

**Q3 2025: Wednesday August 20**

10:00am – 2:00pm Pacific

Virtual

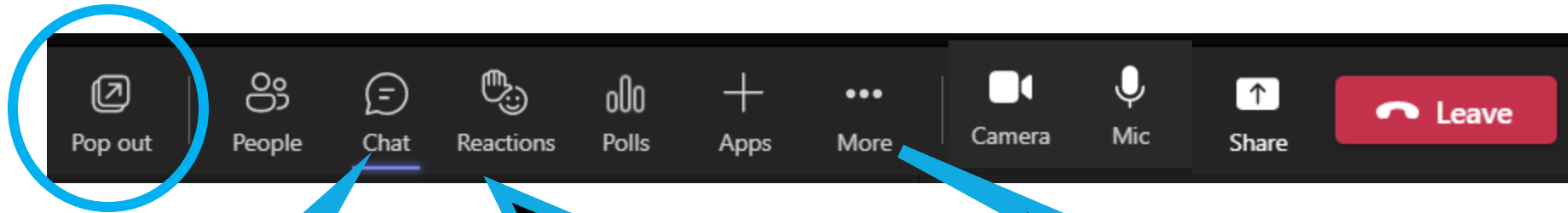
# ***Regional Portfolio Advisory Committee***





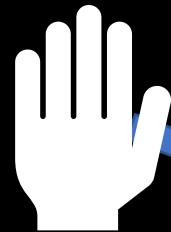


# Tools for Today: Engaging on Teams



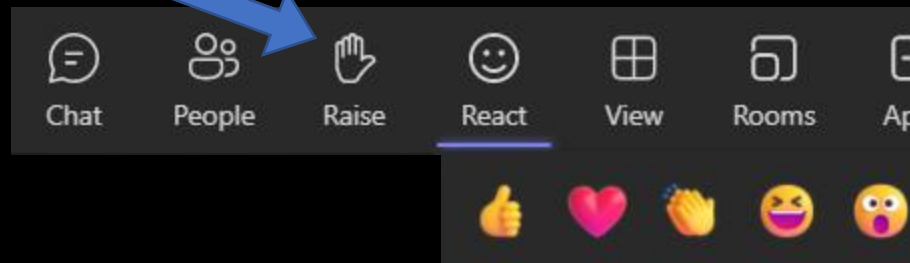
The chat is not captured automatically.

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





# Introductions

- Name
- Organization
- *And...*



*What's a quick summer highlight for you?*





# Agenda

*All Times Pacific*

10:00-10:25	Welcome, Introductions, Agenda & Packet Review
10:25-10:40	2026 Operations Planning Process + Preview
10:40-11:05	Market Transformation Highlight: Commercial HVAC
11:05-11:30	Update: NW Online Marketplace
5 min	<i>STRETCH / Transition to RPAC+</i>
11:35-12:00	RPAC+ :: 2025 HPWH Marketing Campaign Proposal
45 min	<i>LUNCH BREAK</i>
12:45-1:35	Committee Round Robin
1:35-1:55	Housekeeping and Looking Ahead
1:55-2:00	Wrap-Up & Adjourn





# ***Packet Review & Informational Updates***

## Tier 1: Agenda Items

- ✓ *2026 Operations Planning Process + Preview (pg. 3)*
- ✓ *Market Transformation Highlight: Commercial HVAC (pg. 4)*
- ✓ *NW Online Marketplace Update (pg. 5)*
- ✓ *Heat Pump Water Heater (HPWH) Marketing Campaign (pg. 6)*

## Tier 2: Informational Updates

- ✓ *NEEA Special Projects (Whole Bldg, Load Flex) Update (pg. 7)*
- ✓ *Recent Committee Updates (pg. 8)*
- ✓ *Market Progress Report (Program Updates) (pg. 10)*

## Tier 3: Additional Resources

- ✓ *Links to committee materials & functional newsletters (p. 2)*



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# *2026 Operations Planning*

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**Emily Moore**

Director, Market Strategy & Execution







# NEEA's Organizational Plans

## STRATEGIC PLAN



Foundational and lays out NEEA's overall direction, purpose, and strategy.

## BUSINESS PLAN



### How to deliver on Strategic Plan

- Market/opportunity identification (5-20 years)
- Workstreams
- Portfolio goals and focus areas
- Budget (5-year total)

## ANNUAL OPERATIONS PLAN



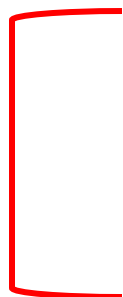
### Annual Operations Plan

- Strategic goals, risks and mitigation strategies
- Program/initiative-level objectives
- Activity-level detail
- Budget detail by department & function





## 2026 Operations Planning Underway



Timing	What to Expect
10/14/25	Draft Ops Plan Emailed to the Board, RPAC, NGAC
<b>10/16/25</b>	<b>Draft Ops Plan Overview Webinar</b>
10/30/25	Feedback due from Board + Committee Members
11/12/25	Finance & Audit Committee Meeting
12/8/25	December Board Meeting (vote on 2026 Ops Plan)

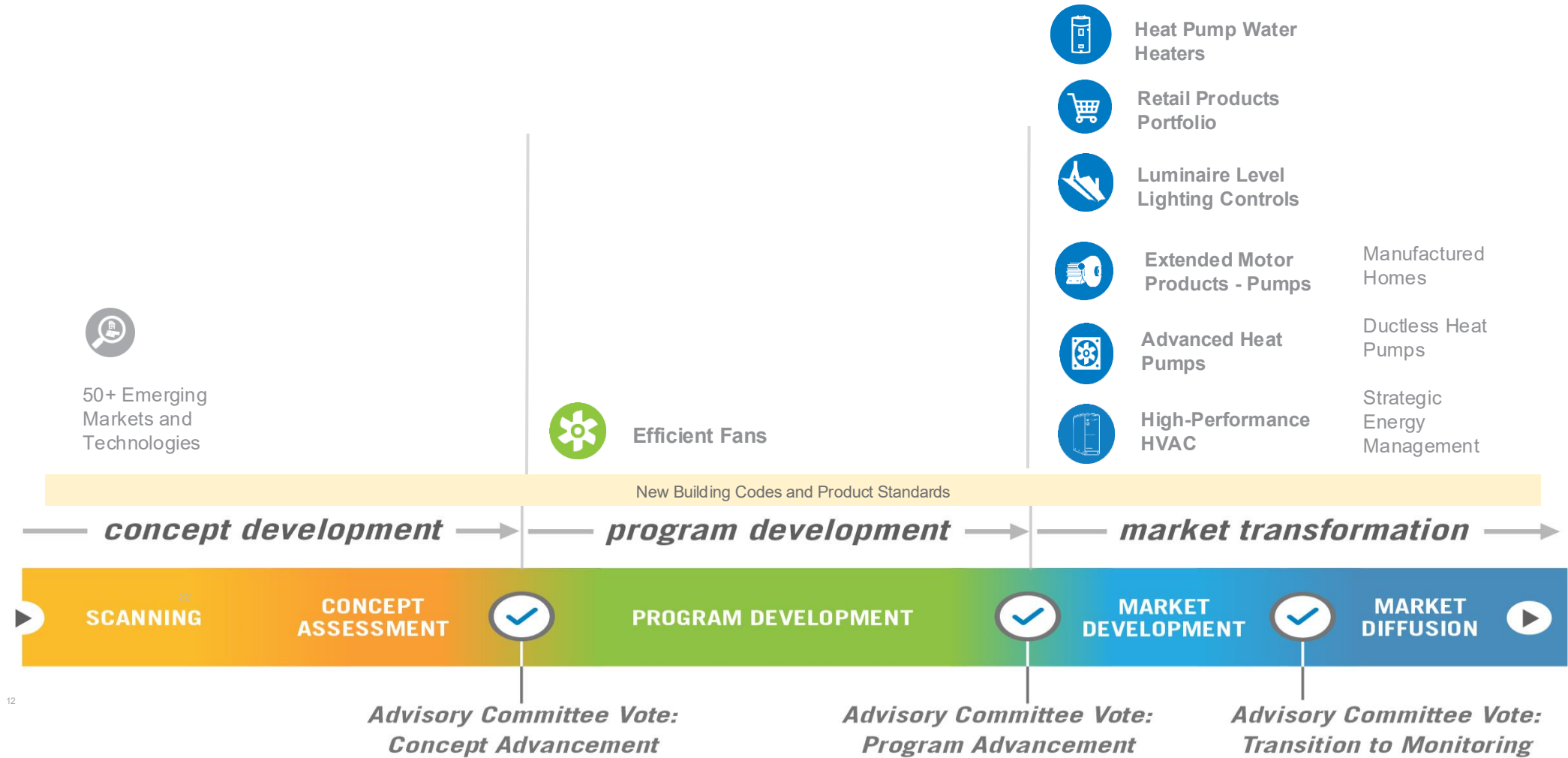
**\* Timeframe for RPAC review and feedback**





# Electric Market Transformation Portfolio

Status as  
of June  
2025



Infrastructure investments and specific code and standards work not included in this depiction of the portfolio





## ***Electric 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





# ***Electric Portfolio for 2026***

## **Focus Areas:**

- Regional adoption of HPWH
- TV opportunity via ENERGY STAR Retail Products Platform
- Increased XMP Pumps interventions to accelerate savings
- XMP Pumps expansion to other pump types

## **Portfolio Advancements:**

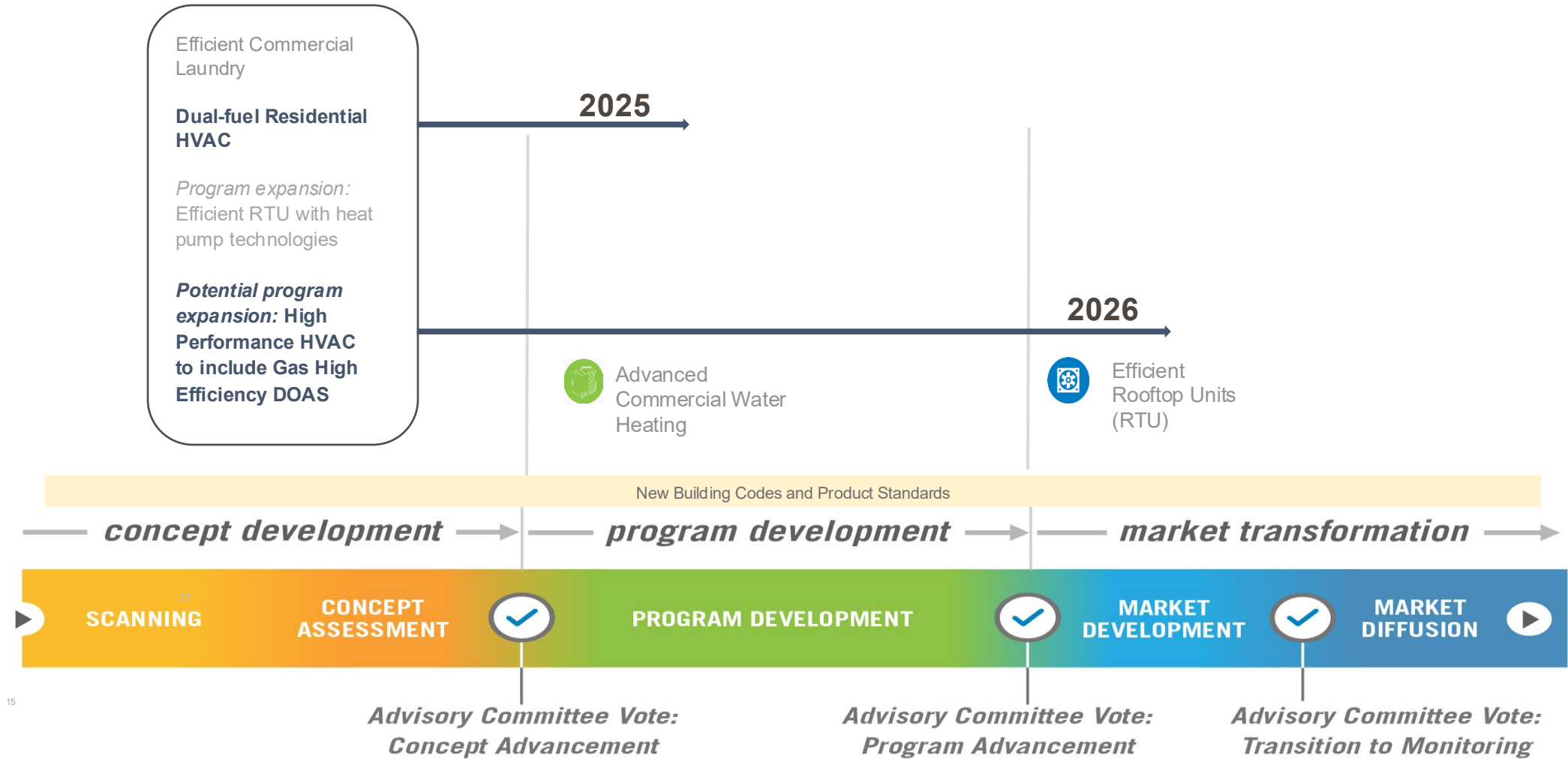
- Efficient Fans advancement to Market Development
- New Program Concept review in Q2 2026





# Natural Gas Market Transformation Portfolio

Status as  
of June  
2025



Infrastructure investments and specific code and standards work not included in this depiction of the portfolio





*Questions?*



# Thank You!



## Emily Moore

Director, Market Strategy & Execution

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



NW Natural®



Seattle City Light





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# ***MT Highlight: Commercial HVAC – High-Performance HVAC***

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**Dave Hammond**

Sr Program Manager, High-Performance HVAC

August 20, 2025







# Agenda

- High-Performance HVAC Market Transformation Theory Overview
- Quick Glance: Market Progress Evaluation Report (MPER) #1
- Market Transformation Highlight: Manufacturer Representative Engagement
- Program Expansion Exploration





# *High-Performance HVAC*

## *Market Transformation*

### *Theory Overview*





# High-Performance HVAC\* Overview

**\*Utilizes the Very High Efficiency DOAS system design (VHE DOAS):**

1

Fully decoupled ventilation from heating and cooling

2

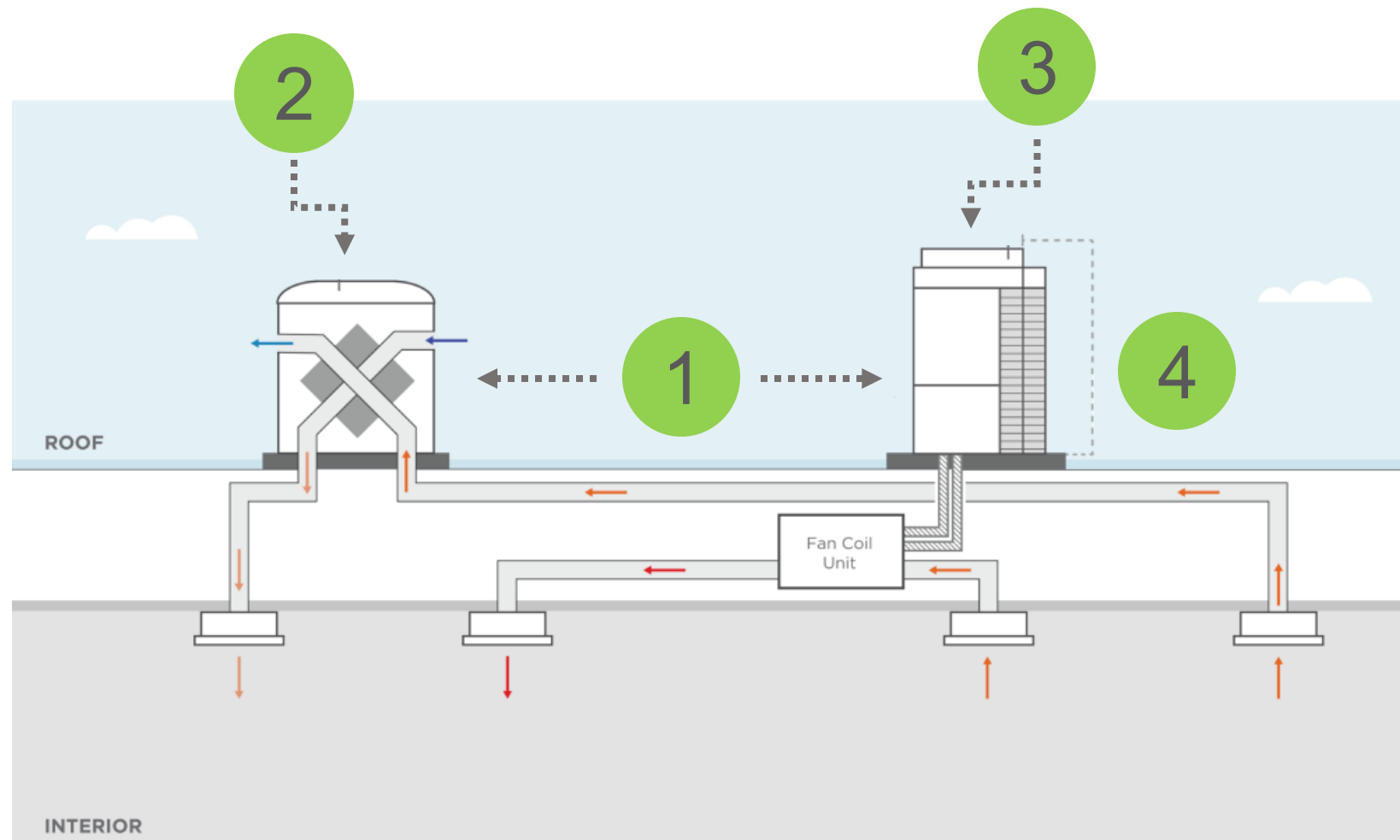
High efficiency heat/energy recovery ventilator with  $\geq 82\%$  sensible effectiveness

3

High performance electric heat pump system

4

Right-sized heating and cooling system







## *High-Performance HVAC – Key Interventions*

1

Educate and motivate manufacturer representatives/distributors to promote VHE DOAS system design

2

Raise end-user and supply chain awareness of the system approach and associated benefits

3

Address product availability and high first cost of compliant ERV/HRVs\*

4

Influence the advancement of local, state and federal codes to require elements of VHE DOAS throughout the Northwest

\*ERV/HRV = Energy/Heat Recovery Ventilator





# High-Performance HVAC Initiative Lifecycle







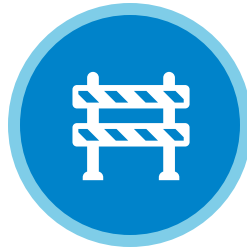
# ***Quick Glance:***

## *Market Progress Evaluation Report #1*



# ***Market Progress Evaluation Report (MPER) #1***

## *Overarching Research Objectives*



Gather feedback about NEEA's VHE DOAS outreach materials and about designers' perspectives on VHE DOAS.



Measure progress related to high priority market barriers and provide a baseline for longitudinal tracking of market progress.



Qualitatively assess program influence on observed market transformation.



# *Market Progress Evaluation Report (MPER) #1 – Key Findings & Observations*

1

VHE DOAS is gaining traction, but adoption is difficult to measure

2

In the region, designers who work in Washington are more likely to include VHE DOAS in their HVAC designs

3

NEEA's trainings are a valuable resource for spreading awareness and encouraging deeper engagement with VHE DOAS



***Market Transformation  
Highlight:  
Manufacturer Representative  
Engagement***





# *Market Transformation Progress via Manufacturer Reps*

## Program Barriers

Lack of awareness of VHE DOAS & associated value

High first cost of HRV/ERVs

Limited availability of very high efficiency HRV/ERVs



## Program Interventions

Encourage manufacturer promotions, marketing activities & trainings

Use NEEA incentives to defray incremental cost of HRV/ERV and incent sale and design of system

Encourage more qualifying HRV/ERVs, including expanded price points





# *ERV/HRV Manufacturer Representative Progress*



## 1. Johnson Barrow

- Compliant brands: 1
- Compliant models: 9

## 2. Dorse

- Compliant brands: 1
- Compliant models: 15

## 3. Mechanical Sales Inc.

- Compliant brands: 1
- Compliant models: 87

## 4. AirReps

- Compliant brands: 2
- Compliant models: 29





# ***ERV/HRV Manufacturer Representative Progress***

## **Key activities**



Collaboration on designer-focused trainings and marketing activities



Updated incentive strategy in response to rep feedback



Expansion into new territory



# ***Program Expansion Exploration***





## *Program Expansion Exploration*

- Current program design focused on buildings primarily heated via high efficiency electric systems
- Program exploring potential to expand to include gas heating systems
- Benefits include:
  - Simplifies message to targeted market audience
  - Compliments electric market trends suggesting shift from VRF technology towards air-to-water hydronic heat pumps





# Program Expansion Exploration

## Timeline

- 2025: Program expansion research
  - Specification development
  - Market impact analysis
- 2026: Program expansion proposal\*
  - Presentation to natural gas advisory committee
  - Request to advance to market development



\*Pending results of 2025 expansion research



# Thank You!



**Dave Hammond**

Sr. Program Manager, High-Performance HVAC

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





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# ***Update: NW Online Marketplace***

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**Steve Seminario**

Market Transformation Manager, Consumer Products







# *Regional Online Marketplace*



**Enervee**



Northwest  
Marketplace

- Northwest Marketplace technology scanning project
  - [nw.enervee.com](https://nw.enervee.com)
  - Running December 4, 2024, through November 4, 2025
  - -- Share key results and learnings
- Multi-year Pilot proposal under review
  - Expand functionality
  - More directly involve several alliance members
  - -- Describe Pilot proposal and goals





# *Northwest Marketplace Scanning Project Results*





## *Market Transformation Opportunity*

Make it easy for Northwest residents to find, evaluate, compare and source energy efficient products where they do their research – on the internet – and by doing that, raise overall energy efficiency of Northwest consumer product sales

**Key requirement:** Do it in a way that is complementary and not disruptive to alliance funder efforts, incentives and online stores.

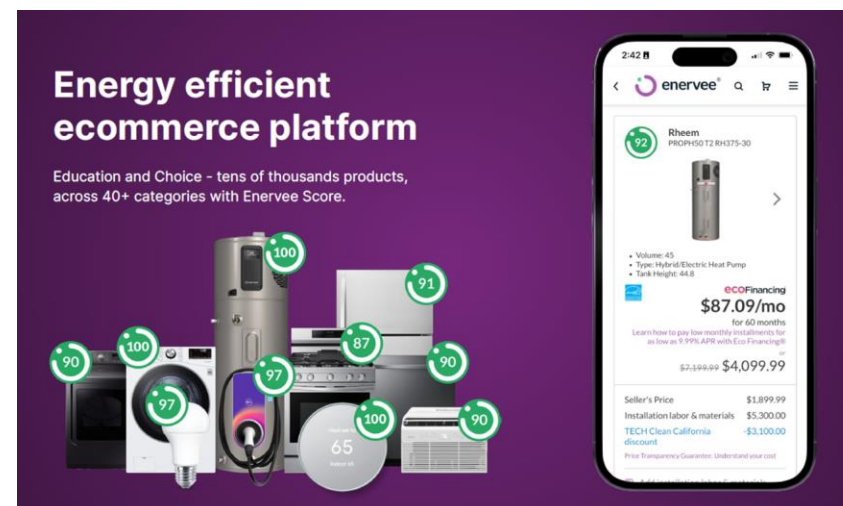




# Enervee Platform

*“The best way to shop for energy-saving products”*

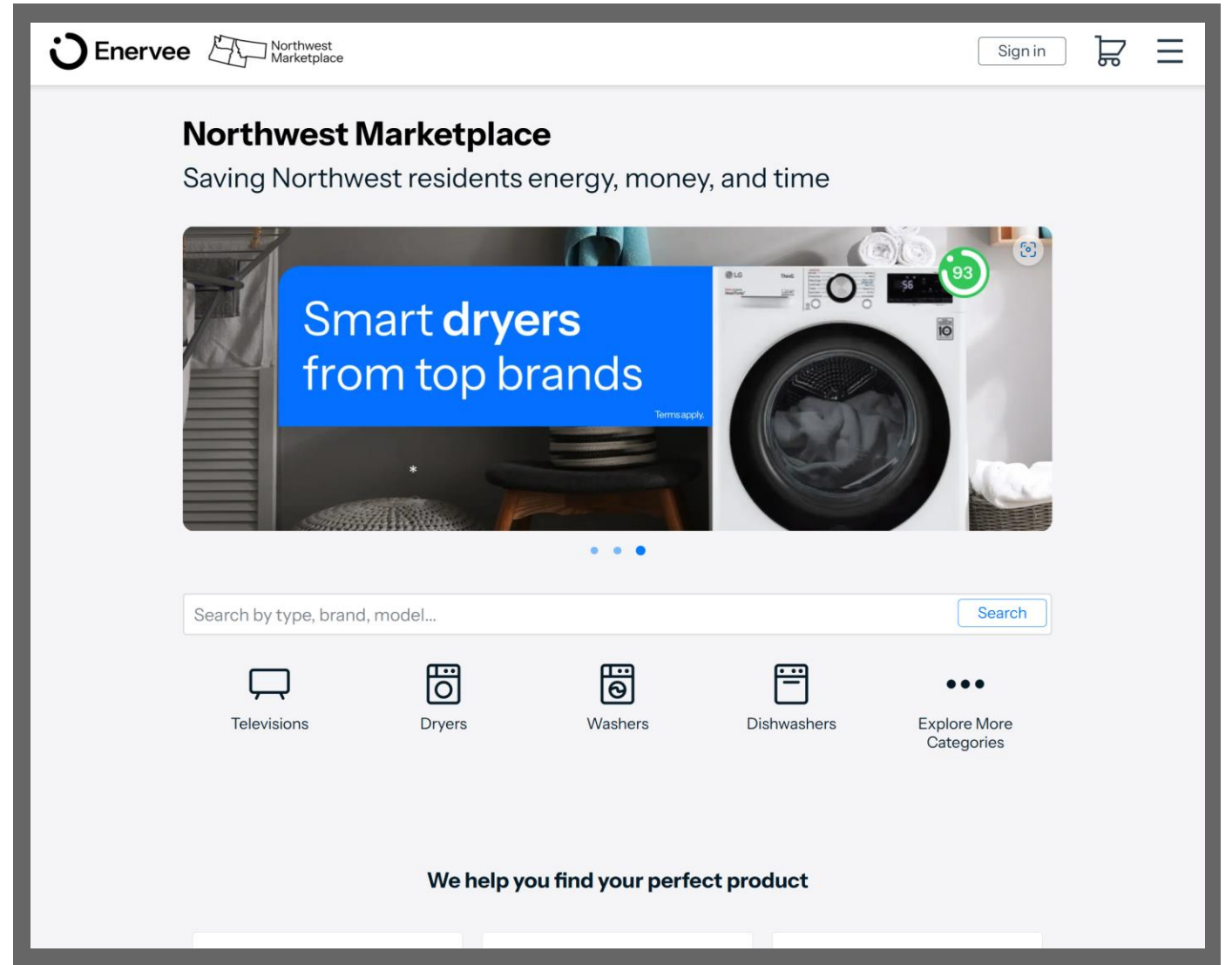
- Unique and proven platform to simplify energy efficient product shopping
- 40+ product categories
- Unique Enervee Score™
- Directs to trusted retailers
- Proven efficiency lift in purchases
- Proven customer satisfaction





# [nw.enervee.com](http://nw.enervee.com)

- ~ 30 product categories
- Search Engine Marketing – Energy Trust and Clark PUD territories
- Accessible across NW region
- Web analytics





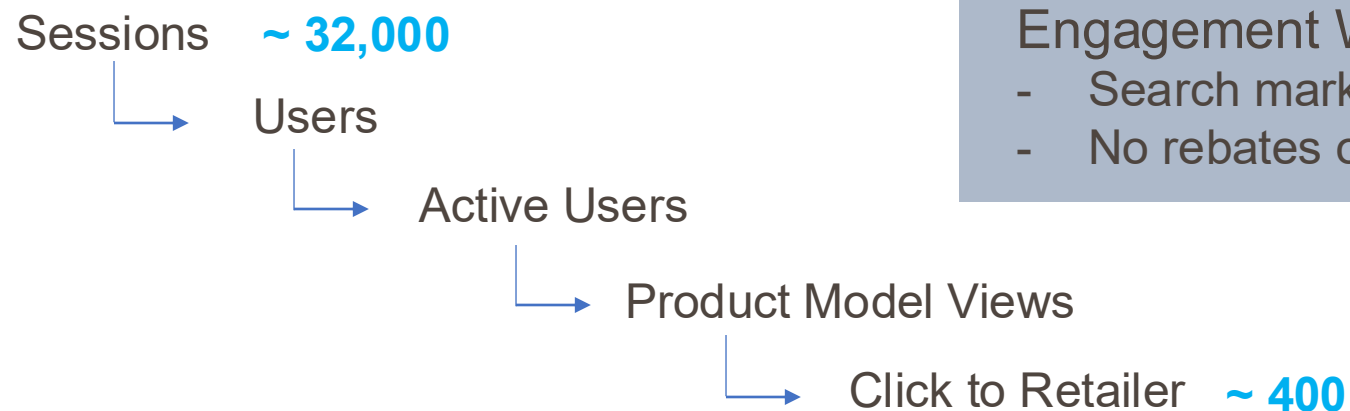


# *Primary Scanning Project Objectives*

1. Measure **site traffic** from Search Engine Marketing
2. Assess the **site effectiveness** using data and analytics
3. Gather **funder feedback** and gauge interest in leveraging the platform as a positive customer touch point



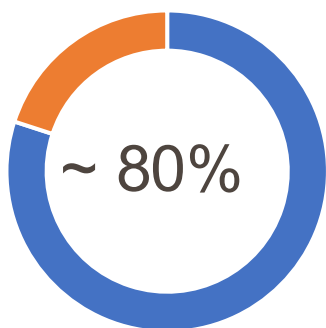
# Site Usage Summary



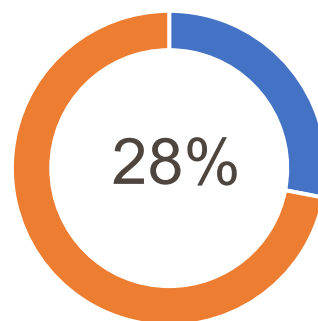
## Engagement Waterfall

- Search marketing on 2 product types
- No rebates or financing

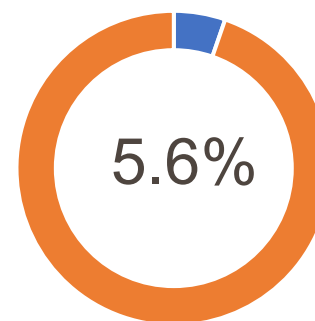
Mobile Users



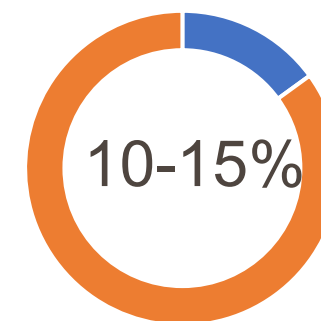
Active Users  
as % of Users



Click to Retailer  
as % of Active Users



Other Product Category  
Page Views







### Non-Refrigerator or TV Product Views

Product Category	% of Non-Fridge/TV
Washer	25%
Dishwasher	16%
Dryer	15%
Range	12%
Freezer	7%
Oven	4%
Electric Water Heater	3%
Thermostat	3%
Air Purifier	3%
Cooktop	2%
Air Conditioner	2%
Lawn Mower	1%
Sound Bar	1%
Leaf Blower	1%
Pool Pump	1%
Range Hood	1%
Shower Head	1%
Connected Home	1%
EV Charger	1%
Monitor	1%
Evaporative Cooler	-
Portable Power Station	-
Power Strip	-
Dehumidifier	-
Gas Water Heater	-
Light Bulb	-
Pool Heater	-
Projector	-
Trimmer	-
<hr/>	
	705

# Broad Product and Retailer Interaction

Product Categories  
Searched  
**31**

### Buy Clicks to Retailer

Retailer	%
Amazon	43%
Lowe's	17%
The Home Depot	13%
BrandsMart USA	9%
Best Buy	8%
AJ Madison	5%
Build with Ferguson	1%
Abt	1%
Target	1%
Whirlpool	1%
Sylvane	-
lightbulbs.com	-
<hr/>	
	403

Retailers Accessed  
**12**





# *Primary Conclusions*

## Solid platform

1. Very stable; functionality worked continuously
2. Users engaged and bought efficient products (avg Enervee Score = 91)
3. Performance matched benchmarks
4. Encouraging breadth of product categories and retailers accessed





# *Primary Conclusions*

## Potential to deliver more value

1. Scaling up would require more than just Search Marketing
2. Additional functionality would make it more useful to certain funders
3. Offers (rebates, financing) can significantly increase site usage
4. Could provide a useful cross-region platform



A faint, light blue geometric logo is centered in the background. It consists of two interlocking diamond shapes, each formed by four chevron-like segments pointing towards the center.

# *Next Phase Pilot Concept*



## *Path to a Pilot Proposal*



Scanning project and extra-regional results show the market transformation opportunity is achievable



Alliance funder interaction pointed to functionality that could be potentially valuable to them and their customers



Currently refining scope, cost and alliance member participation





# *Pilot Functionality*

All participants

Branded  
home pages

Link to funder  
rebate offers

- 3 years
- Begin Q1 2026
- Participating utilities choose level of functionality they want

Options

Flag  
Participant  
rebates

Transact  
rebate  
purchases

Post-purchase  
rebate  
processing

Exploring  
separately

Demand  
Response  
Enrollments

Eco Financing





## *Objectives of Next Phase Pilot*

1. Implement utility-specific functionality
2. Analyze traffic and efficient product sales data
3. Evaluate utility and user satisfaction
4. Explore adding Eco Financing offer





## *Pilot Status*

- Solidifying basic terms with Enervee (Now)
- NEEA reviewing funding requirements (Now)
- Outline proposals to potentially participating alliance members (September)
- Close on a plan and contract (Q4)





# *Thank You!*

- Questions or comments?
- Happy to support any separate demonstrations or discussion





# Thank You!



## Steve Seminario

Market Transformation Manager, Consumer Products

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



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# Stretch Break





# ***“RPAC+” NEEA Marketing Elections***

## **Process Overview**

Alisyn Maggiora, Sr. Stakeholder Relations Manager







## ***RPAC+ Elections 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

➤ [Click for “RPAC+” details in Charter](#)





# ***RPAC+ Elections Process – Roll Call @ End***

Electric HPWH Consumer Awareness Campaign			
	Participate ✓	Self-Deliver ✓	Exempt ✓
Avista			
BPA			
Chelan PUD			
Clark PUD			
Energy Trust			
Idaho Power			
NorthWestern Energy			
Pacific Power			
Portland General Electric			
Puget Sound Energy			
Seattle City Light			
Snohomish PUD			
Tacoma Power			





# ***Proposed 2025 HPWH Consumer Campaign***

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**Britt Cutsforth Dawkins**

Senior Manager, Marketing Strategy

August 20, 2025







# 2025 Campaign Overview

- Brand: Hot Water Solutions
- Timing: October through December 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](https://HotWaterSolutionsNW.org)
  - From landing page: Drive to utility websites, local installers, retailers, manufacturers







# Campaign strategies

- Continue increasing Northwest awareness
  - Build on the existing 57% regional consumer awareness and act on MPER 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 with some level of existing awareness of HPWHs gain an increased understanding of the HPWH value proposition, to drive interest in—and ultimately, demand for—HPWHs
- Ensure alignment
  - Connect with funders as needed and collaborate with mid- and upstream market actors during the campaign

\* [Northwest Heat Pump Water Heater Market Progress Evaluation Report #6](#), pages 15, 23, 80





# *Campaign optimizations*

- Testing secondary messaging
  - e.g., DIY installation and reducing energy waste
- Expanding reach
  - New channels: Digital audio platforms (e.g., Spotify, Pandora, or iHeart Radio) music and podcasts, NextDoor
  - 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



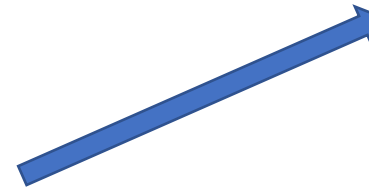
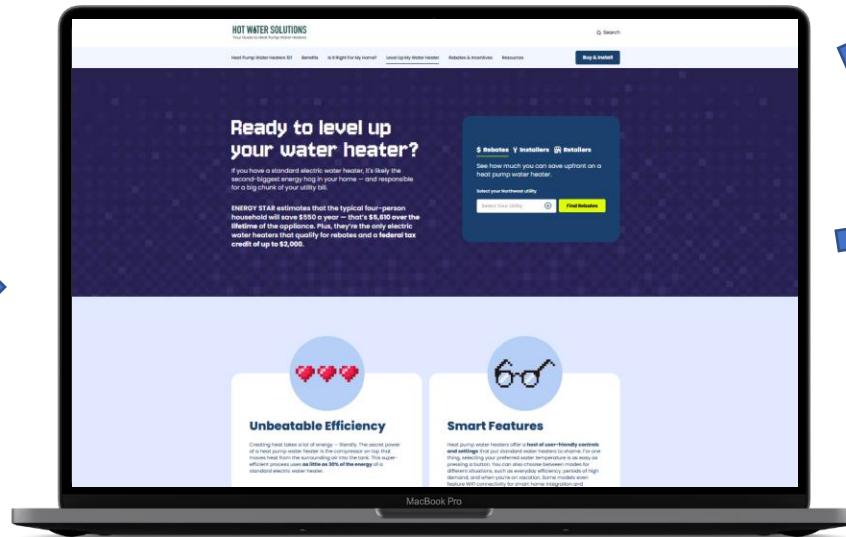


# User Experience

## MEDIA CHANNELS



## CAMPAIGN LANDING PAGE



## EDUCATION AND TRANSACTION

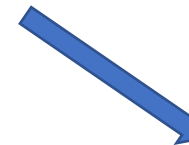
### Local Utility



### 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



### 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 the Q3 RPAC/RPAC+ meeting (note: no revisions to proposed campaign materials)

### August 20

#### Q3 RPAC/RPAC+ meeting

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

### Late August–September

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

## Q3 2025

## Q4 2025

### October

- **Launch 2025 consumer campaign**

### December

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



# ***RPAC+ Elections: Reminder***

- **PARTICIPATE:** Funder supports NEEA conducting the planned marketing activity in its service territory
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# *Q&A / Discussion*





## ***RPAC+ Elections – 2025 HPWH Consumer Campaign***

Electric HPWH Consumer Awareness Campaign			
	Participate ✓	Self-Deliver ✓	Exempt ✓
<b>Avista</b>			
<b>BPA</b>			
<b>Chelan PUD</b>			
<b>Clark PUD</b>			
<b>Energy Trust</b>			
<b>Idaho Power</b>			
<b>NorthWestern Energy</b>			
<b>Pacific Power</b>			
<b>Portland General Electric</b>			
<b>Puget Sound Energy</b>			
<b>Seattle City Light</b>			
<b>Snohomish PUD</b>			
<b>Tacoma Power</b>			



# Thank You!



## Britt Cutsforth Dawkins

Senior Manager, Marketing Strategy

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



NW Natural





# *Lunch!*

*Please return by  
12:45pm Pacific*





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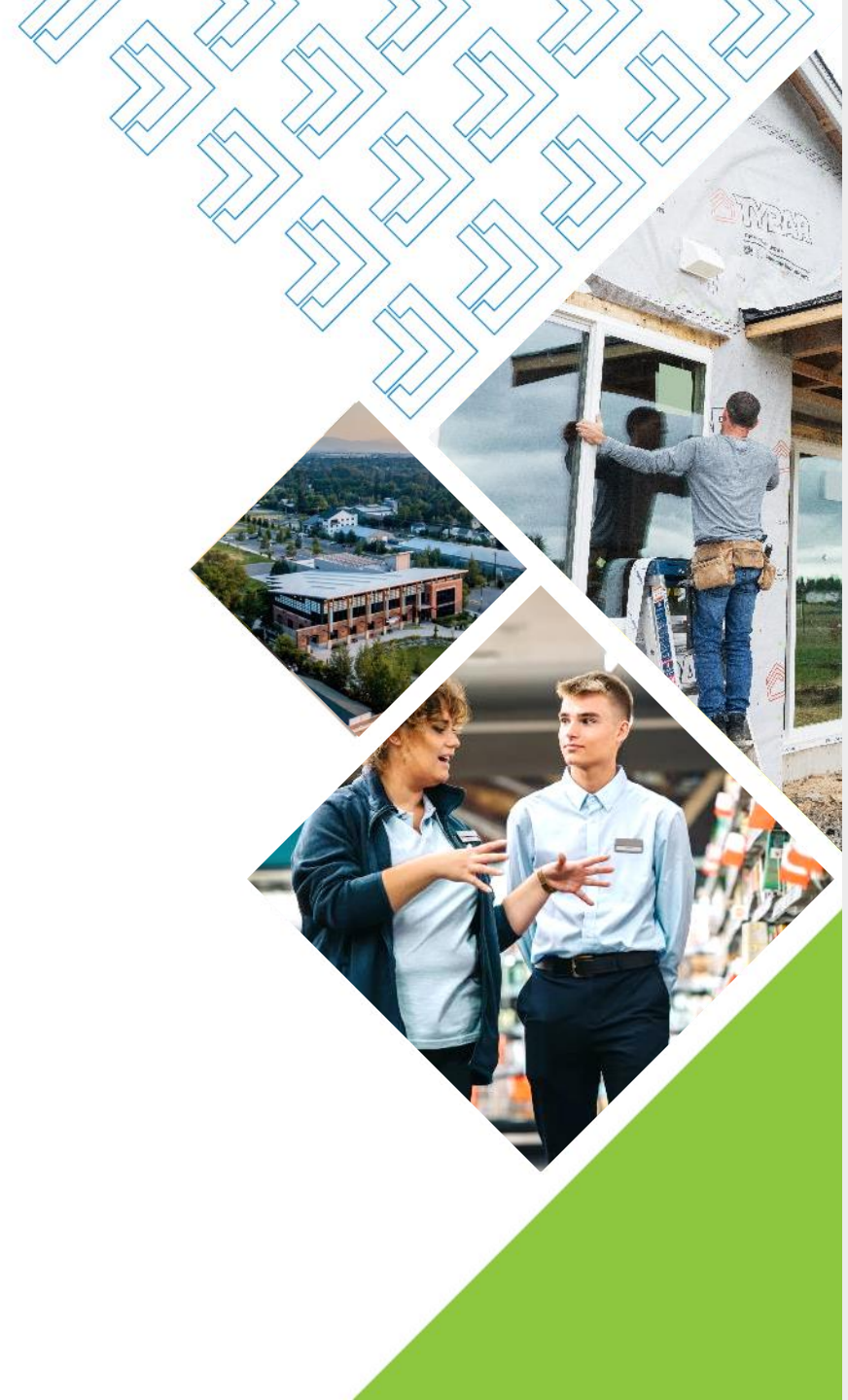


# *Round Robin Updates*

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## **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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# Housekeeping

## ➤ *Updates*

- ✓ One Big Beautiful Bill
- ✓ ENERGY STAR
- ✓ Federal Standards

## ➤ *Announcements & Reminders*

- ✓ Leadership Awards Dec 8
- ✓ EFX'26 Topic Solicitation
- ✓ NEEA Cycle 6 (2020-24) Report
- ✓ Upcoming RPAC Meetings







# ***One Big Beautiful Bill***





***ENERGY STAR***



# *Standards Update*

Check out the latest Codes, Standards & New Construction newsletter (released Aug 12) here: <https://neea.org/resource/q2-2025-codes-standards-and-new-construction-newsletter/>





Help us honor the innovators and collaborators driving energy efficiency across the Northwest and beyond. NEEA will recognize individuals and teams for their exemplary dedication and performance in the industry during lunch on the first day of the NEEA Annual Board Meeting on December 8.

Nominations can be made in the following categories:

- **Rising Star**
- **Innovative Collaboration**
- **Lifetime Achievement**

## Nominations

Aug 04  
Through  
Sept 19

## Event

Dec 08



To nominate go to:  
[nea.org/leadershipawards](https://nea.org/leadershipawards)



## *Efficiency Exchange 2026*



Submit Ideas for Session Topics

**September 15 – October 24**

**[neea.org/EFX](https://neea.org/EFX)**

**Save the Date for EFX26**

**May 5-6**

**Boise, Idaho**

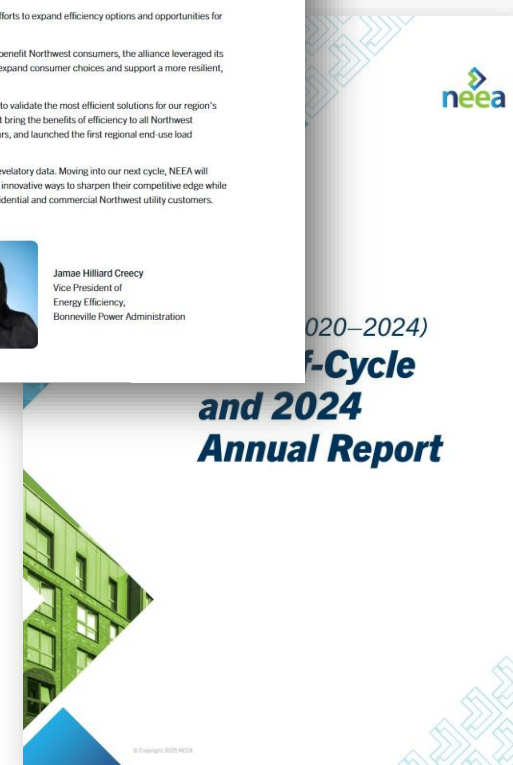




# NEEA Cycle 6 + 2024 Annual Report now available

NEEA's Cycle 6 (2020 – 2024) + 2024 Annual Report spotlights the alliance's collaborative successes across five years, demonstrating the many ways that Market Transformation continues to foster a more affordable, resilient and secure energy future for the Northwest.

View the full report at [neea.org/annualreport](https://neea.org/annualreport)







## ***Could others in your organization benefit from a NEEA / MT 101?***

- Offering 2x/year 90 min webinar for alliance members
- Target audience:
  - Committee members wanting a refresher
  - EE/conservation team members not on NEEA committees, but interact with NEEA's work or would benefit from a basic overview
- **Next session: Wed Oct 1, 9-1030**
- Contact: Alisyn Maggiora



# Upcoming Meetings

Wednesday, August 27

- **Cost Effectiveness & Evaluation**

Wednesday, September 10

- **Natural Gas Webinar**

Wednesday, September 24

- **Regional Emerging Technology**

*Note: No Q3 Coordinating Committee meetings*

- **RPAC**

- Q4 Monday Nov 3

- **Are you interested & available for in-person?**

- 1) interested & available
- 2) interested & available, could potentially host
- 3) prefer virtual for Q4

- 2026 proposed dates

- Feedback due by Oct 1 please - **any major flags / conflicts?**

Quarter	Day(s)	Date(s)	Format
<b>Q1</b>	Tuesday	Feb 10	Hybrid @ NEEA
<b>Q2</b>	Tuesday	May 19	Virtual
<b>Q3</b>	Tuesday	Sept 1	Virtual
<b>Q4</b>	Tuesday	Nov 3	Hybrid @ NEEA or Seattle?



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





# Agenda

*All Times Pacific*

10:00-10:25	Welcome, Introductions, Agenda & Packet Review
10:25-10:40	2026 Operations Planning Process + Preview
10:40-11:05	Market Transformation Highlight: Commercial HVAC
11:05-11:30	Update: NW Online Marketplace
5 min	<i>STRETCH / Transition to RPAC+</i>
11:35-12:00	RPAC+ :: 2025 HPWH Marketing Campaign Proposal
45 min	<i>LUNCH BREAK</i>
12:45-1:35	Committee Round Robin
1:35-1:55	Housekeeping and Looking Ahead
1:55-2:00	Wrap-Up & Adjourn





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 horizontally and slightly above the vertical center. The bow has two loops on the top and two loops on the bottom. The string extends horizontally across the width of the paper and vertically down the center.

***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...

➤ Q4 2025: Monday Nov 3 | Possibly Hybrid



NW Natural®

