussions with Alisyn and Britt, *as requested*

- Your election options

- **PARTICIPATE:** Funder supports NEEA conducting the planned marketing activity in its service territory



SELF-DELIVER: Funder opts to deliver the planned marketing activity in its service territory, in coordination with NEEA timing and activities



EXEMPTION: Funder does not support the planned marketing activity being conducted in its service territory

Thank You!



Britt Cutsforth Dawkins

Manager - Program Marketing Strategy

bdawkins@neea.org



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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



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A piece of brown paper with a string tied in a bow. The string is a light brown, twisted cord. It is tied in a bow that is centered on the right side of the paper. The bow has two loops, one pointing upwards and one pointing downwards. The string extends horizontally across the middle of the paper, and then vertically down the right side. The background is a solid, textured brown paper.

Let's wrap it up!



Action Items / Recap / Final Qs?



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...

➤ Q3 2025: Wednesday Aug 20 | Virtual

