

Regional Portfolio Advisory Committee



DATE: Wednesday, August 20, 2025

TIME: 10:00 – 2:00 Pacific

LOCATION: Virtual via Microsoft Teams

WEBINAR: [Click here to join the meeting](#) (Meeting ID: 236 788 123 294 6 | Passcode: 7T5ML9tw)
(if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 464 198 268#

AGENDA (All Times Pacific)

Page #

10:00-10:25 (25 min)	Welcome, Introductions, Agenda & Packet Review	All	1-2
10:25-10:40 (15 min)	2026 Operations Planning Process + Preview <ul style="list-style-type: none"> Operations Planning timeline Preview of portfolio focus areas for 2026 <p><i>Desired Outcome:</i> Committee aware of operations planning timing and what to expect.</p>	Emily Moore	3
10:40-11:05 (25 min)	Market Transformation Highlight: Commercial HVAC <ul style="list-style-type: none"> High-level results of 1st Market Progress Evaluation Report (MPER) for the High-Performance HVAC program Overview of recent progress with energy and heat recovery ventilation manufacturer representatives Update on exploration of expanding the High-Performance HVAC program to include gas heating systems <p><i>Desired Outcome:</i> This is an inform topic to build awareness of the market transformation progress to-date and a look ahead for future expansion potential.</p>	Dave Hammond	4
11:05-11:30 (25 min)	Northwest Online Marketplace Update <ul style="list-style-type: none"> Scanning project key learnings Potential pilot project currently under consideration <p><i>Desired Outcome:</i> Committee awareness of key learnings from scanning project and outline of future pilot currently under consideration.</p>	Steve Seminario	5
5 min	STRETCH BREAK TRANSITION TO RPAC+		
RPAC+ Marketing Elections			
11:35-12:00 (25 min)	Heat Pump Water Heater (HPWH) Marketing Campaign <ul style="list-style-type: none"> Review of proposed 2025 Level Up Consumer Awareness and Consideration Campaign RPAC Participation “Elections” (reference: RPAC Charter) <p><i>Desired Outcome:</i> Committee reminded of proposed marketing campaign optimizations; utility members cast elections on how they’ll participate in the regional campaign.</p>	Britt Cutsforth Dawkins	6
45 min	LUNCH BREAK		
12:45-1:35 (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 Policy directives w/ customers Findings, filings, IRPs 	All	--

1:35-1:55 (20 min)	Housekeeping and Looking Ahead <ul style="list-style-type: none"> • Updates <ul style="list-style-type: none"> ○ One Big Beautiful Bill, ENERGY STAR, & Standards • Announcements & Reminders <ul style="list-style-type: none"> ○ Nominate today! Leadership in Energy Efficiency Awards ○ Efficiency Exchange 2026: Submit topics 9/15-10/24 ○ Upcoming Meetings: Q4 + 2026 draft dates <p><i>Desired Outcome: Committee aware of recent developments and upcoming topics for engagement.</i></p>	Alisyn Maggiora Jonathan Belais Mark Rehley	--
1:55-2:00 (5 min)	Wrap-Up & Adjourn	Alisyn Maggiora	--

Informational Updates:

- **Page 7:** NEEA Special Projects Update (End Use Load Flex and Whole Buildings)
- **Page 8-9:** Q2/Q3 Committee Updates
- **Page 10-22:** Q2 2025 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Reference Materials:

- **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.

- Q2 2025 RPAC meeting [packet](#), [slides](#) and [notes](#)
- **Charters:** [RPAC](#), [CEAC](#), [RETAC](#), [Coordinating Committees](#)

- **Latest Functional Newsletters:**

- Q2 2025 Newsletter – [Market Research and Evaluation](#)
- Q2 2025 Newsletter – [Emerging Technology](#)
- Q1 2025 Newsletter – [Codes, Standards and New Construction](#)

2025 RPAC MEETING DATES:

QTR	DAY	DATE	TIME (pst)	LOCATION	KEY TOPICS
Q1	Tues	Feb 11	930-12	Virtual	2024 HPWH marketing campaign recap, Market Transformation highlight: TVs
Q2	Thurs	May 22	9-12	NEEA / Hybrid (day after EFX)	Portfolio Update, 2025 HPWH marketing campaign proposal
Q3	Wed	Aug 20	10-2	Virtual	HVAC Highlights, inform on gas addition for High-Perf HVAC/VHE DOAS, ELECTIONS: 2025 HPWH marketing campaign
Q4	Mon	Nov 3	HOLD: 9-4	Virtual (hybrid if interest & host)	TBD

Memorandum – *Agenda item (Tier 1)*



August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Moore, Director, Market Strategy & Execution

SUBJECT: 2026 Operations Planning Process and Preview



Brief Overview:

NEEA staff have begun developing the 2026 Operations Plan and want to ensure RPAC members are aware of the process and the upcoming timeline for stakeholder engagement and feedback.

The 2026 process and Operations Plan deliverable will be very similar to years past and will culminate in Board approval at the December 8th Board meeting.

Here are the key dates for stakeholder review of the Operations Plan that RPAC members should be aware of:

- 10/14: Draft 2026 Operations Plan shared with regional stakeholders
- 10/16: Webinar meeting held to review the draft Operations Plan
- 10/30: Feedback is due to NEEA

In the Q3 RPAC meeting, we'll review the timeline and key focus areas expected in the 2026 plan. Please raise any questions you have at the meeting, or contact [Emily Moore, emoore@neea.org](mailto:emoore@neea.org).

Memorandum – *Agenda item (Tier 1)*

August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Dave Hammond, Sr Program Manager
SUBJECT: Market Transformation Highlight – Commercial HVAC



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 Overview:

This market transformation highlight of the High-Performance HVAC program includes updates on the recently completed 1st Market Progress Evaluation Report (MPER), ongoing progress with manufacturer representatives, and the exploration of expanding the program to include gas heating systems.

The key takeaways from the MPER include confirmation that the Very High Efficiency DOAS (VHE DOAS) system design is recognized as compatible with best practices by specifiers, but adoption is limited due to a range of market barriers. Results also suggest:

- VHE DOAS is gaining traction, but adoption is difficult to measure.
- In the region, designers who work in Washington are more likely to include VHE DOAS in their HVAC designs.
- NEEA's trainings are a valuable resource for spreading awareness and encouraging deeper engagement with VHE DOAS.

The 2nd aspect of this presentation addresses the progress made with manufacturer representatives associated with the High-Performance HVAC program. This includes the expansion of compliant Energy and Heat Recovery Ventilation (ERV & HRV) products to 180+ unique models and increased active participation of representatives promoting the VHE DOAS system design via sales trainings, marketing campaigns and growth into new territory within the Northwest region.

The final aspect is the ongoing exploration of expanding the High-Performance HVAC program to include gas heating systems (specifically condensing gas boilers). The potential benefits of establishing a fuel-neutral program include broadening the target audience, reducing confusion and complexity when presenting program benefits to designers and increasing the appeal to manufacturers and manufacturer reps. Pending the results of the current potential market impact research, the High-Performance HVAC team anticipates the potential program expansion could occur by Q2 2026. This would be brought to the Natural Gas Advisory Committee (NGAC) for advancement in the gas portfolio and allocation of gas funding.

Please contact [Dave Hammond \(dhammond@neea.org\)](mailto:dhammond@neea.org) if you have questions about the High-Performance HVAC Program.

PROGRAM LIFECYCLE STATUS



Memorandum – *Agenda item (Tier 1)*



August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Steve Seminario, Market Transformation Manager, Consumer Products

SUBJECT: Northwest Online Marketplace (Enervee): Scanning Results & Next Steps

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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 Overview:

NEEA is approaching the completion of a 14-month scanning project and evaluation of Enervee through an implementation called Northwest Marketplace (nw.enervee.com). During the Q3 RPAC meeting, NEEA staff will share key learnings from this project and outline the structure of a future pilot under consideration by NEEA.

Context:

The market transformation opportunity with the Northwest Marketplace is to raise the energy efficiency of Northwest consumer product purchases by proving an easy way to find, evaluate, compare and source energy efficient products. The scanning project included building an Enervee-based northwest online marketplace, driving traffic to the site using search engine marketing and then evaluating the results. During the project NEEA staff also had the opportunity to demonstrate and discuss the platform's potential in over 20 direct conversations with some alliance funders.

During the scanning project, search engine marketing drove visitor traffic from Energy Trust and Clark PUD zip codes. NEEA staff worked with Enervee to optimize the implementation, measured results using web site traffic analysis tools, and experimented with matching site-influenced purchases with NEEA's Retail Product Portfolio (RPP) retail product sales data.

As envisioned, visitors used the site to find, evaluate, compare and source efficient products across 19 product categories and then navigated to a range of supported retailers to consider purchasing those products.

Through learnings from the scanning project, discussions with alliance funders and interaction with Enervee, NEEA staff were able to define an expanded and utility-customized set of capabilities to offer in a multi-year pilot; the objectives of this pilot would be to test the viability of NEEA's market transformation goals and allow participating funders to evaluate the value of the platform to their customers. As part of the 2026 Operations Planning process, NEEA staff are determining if, and at what level, a pilot will be funded and subsequently, collaborating with interested alliance funders to determine if and how they would like to participate.

Please contact Steve Seminario sseminario@neea.org if you have questions about the Northwest Marketplace or the future Enervee-based Pilot currently under consideration.

Memorandum – *Agenda item (Tier 1)*



August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Britt Cutsforth Dawkins, Senior Manager, Marketing Strategy

SUBJECT: Proposed Level Up HPWH consumer marketing campaign

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Our Ask of You:

Review the summary information below and come prepared to cast an “election” on how your utility will engage with the *Level Up* HPWH marketing campaign.

Per the [RPAC+ process](#), NEEA staff will seek utility (including Energy Trust and BPA) elections at the Q3 RPAC/RPAC+ meeting on August 20, 2025. Election options include “participate”, “self-deliver”, or “exempt” for the 2025 *Level Up* campaign.

Background/Context:

The proposed 2025 *Level Up* HPWH marketing campaign was presented at the [Q2 2025 RPAC/RPAC+](#) meeting in May 2025.

The *Level Up* campaign was initially developed and vetted closely with the RPAC+ group in 2024. It ran the same year to 1) continue to raise consumer awareness and 2) increase consideration of HPWHs across the region. The [2024 campaign was a success](#), resulting in more than 24 million impressions across the target audience and more than 140,000 site sessions to the *Level Up* campaign landing page. Given the impact of the 2024 campaign, NEEA staff proposed running it again in 2025.

Campaign Overview:

The overall *Level Up* campaign strategies remain the same as in 2024, but optimizations are recommended to improve engagement, including testing new secondary messaging to better understand what HPWH messaging consumers find compelling, expanding the campaign’s reach with new marketing channels (digital audio platforms, NextDoor) and Spanish-language ads, and optimizing the campaign landing page.

The popular 8-bit gaming creative, broad Northwest targeting, campaign duration, and media spend also remain the same as in last year’s campaign. The proposed timing for this year’s *Level Up* campaign is Q4 2025.

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

Memorandum – *Informational (Tier 2)*



August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Moore, Director – Market Strategy & Execution

SUBJECT: Special Projects Update: End Use Load Flex & Whole Buildings

Our Ask of You:

Please review the memo and bring any questions, recommendations, or feedback to the Q3 RPAC meeting on August 20, or contact me at the email below.

Brief Overview

NEEA's special projects fall outside of NEEA's core work and funding, and thus, are overseen by NEEA's board and a dedicated steering committee comprised of representatives from those alliance members funding that effort. As these projects grow and continue to leverage / intersect with NEEA's existing core program efforts, periodic (approximately annual) updates are shared with the RPAC for purposes of cross-sharing and awareness.

End Use Load Flex

Launched in Jan 2024, the End Use Load Flex Special Project seeks to catalyze innovation and Market Transformation towards a more flexible and reliable energy system. The near-term goal is to expedite the integration of features that enable end-use load flexibility and gain insight into related opportunities. Although the initial focus will be on residential end-use technologies, future activities may extend to commercial/ non-residential end-use applications. Based on results and learnings from the project to-date, the team is currently proposing a 4-year strategic and business plan to continue the effort and build out an End-Use Load Flexibility Market Transformation Portfolio through 2029.

Primary steering committee members include: Matt Babbitts (Clark), Tyler Boehringer (Emerald), Suzanne Frew (Snohomish), Jennifer Finnigan (Seattle), Laura James (Pacific Power), Cam LeHouillier (Tacoma), Meghan Pinch (Avista), Tom Smith (PSE), Drew Thompson (Chelan), Lisa Timmerman (PGE)

Whole Buildings

Launched in Jan 2025, the Commercial Whole Building Special Project is creating a regional, market-focused approach to offer meaningful support to building owners, while creating an unprecedented pipeline of efficiency projects. Especially for the many under-resourced building owners throughout the region, there is a significant opportunity to increase access to, and awareness of, the technologies, financial pathways, and practices that maximize value while exceeding performance targets. The project seeks to motivate the commercial building sector to undertake deep energy efficiency retrofits in a way that is widely accessible, scalable, and affordable for owners and occupants.

Primary steering committee members include: Bill Hibbs (Clark), Shelly Carlton (Energy Trust), Orion Eaton (Snohomish), Nitin Manchanda (Tacoma), Elaine Markham (Seattle), Chris Boroughs (PSE), Eric Mullendore (BPA).

Please contact [Emily Moore](mailto:EMoore@neea.org) EMoore@neea.org if you have questions about either of these special projects.

Memorandum – Informational Update



August 13, 2025

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Anouksha Gardner, Stakeholder Relations Manager (Coordinating Committees)
Mark Rehley, Director – Codes, Standards, New Construction, Emerging Tech (RETAC)
Jonathan Belais, Policy Manager (CEAC)

SUBJECT: Update on recent committee meetings (Q2/Q3 2025)

Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the upcoming 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 Q2 2025 (May 13) virtual CICC meeting, the committee focused on the following topics, which were identified by committee members as a regional priority for 2025: *How the Luminaire Level Lighting Controls Program (LLLC) Leverages Champions* presented by NEEA's Marketing Manager Katherine Gifford and Kate Bushman from Kate Bushman Advising. The committee also participated in a regional roundtable share-out on organizational and programmatic updates and offered feedback on the Q4 regional priority topic (see below). To see what transpired in Q2 at CICC, please see [agenda packet](#), [slides](#), and [notes](#) for detail.

In the Q4 2025 (November 4 & 5) meeting, the CICC will focus on the regional priority topic: *Efficient Fans Program Updates*. Committee members and NEEA program managers will also share out on current program highlights and other organizational updates and participate in the annual planning process for 2026 topics. The Q4 meeting will be virtual.

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 Q2 2025 (June 26) virtual meeting, the RCC heard from Manufacturers of Heat Pump Water Heater (HPWH) (Bradford White, AO Smith, & Rheem) in a panel style presentation on the topic *Heat Pump Water Product Review and a roadmap to the 2029 HPWH Standard* facilitated by NEEA Sr. Program Manager Emily Rosenbloom. Committee members also engaged in a regional roundtable discussion on organizational and program updates, and a check in on the Q4 regional priority topic. To see what transpired in Q2 at RCC, please see [agenda packet](#), [slides](#), and [notes](#) for detail.

In the Q4 2025 (December 1 & 2) meeting, the RCC will cover program updates on *Retail Product Portfolio*. Committee members and NEEA program managers will also share out on current program highlights and other organizational updates and participate in the annual planning process for 2026 topics. The Q4 meeting will be virtual.

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

Regional Emerging Technology Advisory Committee (RETAC)

At the Q2 RETAC meeting, as part of a round robin, the committee members shared their areas of research and completed projects. NEEA staff shared highlights and learnings from the ACEEE Hot Air / Hot Water Forum and Efficiency Exchange. A summary of the projects and updates are included in the notes from the meeting.

The Q3 meeting is scheduled for September 24. Focus areas include a share-out from PSE on their technology research and committee round robin. Oakridge National Lab will be the focus of the Q4 meeting.

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.

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

Cost-Effectiveness & Evaluation Advisory Committee (CEAC)

The next meeting (Q3) is scheduled for August 27, 2025. During this meeting, staff will provide a brief update on in-progress market research and (MRE) activities and an overview of recently published Market Progress Evaluation Reports (MPERs) for Efficient Rooftop Units (ERTUs) and High-Performance HVAC. The MRE team will also cover a recently completed Oregon Residential Code Compliance Study. The committee will have the opportunity to discuss the final recommendations from the Code Baseline and Key Assumption Review. NEEA staff will provide some early estimates and expected metrics for the Dual-Fuel Residential HVAC program and answer questions on a few minor updates to key assumptions located in the meeting packet.

Recent meeting materials linked below:

- Q2 2025 Cost Effectiveness and Evaluation Advisory Committee [packet](#)

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

Market Progress Quarterly Report

Residential



**Retail Products
Portfolio**



**Heat Pump Water
Heaters**



**Advanced Heat
Pumps**

Commercial and Industrial



High Performance HVAC



Extended Motor Products



Efficient Rooftop Units



Efficient Fans



**Luminaire Level Lighting
Controls**



**Advanced Commercial
Water Heating**

Infrastructure



BetterBricks

Residential

Initiative Name					
Manager		Fuel Type		Initiative Goal	
Consumer Products Product Group	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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Advance television savings opportunity by growing ENERGY STAR v 9.1 market share, continuing to monitor the voluntary agreement and ensuring the TV test procedure is augmented as needed.	Implement a national incentive program with other ESRPP program sponsors.	Implement a regional program to support ENERGY STAR TVs.	Action required	Due to federal program uncertainty, a major TV retailer postponed participation in the incentive program with ESRPP resulting in a pause on incentives for ENERGY STAR TV's. The team is exploring other avenues to support TV savings while continuing to secure the third TV retailer required to provide incentives.
	Advance refrigerator savings opportunity by supporting energy-efficient technologies, leveraging data for future comments on test procedures and ENERGY STAR specifications.	Ensure final draft of ENERGY STAR specifications includes key NEEA recommendations.	Provide data and comments for ENERGY STAR refrigerator specifications.	Action required	ENERGY STAR specification advancement is on pause. Research to develop future test procedure recommendations that recognize savings for adaptive technologies has been scoped.
	Advance laundry savings opportunity by leveraging data for future comments on test procedures and ENERGY STAR specifications.	Ensure draft of ENERGY STAR specifications includes key NEEA recommendations.	Provide data and comments for clothes washer ENERGY STAR specifications.	Action required	ENERGY STAR specification advancement is now on hold. Therefore, the team has shifted focus to reducing barriers to heat pump dryers. A statement of work is complete on research to assess potential consumer acceptance barriers to heat pump dryers. Additionally, the team anticipates lab testing to begin Q3. The team is also in discussions with a major manufacturer and university research team to develop quick dry heat pump dryer technology.
	Grow and strengthen ESRPP program through sponsor evaluation support, targeted recruitment and retention activities.	Begin implementing activities identified in the evaluation support plan by Q3.	Draft plan for ESRPP evaluation support by Q2.	On target	The contractor has had initial conversations with ESRPP sponsors to determine what types of tools will be helpful for them to support their evaluations. The contractor is in process of synthesizing the feedback and developing recommendations for appropriate tool development. These tools will be developed in Q3 and Q4.

Residential

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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Increase confidence and technical capability of HPWH installers in the Northwest for single family and low-rise family applications	Increase number of installation companies listed on Hot Water Solutions by 25%.	Increase number of installation companies listed on Hot Water Solutions by 15%.	Action required	In Q2, the program made progress in expanding the Installer Finder, particularly in underrepresented regions. Following targeted outreach in Idaho, a new installer serving Post Falls and the surrounding areas was added to the list. Additionally, a well-known plumbing contractor serving the Portland area was onboarded. Since the beginning of the year, six new installers have been added to Hot Water Solutions, representing a 5% increase. Efforts to grow the installer network will continue throughout the year through direct outreach to contractors and ongoing collaboration with distributor partners, with a focus in Southern Oregon. However, as recruitment has been slower than expected, the program is currently not on track to meet its annual target or threshold.
	Leverage national and extra regional partnerships to increase consistent adoption of HPWHs nationally to ensure market readiness for the 2029 federal standard.	Strengthen strategic relationships with five national or extra regional organizations.	Strengthen strategic relationships with two national or extra regional organizations.	On target	In Q2, the program took important steps toward building national engagement around heat pump water heater (HPWH) adoption. Through NEEA's sponsorship of the Advanced Water Heater Initiative (AWHI), HPWH efforts across the country are being mapped, highlighting region-specific barriers, opportunities, and key actors. The work is expected to be completed by the end of the year and will inform NEEA's engagement strategy in 2026. Additionally, the program identified the Tennessee Valley Authority (TVA) as a key extra-regional organization and held an initial meeting to explore opportunities for mutual support in advancing HPWH adoption. A follow-up meeting with additional TVA staff is scheduled for Q3.8

Residential

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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Increase customer awareness and demand among populations with low adoption.	Identify two low adoption populations in the Northwest and document baseline, barriers and opportunities.	Identify one low adoption population in the Northwest and document baseline, barriers and opportunities.	On target	Significant progress was made in Q2 and the program is on target to meet this goal. Leveraging data from the Regional Building Stock Assessment (RBSA), Environmental Systems Research Institute (ESRI), and distributor sales, NEEA’s Market Analyst team developed and reported preliminary sub-regional metrics for heat pump water heater adoption. In addition to this foundational analysis, the team conducted a deeper dive into the characteristics of populations and market conditions in areas with low adoption. This included examining demographic, housing, and geographic factors—such as household income, housing stock age, and urban versus rural distribution—to better understand the underlying drivers of adoption variability. These insights are helping to identify which low-adoption areas show strong potential for future growth. Building on this work, the program will continue in Q3 by refining the analysis to define specific population segments, along with their baseline adoption rates, and the key barriers and opportunities influencing heat pump water heater adoption.

Residential

Initiative Name					
Manager		Fuel Type		Initiative Goal	
HVAC Product Group	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.
	2025 Operations Plan Milestones		Target		Threshold
					Status as of 8/11/2025
				Comment	
Increase support from regional and national partners for inclusion of NEEA's priority heat pump improvements in specifications, qualified products lists, product development, and standards reporting.		Facilitate adoption of at least one improvement by two or more target partners, such as in CEE, EPA and RTF, in specifications, manufacturers in product positioning, and in utility or efficiency programs.		Facilitate adoption of at least one improvement by one or more target partners.	
Refine savings rate confidence and metrics that can be used for NEEA savings tracking and to convey value proposition to the market.		Complete field data analysis with final report and future field study defined.		Complete field data analysis.	
Establish clear, consistent priority heat pump improvement messaging and value propositions for program partners and target audiences.		Publish program communications resources for at least five improvements on BetterBuiltNW.com.		Develop program communications resources for at least three improvements.	

Commercial and Industrial

Initiative Name					
Manager		Fuel Type		Initiative Goal	
HVAC Product Group	High-Performance HVAC / Very High Efficiency Dedicated Outside Air Systems (VHE DOAS)		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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Promote system approach and highlight value proposition (including non-energy benefits) throughout the supply chain.	Complete at least 10 awareness or educational efforts that target supply chain audiences.	Complete at least seven awareness or educational efforts to target supply chain audiences.	On target	The program hosted a building tour highlighting the benefits of Very High Efficiency DOAS (VHE DOAS) at the Galleria Building during the Efficiency Exchange conference. Additionally, the University of Washington Integrated Design Lab presented on VHE DOAS to the local Seattle design community through two events in late Q1 (not included in the previous program update). Through Q2, the program has completed seven educational efforts and is on track to complete at least ten awareness or educational efforts throughout 2025.
	Increase availability of lower cost qualifying E/HRVs.	Work with manufacturers to release at least two new capacities or two new price points.	Work with manufacturers to release at least one new capacity or one new price point.	On target	The program added 12 new products to the compliant products list in Q2, bringing the total new products to 65 in 2025. Nine of the new products added in Q2 are from the manufacturers that typically come in at lower price points among the nine manufacturers on the compliant products list.
	Build support for NEEA's proposed code changes.	Ensure key elements of NEEA's code change proposal are incorporated in the draft code language published by ASHRAE 90.12025 and/or 2027 IECC.	Code development committee voting margins for NEEA's proposal are closer to approval than for the analogous 2024 IECC proposal.	Heads up	The team submitted a code change proposal for 2027 IECC to require DOAS for some commercial building types. In Q1, this proposal was recommended for disapproval by the commercial HVAC subgroup by a vote of 6-3 (with 2 abstentions) and was officially disapproved by the main consensus committee vote in late-May. While the proposed language was not accepted into the draft code, the threshold for this goal was met. The HVAC subcommittee vote for the analogous 2024* IECC proposal was 0-14 (with 4 abstentions).

Commercial and Industrial

Commercial and Industrial					
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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Encourage manufacturers to develop and promote efficient RTUs for the light commercial market.	Work with a minimum of four manufacturers to develop new eligible equipment, two new price points, or two expanded product lines that serve the light commercial market.	Work with a minimum of two manufacturers to develop new eligible equipment, or one new price point, or one expanded product line that serves the light commercial market.	On target	Met with Greenheck to discuss their new RTU line which incorporates better enclosure insulation and improved efficiencies. Product was specifically developed to be better than code-level RTUS, but more economically than a DOAS-type product. Working with the team to get the product line on the ERTU compliant product list. Working with CaptiveAire to add equipment to the compliant product list. Continuing to work with manufacturers that are exploring additional products that would contribute as progress to this goal, including Lennox, JCI/York, and KCC (Trane).
	Create partnerships and support for efficient RTUs among market actors (manufacturers, manufacturer representatives, distributors, contractors) and utilities across the US and Canada.	Recruit six manufacturers/ distributors/ manufacturer representatives to partner and submit data showing efficient RTU sales by Q2 2025.	Recruit four manufacturers/ distributors/ manufacturer representatives to partner and submit data showing efficient RTU sales by Q4 2025.	Heads up	Regular meetings with distributors and manufacturer reps are ongoing. One manufacturers rep has committed to supply 2024 RTU sales data. Meeting to discuss data agreement is in early Q3. Outreach vendor is receiving increased supply chain engagement and interest in providing data to the program regarding sales data. Multiple meetings are set up for July and August to discuss getting agreements in place by EOY. Program is expected to meet the threshold of 4 partners by Q4.
	Ensure a clear, cohesive set of value propositions for efficient RTUs throughout the supply chain.	Develop eight new marketing assets (trainings, flyers, case studies, etc.) by Q3 2025.	Develop six new marketing assets (trainings, flyers, case studies, etc.) by Q4 2025.	Heads up	New BetterBricks landing page has been implemented. Marketing team is working with the outreach team to design trainings and other collateral based on feedback from supply chain partners. Still on pace to develop eight new marketing assets, expected to be completed by Q4 which meets the program's threshold.

Commercial and Industrial

Commercial and Industrial				
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.
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025 Comment
	Bolster demand of LLLC products and increase decision-maker 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 The program featured LLLC success stories at two events in Q2. With a strong pipeline of success stories that is currently being pursued, the program is on track to meet its annual target of four new stories.
	Strengthen focus and promotion of LLLC by key manufacturer sales channels to motivate more sales professionals to champion LLLC to their customers.	Collaborate with 32 local manufacturer representatives to feature LLLC in strategic meetings or events targeting specifiers, of which 25% (8) will be representatives who have not previously featured LLLC.	Collaborate with 28 local manufacturer representatives to feature LLLC in strategic meetings or events targeting specifiers, of which 25% (7) will be representatives who have not previously featured LLLC.	On target The program continues its efforts to strengthen the regional sales channel for LLLC. In Q2, the program collaborated on five events with eight local manufacturer representatives, three of which had not previously collaborated with the program. With 18 collaborations to-date, the program is on track to meet its goal of 32. Of those 18, 10 have been with manufacturer representatives who have not previously championed LLLC publicly, surpassing the annual target of 10 and demonstrating increasing interest in LLLC.
	Influence leading lighting designers, engineers and installers to include LLLC in their ongoing business practices	Collaborate with eight lighting designers, engineers, or installers, of which at least 50% (4) have not previously partnered with the program, on media content, events, or educational activities.	Collaborate with six lighting designers, engineers, or installers, of which at least 50% (3) have not previously partnered with the program, on media content, events, or educational activities.	On target In Q2, the program collaborated at seven events with four different influential market actors (one of which had not previously partnered with the program). These events included three training events hosted by Idaho Power and one educational webinar hosted by Energy Trust of Oregon. With collaborations with six lighting designers, engineers, and installers to date, the program is on track in its targeted collaborations of eight for the year.

Commercial and Industrial

Initiative Name		Manager	Fuel Type	Initiative Goal	
	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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Increase visibility and demand for LLLC through strategic national engagements to build scale	Strengthen strategic alignment with four national or extra-regional partner organizations.	Strengthen strategic alignment with three national or extra-regional partner organizations.	On target	NEEA continued to strengthen its relationship with Design Lights Consortium through its active participation in its newly established Program Planning Committee. Through that forum, NEEA recently shared insights on market transformation training strategies for LLLC with committee members from about 15 utilities across the nation. With three to date, the program is on track to meets its goal of stronger alignment with four extra regional partner organizations.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
Motors Product Group	Extended Motors 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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Motivate participating manufacturer representative firms to preferentially stock and increase sales of smart pumps and smart circulators.	Reach market share of 23% for smart pumps and smart circulators among manufacturer representative firms participating for more than one year	Reach market share of 18% for smart pumps and smart circulators among manufacturer representative firms participating for more than one year	On target	In Q2, smart pump penetration levels reached 28% and smart circulators reached 23%, which is on target for the quarter. The program started 2025 with a soft Q1 on smart pumps (15%) but saw a sharp rebound this quarter. Smart circulators were up slightly quarter over quarter, from 22% to 23%. The business outlook from XMP participants is improved from Q1, and the program is expecting good enough results through the second half of 2025 that we may meet or exceed our target level for the year.
	Raise awareness of the value of efficient pump products, the use of the ER label and smart pumps.	Complete 30+ high-impact awareness building activities, including: smart pump education events, case studies, or "Industry Voices" videos published on BetterBricks.	Complete 15+ high-impact awareness building activities.	On target	In Q2, the program completed four more high-impact awareness building activities with relevant target audiences, bringing us to nine completed for the first half of 2025. With sixteen events and new content pieces planned for Q3 and Q4, and with additional lunch & learn opportunities in development, the program is on track to meet the target of 30+ for the year.
	Accelerate program participation by growing the number of participating manufacturer representative firms, and by expanding the program scope into additional markets.	Increase participation of firms to 11 participants.	Increase participation of firms to nine participants.	On target	With 10 active participants currently, our program team's recruitment efforts for an 11th participant firm continued in Q2. We are in active discussions with prospective firms and plan to have an 11th participant on board in Q4.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
Motors Product Group	Efficient Fans	Alexis Muench	Electric	Develop program to accelerate the adoption of efficient fans and fan system components.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Gather data and insights from market actors to inform program messaging and education activities	Data/message testing completed with 3–4 new partners and results analyzed by end of Q4 2025	Data/message testing completed with 2 new partners by end of Q4 2025	Heads up	The program team has secured commitments from two manufacturers or manufacturer reps to inform program activities via feedback and/or data, meeting the goal threshold. Outreach is actively underway with two additional potential partners; however, momentum has slowed in the engagement, so reaching beyond the two secured partners appears increasingly uncertain.
	Conduct research to understand fan purchasing and decision-making process between supply chain and market actors	Research completed and key findings disseminated internally by end of Q3 2025	Research completed and key findings disseminated internally by end of Q4 2025	On target	The program team began a study in Q1 to better understand purchasing dynamics for standalone fans—focusing on key market actors, decision-making relationships, pain points, and feedback on program language. The study is on track for completion in Q3.
	Conduct research to identify potential technical barriers to refine market transformation interventions and determine efficient fan product availability	Preliminary technical barriers identified and completed report by Q3 2025.	Preliminary technical barriers identified and completed report by Q4 2025.	On target	Initial technical barriers to market transformation and efficient fan product availability have been identified. We remain on track to deliver findings within the targeted timeframe.
	Assess data quality, create, and 3rd party review Efficient Baseline	Final baseline drafted and submitted for 3rd party review by end of Q3 2025	Final baseline drafted and submitted for 3rd party review by end of Q4 2025	On target	The program team completed the initial baseline review in Q2, and it will be submitted for 3rd party review in Q3.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
Water Heating Group	Advanced Commercial Water Heating	Melissa Mejía	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.	
	2025 Operations Plan Milestones	Target	Threshold	Status as of 8/11/2025	Comment
	Engage with manufacturers to understand their go-to-market strategies and support midstream training initiatives.	Engage three gas heat pump manufacturers and three electric heat pump manufacturers to support the development of midstream training initiatives.	Engage one gas heat pump manufacturer and one electric heat pump manufacturer to support the development of midstream training initiatives	On target	The program is on target, with continued engagement of three gas heat pump manufacturers (Robur, Vicot, and SMTI) and engagement of electric heat pump manufacturers (prioritizing Mitsubishi, Colmac, and SANCO2). The program team held recurring meetings with Robur, has committed to co-funding Vicot's North American product certification via the North American Gas Heat Pump Collaborative (expected to be completed in Q4), and is prioritizing SMTI for the identified GHP field demonstration opportunity.
	Execute and monitor field demonstrations to validate performance and savings, target market, challenges, and inform training opportunities.	Initiate one gas heat pump field demonstration and one dual fuel demonstration.	Initiate one dual fuel demonstration.	On target	The program is on target, as a dual fuel demonstration has been initiated. To date, baseline metering has been completed, and equipment installation will take place in Q4. A viable gas heat pump demonstration site has been identified and a flow meter to inform baseline data will be installed in Q3.
	Model and lab test gas heat pump technology and dual fuel configurations to further inform value proposition and savings potential.	Complete modeling effort and initiate performance validation lab tests.	Complete modeling effort.	On target	The program is meeting the goal target, with final modeling results to be provided in Q3. Modeling results will inform field demonstration configurations, where the results can be validated.
	Complete Market Characterization of Commercial Water Heating Systems in select North American Regions in partnership with Canadian and U.S. Utilities	Complete study and receive final reports by end of year.	Complete study by end of year.	Action required	The program is not on target. Research was officially kicked off in Q2. Delays in contract negotiations have pushed the estimated completion date to Q1 2026.

Infrastructure

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.
	2025 Operations Plan Milestones		Target	Threshold	Status as of 8/11/2025 Comment
	Influence commercial building industry perspectives and practices		Engage in 15 market events. Publish 10 pieces of original content.	Engage in 10 market events. Publish seven pieces of original content.	On target BetterBricks hosted booths at the IFMA Oregon and SW Washington Symposium in April, and the Northwest Facilities Expo in Portland in May, featuring a smart pumps expert and luminaire level lighting controls (LLLC) expert and demonstration board display. BetterBricks also exhibited at NEEA's Efficiency Exchange conference, sharing the new website and refreshed brand with Northwest utilities and energy efficiency organizations. BetterBricks sponsored and attended the Seattle 2030 Vision Awards in Seattle, and further sponsored the New Buildings Institute annual conference. This brings the total events so far in 2025 to 8 and keeps the program on track to meet the Target. BetterBricks published 5 new resources in Q2 for a total of 7 in 2025, including an article on the underlying components of highly efficient fans, and a luminaire level lighting controls decision-maker guide now available in Spanish.
	Increase BetterBricks brand awareness and audience reach.		Increase website traffic by 12% from 2024.	Increase website traffic by 8% from 2024.	On target The new betterbricks.com website launched in April, and the team is now preparing for a promotional campaign to drive awareness for and traffic to the website which will run in Q3-Q4. Website analytics reporting—including a year-over-year traffic comparison, will start in Q3.