

Q3 2025: Wednesday, September 10

NGAC Interim Webinar

1:00pm – 2:15pm (Pacific)

Virtual

Natural Gas Advisory Committee





Agenda

All times Pacific

1:00-1:05	Welcome, Quick Introductions, Agenda Review
1:05-1:10	Vote Process Refresher
1:10-1:20	2026 Operations Planning Process + Preview <ul style="list-style-type: none">• Operations Planning timeline• Preview of portfolio focus areas for 2026
1:20-2:05	Dual-Fuel Residential HVAC <ul style="list-style-type: none">• Reminder: What is 'Concept Advancement' Vote• Concept Overview + 2026 Focus Areas• NGAC Feedback• *VOTE*
2:05-2:15	Housekeeping, public comment, wrap up and adjourn



Vote Refresher

Alisyn Maggiora
Sr. Stakeholder Relations Manager





Preview:
NGAC Vote: ‘Concept Advancement’ Milestone

Dual-Fuel Residential HVAC

Name	Organization	Yes	No	Abstain	Not Present
NGAC Voting Members					
Carlos Limon	Avista				
Jodie Albert	Cascade Natural Gas				
Jackie Goss	Energy Trust				
Laney Ralph	NW Natural				
Michelle Wildie	PSE				





Yea buts... How abouts... What ifs...

- Work in advance to draw out show-stoppers
- [Charter](#) provides guidance on next steps and ensures transparency



Agenda

All times Pacific

1:00-1:05	Welcome, Quick Introductions, Agenda Review
1:05-1:10	Vote Process Refresher
1:10-1:20	2026 Operations Planning Process + Preview <ul style="list-style-type: none">• Operations Planning timeline• Preview of portfolio focus areas for 2026
1:20-2:05	Dual-Fuel Residential HVAC <ul style="list-style-type: none">• Reminder: What is 'Concept Advancement' Vote• Concept Overview + 2026 Focus Areas• NGAC Feedback• *VOTE*
2:05-2:15	Housekeeping, public comment, wrap up and adjourn





2026 Operations Planning

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

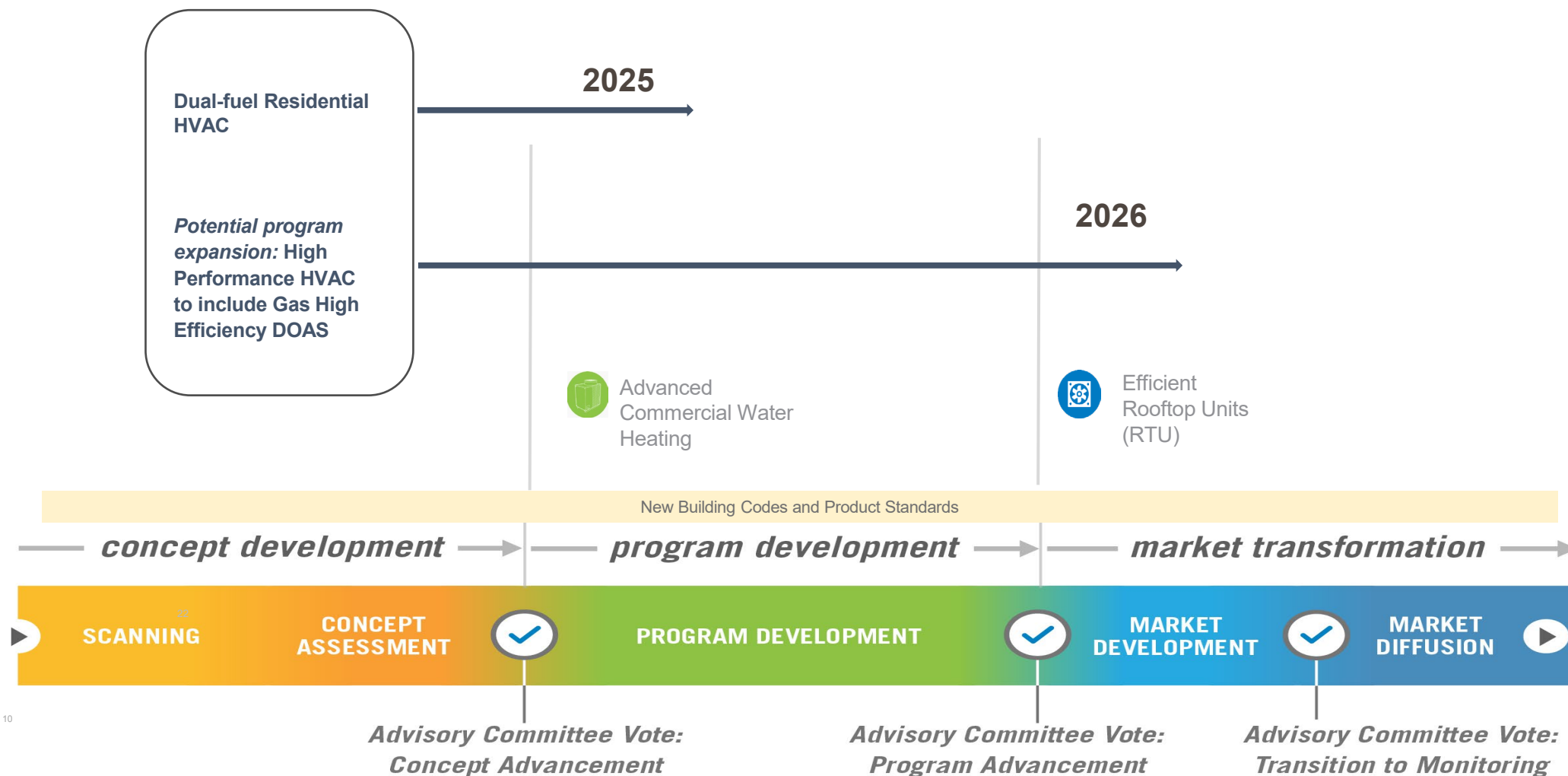


Timing	What to Expect
10/14/25	Draft Ops Plan Emailed to the Board, RPAC, NGAC
10/16/25	Draft Ops Plan Overview Webinar
10/30/25	Feedback due from Board + Committee Members
11/12/25	Finance & Audit Committee Meeting
12/8/25	December Board Meeting (vote on 2026 Ops Plan)

*** Timeframe for NGAC review and feedback**



Natural Gas Market Transformation Portfolio





Questions?



Agenda

All times Pacific

1:00-1:05	Welcome, Quick Introductions, Agenda Review
1:05-1:10	Vote Process Refresher
1:10-1:20	2026 Operations Planning Process + Preview <ul style="list-style-type: none">• Operations Planning timeline• Preview of portfolio focus areas for 2026
1:20-2:05	Dual-Fuel Residential HVAC <ul style="list-style-type: none">• Reminder: What is 'Concept Advancement' Vote• Concept Overview + 2026 Focus Areas• NGAC Feedback• *VOTE*
2:05-2:15	Housekeeping, public comment, wrap up and adjourn



Concept Advancement Milestone

Initiative Lifecycle



- First voting milestone
- Preliminary confidence that a concept has “legs” and warrants a deeper look - but there’s a lot we don’t know and that’s ok
- The Program Development phase that comes next is about learning



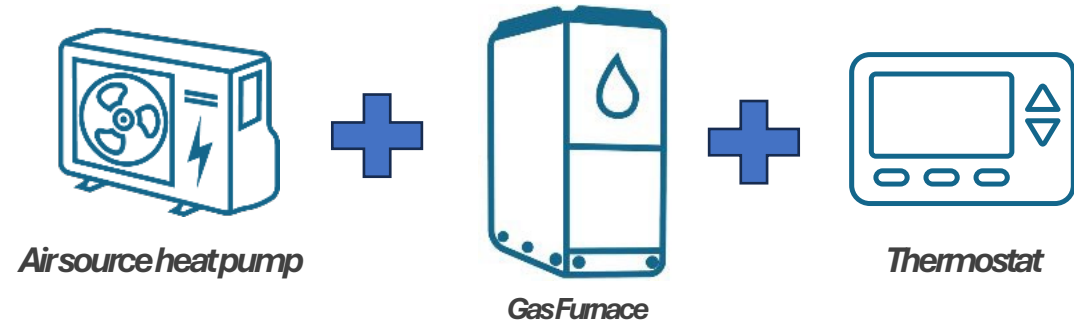
Dual-Fuel Residential HVAC Concept Advancement Milestone

Deborah Sunada

Sr. Program Manager, NEEA



Dual-Fuel Residential HVAC Overview



Target Market

- Gas consumers choosing to add or update a dual-fuel system for cooling in a home

MT Vision

- Dual-fuel systems with grid-enabled controls will be the standard dual-fuel solution
- Energy savings, cost savings, and year-round comfort



Dual-Fuel Concept Status Overview

“Knowns”

Annual electric load growth is increasing ~4% and requires innovative solutions. Gas could support electric peak management and flexibility

Adoption of proper design/selection, and installation set points will rely heavily on contractor/customer behavior

Utilities will have a significant role to play to help the region identify appropriate dual-fuel policies

Electricity and gas rate spread significantly impacts cost-effectiveness of dual-fuel systems

“Unknowns”

Effectiveness of “static” set points on energy savings in Oregon/Washington (milder climate)

- Funder framework to report dual-fuel savings
- Value of natural gas during electric peak events

Future energy system resource needs



NGAC Feedback Summary

Reliance on contractor and customer behaviors as potential concern

- Standardizing terminology for contractors and manufacturers
- Educating customers on comfort expectations
- Demonstrate customer value for well-designed dual-fuel systems

Potential of reduced savings from narrower setpoints and system design across climates and utility rates

- Right-sizing of dual-fuel systems, switchover temperatures, system responsiveness during transition periods
- Utility rate structures are critical parameters and need to function to realize full savings potential

Overall negative impact on electric grid due to fixed setpoints

- Program's current baseline is of customers who have already selected a dual-fuel system
- Expectation of baseload addition to the grid and the program will aim to provide a lever to reduce impact to peak demand



Program Development Next Steps

- Validate product technical assumptions, product performance and energy savings
- Understand market conditions in Residential HVAC and implications/motivators for adoption across the supply chain and consumers
- Identify and refine program barriers, leverage points, and interventions
- Refine target market, baseline conditions and near-term gas savings



Discussion





NGAC Vote: ‘Concept Advancement’ Milestone

Dual-Fuel Residential HVAC

Name	Organization	Yes	No	Abstain	Not Present
NGAC Voting Members					
Carlos Limon	Avista				
Jodie Albert	Cascade Natural Gas				
Jackie Goss	Energy Trust				
Laney Ralph	NW Natural				
Michelle Wildie	PSE				



Thank You!



Deborah Sunada

Sr. Program Manager, NEEA

dsunada@neea.org





Agenda

All times Pacific

1:00-1:05	Welcome, Quick Introductions, Agenda Review
1:05-1:10	Vote Process Refresher
1:10-1:20	2026 Operations Planning Process + Preview <ul style="list-style-type: none">• Operations Planning timeline• Preview of portfolio focus areas for 2026
1:20-2:05	Dual-Fuel Residential HVAC <ul style="list-style-type: none">• Reminder: What is 'Concept Advancement' Vote• Concept Overview + 2026 Focus Areas• NGAC Feedback• *VOTE*
2:05-2:15	Housekeeping, public comment, wrap up and adjourn



Upcoming Meetings

Wednesday, September 24

- **Regional Emerging Technology**

Thursday October 16

- **2026 Draft Ops Plan Webinar**

Tuesday, October 28

- **Natural Gas**
- **Dual-Fuel Workgroup**

Wednesday, October 29

- **Cost Effectiveness & Evaluation**

- NGAC

- Q4 Tuesday Oct 28 ***POLL***

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

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

- Next Dual-Fuel Workgroup Meeting

- Plan to incorporate at end of 10/28 NGAC meeting

Draft 2026 NGAC Dates

Feedback
requested by Oct 1

QUARTER	DAY	DATE	TIME	LOCATION
<i>Interim Webinar</i>	Wednesday	Jan 28	1-2pm	Virtual
Q1	Tuesday	Mar 3	9am-4pm	NEEA/Hybrid
<i>Interim Webinar</i>	Thursday	Apr 16	1-2pm	Virtual
Q2	Tuesday	June 2	9am-4pm	Virtual
Q3	—	No Q3 Mtg	—	—
<i>Interim Webinar</i>	Wednesday	Sept 9	1-2pm	Virtual
Q4	Thursday	Oct 22	9am-4pm	NEEA/Hybrid
<i>Interim Webinar</i>	Wednesday	Dec 9	1-2pm	Virtual



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



Submit Ideas for Session Topics

September 15 – October 24

neea.org/EFX

Save the Date for EFX26

May 5-6

Boise, Idaho



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



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



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



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 to the right of the vertical center. The bow has two loops on the right side and two tails extending to the left and right. 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 NGAC! Until we meet again...

➤ Q4 2025: Tuesday Oct 28 | Hybrid?



NW Natural®



Seattle City Light

