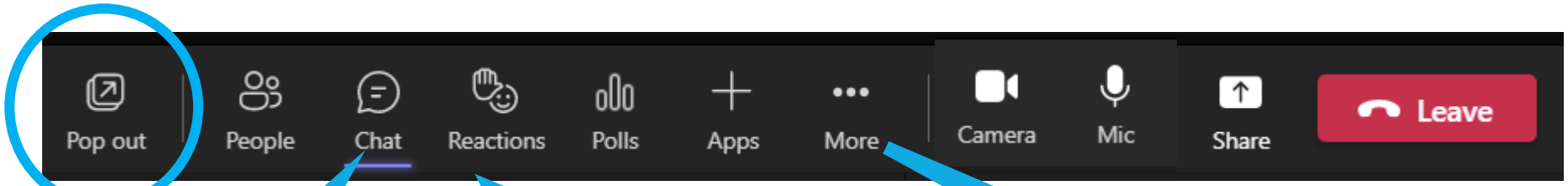
Q1 Residential Coordinating Committee Meeting

Day 1

Tuesday, March 17, 2026

This meeting will be transcribed

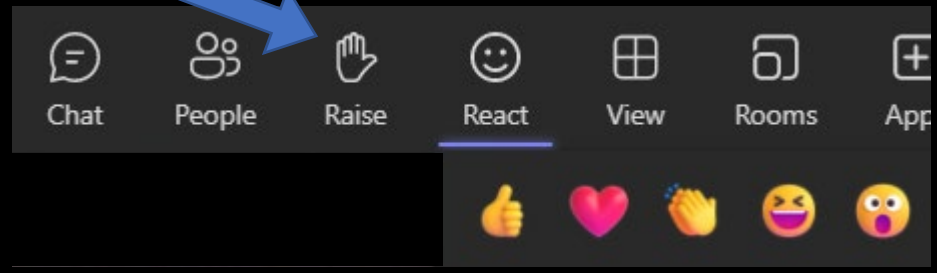
Tools for Today: Engaging on Teams



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

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Heads Up!

“Spotlighting” Speakers

NEEA Visitor Safety Essentials

- Check In
  - Sign in – Wear badge – Stay with host
- Stay Aware
  - Report hazards – Ask questions
- Emergencies
  - Report all injuries to host
    - First Aid and AED in Kitchen
  - Emergency exits are located by each restroom (do not use elevators)

Reminder of RCC Purpose & Role

Purpose

- Coordination and optimization of NEEA's program and related activities, to identify and manage through potential implementation challenges between NEEA & local utility activities
- Seize leveraging opportunities that can drive amplified market influence

Responsibilities

- To **support effective performance of NEEA's programs and related activities**
- Provide **a forum for information exchange** within the region on market and program updates and development, and opportunities for collaboration
- Committee members and NEEA **share a commitment to communicate and coordinate** as part of this Committee with the intent of operating with transparency and clarity

AGENDA

(All times Pacific)

1:00 -1:15 *(15 mins)*	**Welcome, Agenda, Packet Review & Housekeeping**
1:15 – 2:35 *(80 mins)*	**Introductions & Regional Roundtable** *Committee members and NEEA program staff share program and organization updates, highlight areas of possible interest and coordination with others.* *Desired Outcome: All are updated on each other's activities and better understand what's happening across the region.*
2:35 - 2:45	***BREAK***
2:45 – 4:00 *(75 mins)*	**Regional Priority Topic** • **Heat Pump Water Heater –** NEEA Shareout: Highlights from Market Progress Evaluation Report (MPER) 8
4:00 – 4:05 *(10 mins)*	**Recap, Next Steps, Adjourn**

UPDATED AGENDA FOR DAY 2

(All times Pacific)

9:15 – 9:25	**Welcome, Agenda, Packet Review**
9:25 – 10:25	**Regional Priority Topic** • **Advanced Heat Pumps:** Minimizing Supplemental Heat: Coordination on the RTF measure development, Efficiency Exchange, and a 2026 Heat Pump Symposium
10:25 – 10:35	***BREAK***
10:35– 10:55	**Q2 (June 16) Topic Check In** • **NEEA Shareout & Coordination:** NW Heat Pump Symposium results roll out for addressing minimizing supplemental heat with consumers, installers, and manufacturers
10:55 – 11:25	**NEEA Shareout** • **NW Online Marketplace –** Program Update and what's to come in 2026
11:25 – 11:35	**Recap, Next Steps, Adjourn**

Packet Review & Informational Updates

- **<u>Tier 1: Agenda Items</u>**
  - Memo: Heat Pump Water Heater *(pg. 5)*
  - Memo: Advanced Heat Pump Regional Priority Topic & Q2 Topic Check In *(pg. 6-7)*
  - Memo: NW Online Marketplace Pilot Update *(pg. 8)*

- **<u>Tier 3: Additional Resources</u>** *(links on pg. 3)*

  Committee materials (charters & recent meeting resources, functional newsletters (Market Research & Eval, Emerg Tech, Codes + Standards + New Construction)

HOUSEKEEPING

Housekeeping

- Announcements & Reminders
  - Upcoming Meetings & Events
  - NEEA/MT 101

RCC DATES

Q1 (Hybrid)	• Tuesday (today) • Wednesday (tomorrow)
Q2 (Virtual)	• Tuesday, June 16th
Q4 (Virtual)	• Tuesday, December 1 • Wednesday, December 2

Upcoming meetings

Q2 2026 Meetings

- May 5th & 6th – Efficiency Exchange (EFX26)
- May 19th – Regional Portfolio Advisory Committee (RPAC)
- May 27th – Commercial & Industrial Coordinating Committee (CICC)
- June 2nd – Natural Gas Advisory Committee (NGAC)
- June 16th – Residential Coordinating Committee (RCC)
- June 17th - Regional Emerging Tech Advisory Committee (RETAC)
- June 22nd & 23rd – Board Meeting
- August 26th - Cost Effectiveness & Evaluation Advisory Committee Meeting (CEAC)

Efficiency Exchange 2026 (EFX26)

Early Bird Registration

February 9 – April 3

neea.org/EFX

EFX26 In-person Conference

May 5-6 in Boise, ID

Preconference tours and networking on May 4

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
  - Team members not on NEEA committees, but interact with NEEA's work or would benefit from a basic overview
- **Next session: Tues Mar 31, 9-10:30**
- Proposed special topic feature: Emerging Tech
  - Future special topics include: Codes & Standards, Regional Studies & Infrastructure, Market Research/Evaluation, Data Acquisition, MT Barrier Removal, Special Projects
- Contact: Alisyn Maggiora (amaggiora@neea.org)

Other regional / industry events or announcements?

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4:00 – 4:05 *(10 mins)*	**Recap, Next Steps, Adjourn**

INTRODUCTIONS & REGIONAL ROUNDTABLE DISCUSSION

- Name
- Organization
- And…

What's the most adventurous thing you've ever done or would like to do?

- Highlights since Q4 (December) of 2025
  - Programmatic updates
    - What's new? What are you hearing?
  - Organizational updates
  - Any questions for other committee members?

BREAK

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Heat Pump Water Heater 8th Market Progress Evaluation Report Summary

Anu Teja, Sr. MRE Scientist
Emily Rosenbloom, Manager, Program Management
Alex Merrill, Program Manager

March 17, 2026

The Rationale for MPERs

- Track a program's progress towards goals
- Provide the program with real time information for adaptive management
- Conducted annually or every 12-15 months

Research Objectives for HPWH MPER #8

1. Document evidence of HPWH outcome confirming market progress is reported in program efforts.
2. Measure key Market Progress Indicators (MPIs): recommendation & installation rates, consumer awareness, purchaser satisfaction & federal standard adoption.
3. Conduct primary research on customer callbacks for HPWHs.
4. Report on size of the market.

Key Research Methods

- Quantitative web enabled survey with HPWH installers. N=101
- Quantitative web enabled survey with HPWH purchasers. N=451
- Quantitative web enabled survey with Northwest consumers. N=810
- Review of documents related to NEEA's involvement in federal rule making efforts
- Group interview with NEEA program team

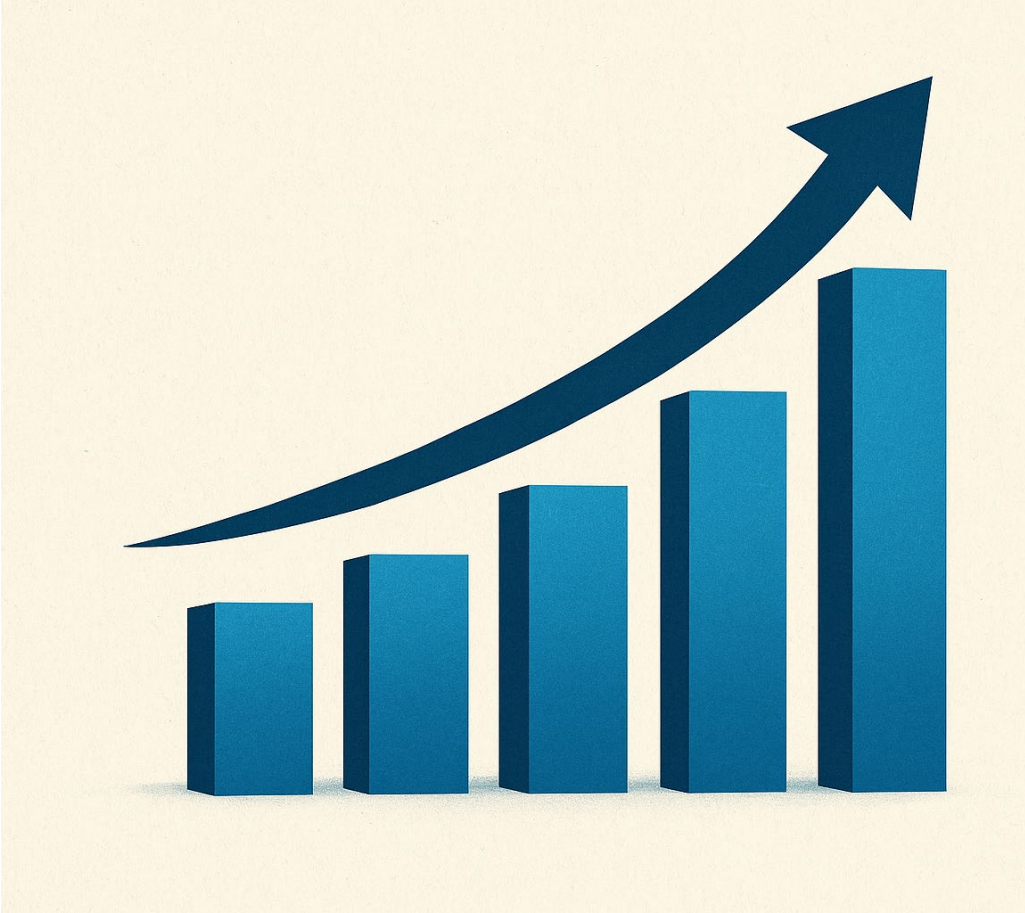
Report out format

- Key takeaways from the report
- Data supporting each finding
- Questions welcomed throughout

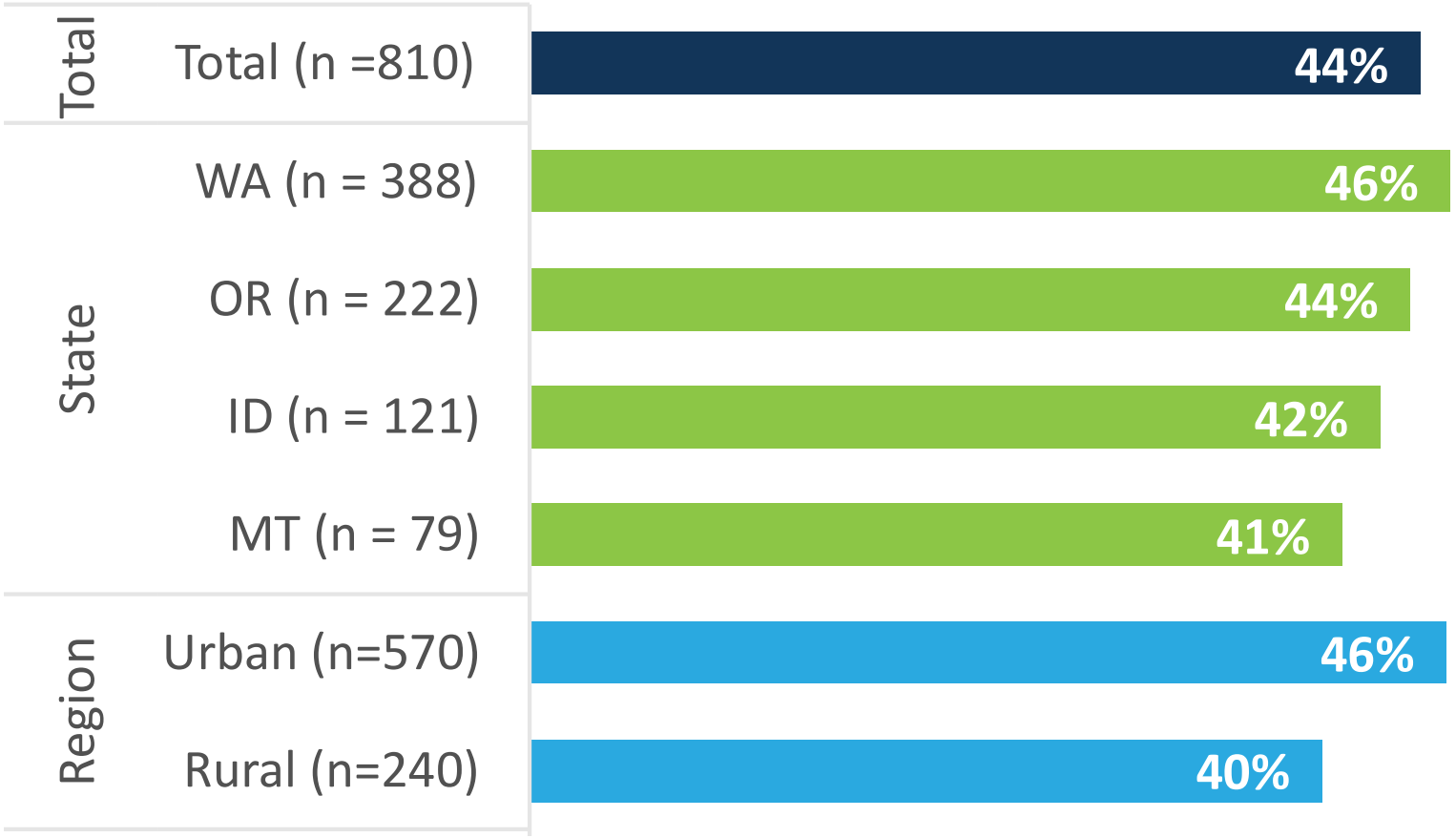
Key takeaway: NEEA has helped lay the groundwork for broad HPWH adoption and increasing consumer awareness should drive further adoption.

Market Share Gains Continue

- Market share has increased 27% between MPER 7 (2021) and MPER 8 (2024)
- All four states observed increases in adoption
- Most significant growth driven by Washington code

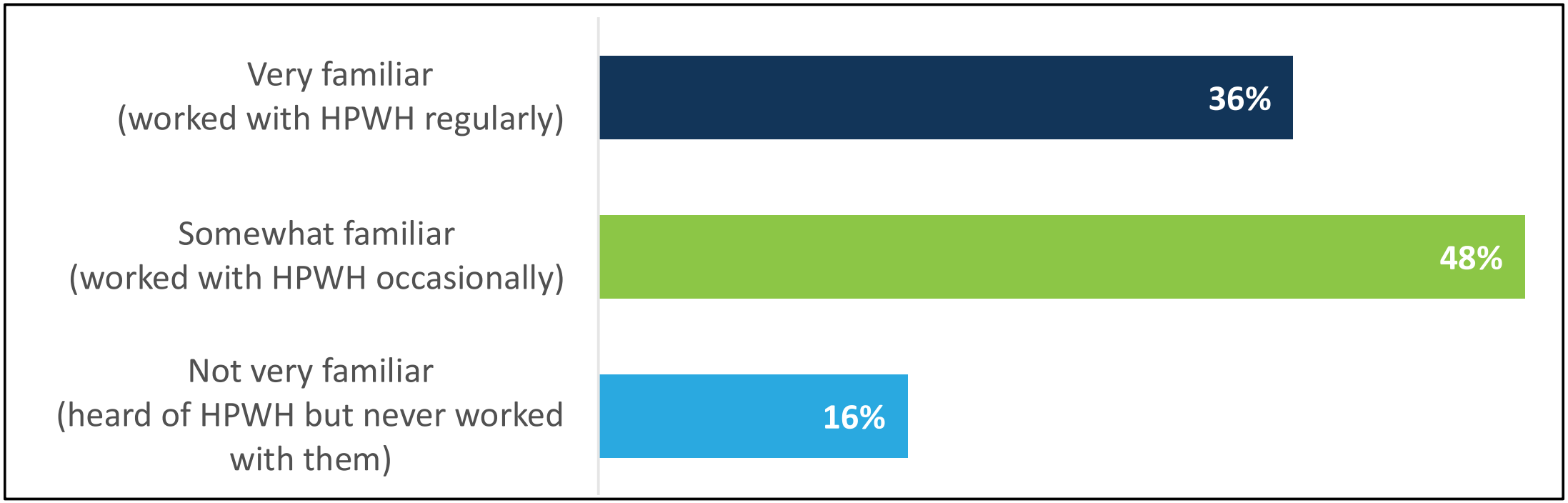


HPWH Awareness is Established



Key takeaway: Installers are aware of HPWHs, though recommendation rates remain low, despite generally high customer satisfaction.

Installer Awareness



Installer Familiarity with HPWHs (n=100)
Question: Before this survey, which of the following best describes your level of familiarity with heat pump water heaters?

Installer Survey

State	Urban	Rural
Washington	47	5
Oregon	27	5
Idaho	18	5
Montana	5	6
Overall	**81**	**20**

**As some installers are active in multiple locations, they may be counted with multiple states.*

Installer Recommendation Rate

Question: When replacing a failed water heater how often was HPWH recommended ?

- MPER 8: 29% (average), 15% (median)
- MPER 7: 31% (average), 10% (median)

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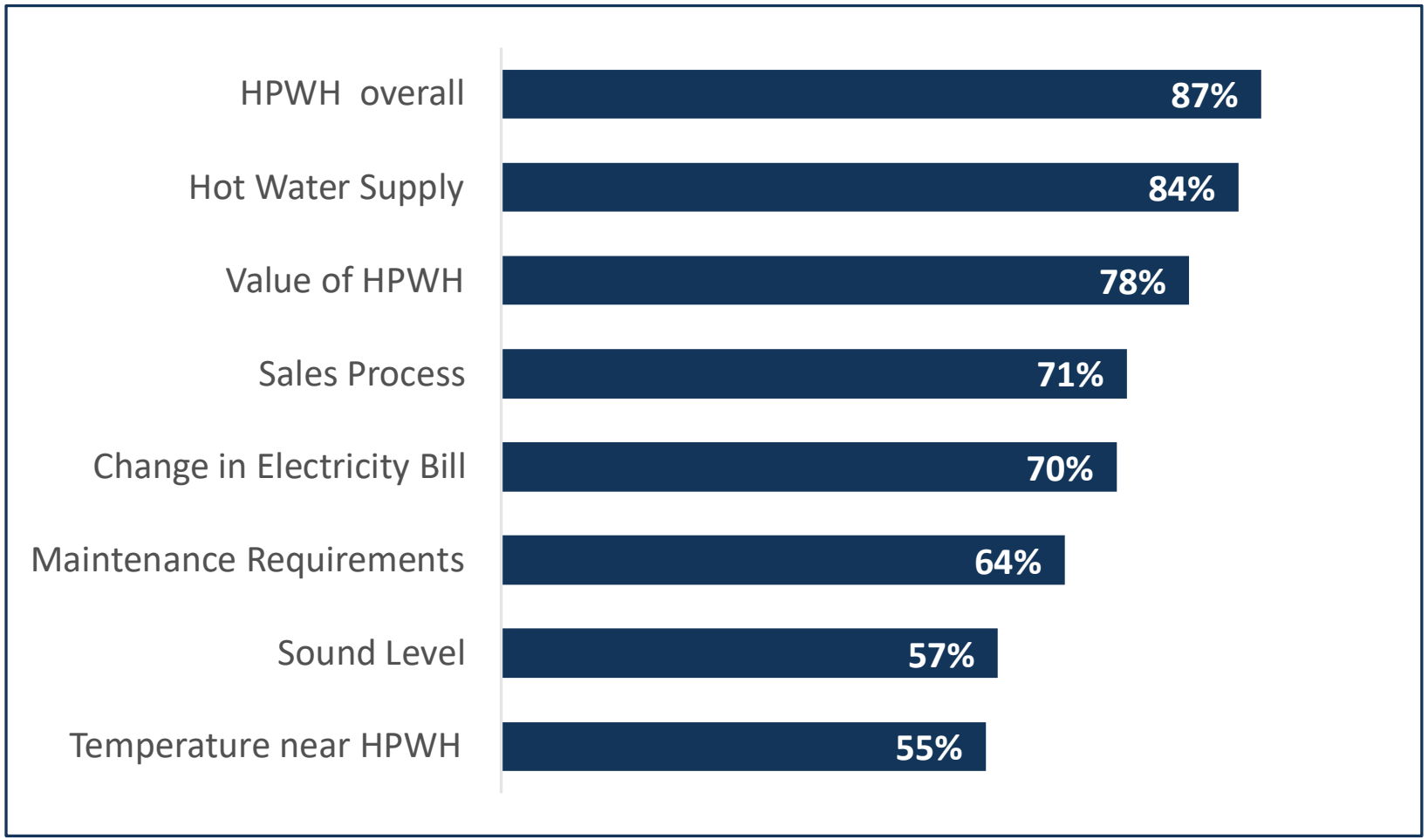
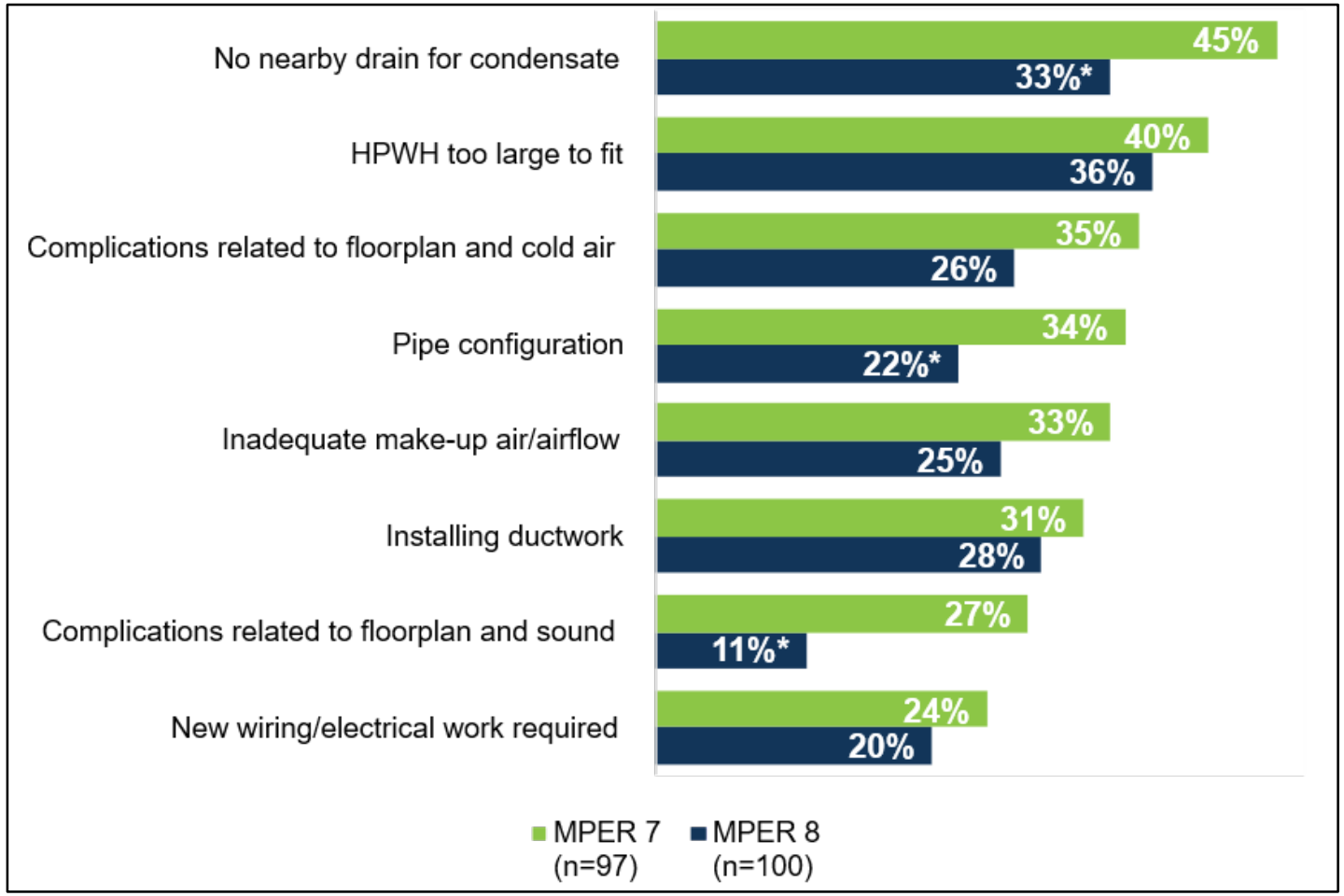
High Customer Satisfaction



Question: How satisfied have you been with the following items on a 5-point scale, where 1 means “very dissatisfied” and 5 means “very satisfied.”

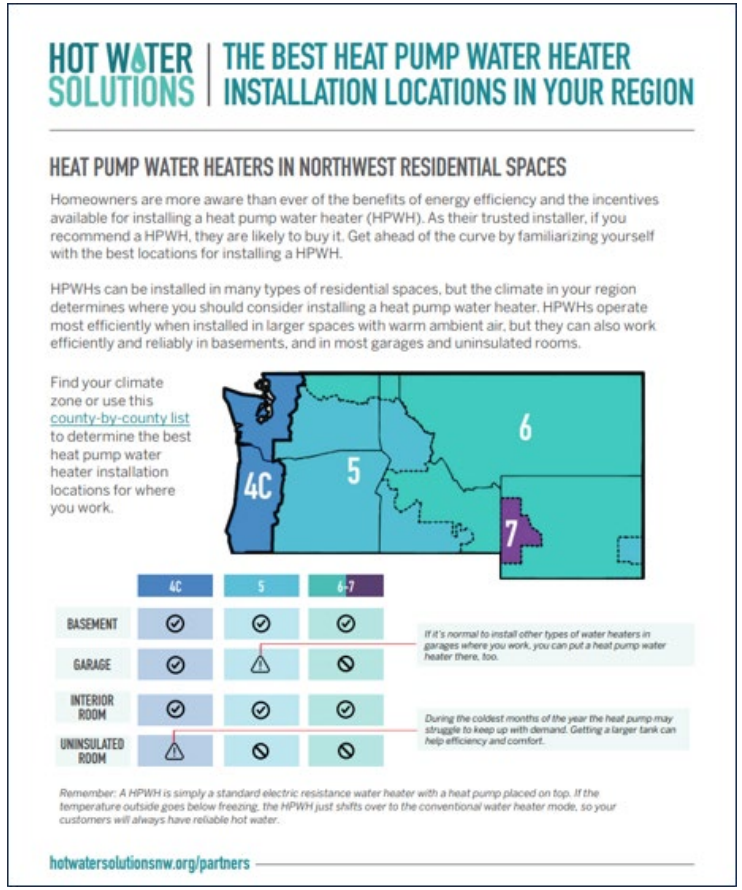
Key Takeaway: Challenging installations are an ongoing barrier to HPWHs, but there are indications that installers can better navigate these installations as their confidence increases.

Decrease in Installation Challenges



Question: How frequently do installation technicians face challenges with the following aspects of a heat pump water heater installation?

Targeted Resources and Training



HOT WATER SOLUTIONS | THE BEST HEAT PUMP WATER HEATER INSTALLATION LOCATIONS IN YOUR REGION

HEAT PUMP WATER HEATERS IN NORTHWEST RESIDENTIAL SPACES

Homeowners are more aware than ever of the benefits of energy efficiency and the incentives available for installing a heat pump water heater (HPWH). As their trusted installer, if you recommend a HPWH, they are likely to buy it. Get ahead of the curve by familiarizing yourself with the best locations for installing a HPWH.

HPWHs can be installed in many types of residential spaces, but the climate in your region determines where you should consider installing a heat pump water heater. HPWHs operate most efficiently when installed in larger spaces with warm ambient air, but they can also work efficiently and reliably in basements, and in most garages and uninsulated rooms.

Find your climate zone or use this county-by-county list to determine the best heat pump water heater installation locations for where you work.

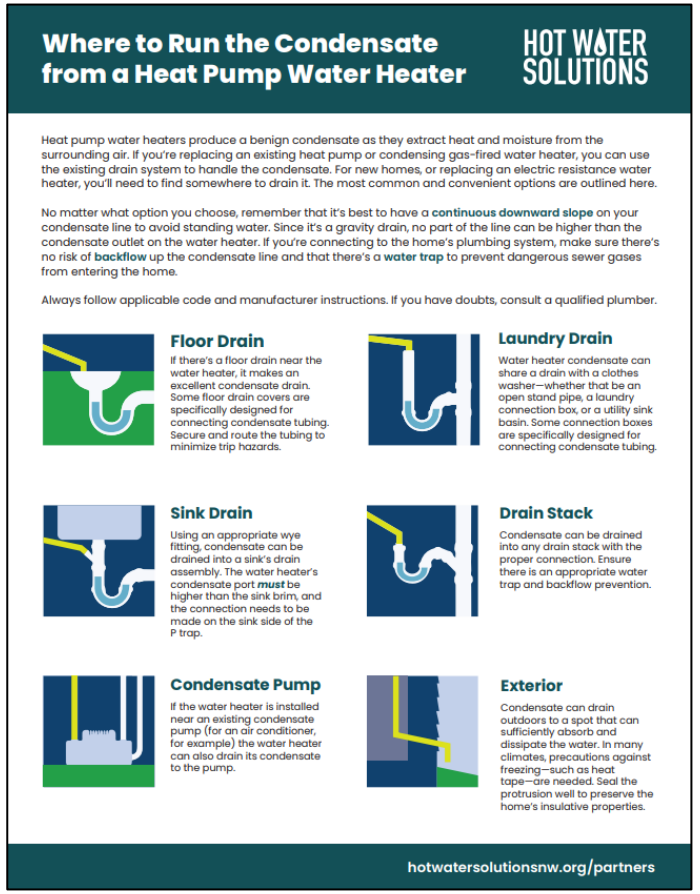
	4C	5	6-7
BASEMENT	✓	✓	✓
GARAGE	✓	⚠	✗
INTERIOR ROOM	✓	✓	✓
UNINSULATED ROOM	⚠	✗	✗

If it's normal to install other types of water heaters in garages where you work, you can put a heat pump water heater there, too.

During the coldest months of the year the heat pump may struggle to keep up with demand. Getting a larger tank can help efficiency and comfort.

Remember: A HPWH is simply a standard electric resistance water heater with a heat pump placed on top. If the temperature outside goes below freezing, the HPWH just shifts over to the conventional water heater mode, so your customers will always have reliable hot water.

hotwatersolutionsnw.org/partners



Where to Run the Condensate from a Heat Pump Water Heater

HOT WATER SOLUTIONS

Heat pump water heaters produce a benign condensate as they extract heat and moisture from the surrounding air. If you're replacing an existing heat pump or condensing gas-fired water heater, you can use the existing drain system to handle the condensate. For new homes, or replacing an electric resistance water heater, you'll need to find somewhere to drain it. The most common and convenient options are outlined here.

No matter what option you choose, remember that it's best to have a **continuous downward slope** on your condensate line to avoid standing water. Since it's a gravity drain, no part of the line can be higher than the condensate outlet on the water heater. If you're connecting to the home's plumbing system, make sure there's no risk of **backflow** up the condensate line and that there's a **water trap** to prevent dangerous sewer gases from entering the home.

Always follow applicable code and manufacturer instructions. If you have doubts, consult a qualified plumber.

Floor Drain

If there's a floor drain near the water heater, it makes an excellent condensate drain. Some floor drain covers are specifically designed for connecting condensate tubing. Secure and route the tubing to minimize trip hazards.

Laundry Drain

Water heater condensate can share a drain with a clothes washer—whether that be an open stand pipe, a laundry connection box, or a utility sink basin. Some connection boxes are specifically designed for connecting condensate tubing.

Sink Drain

Using an appropriate wye fitting, condensate can be drained into a sink's drain assembly. The water heater's condensate port ***must*** be higher than the sink brim, and the connection needs to be made on the sink side of the P trap.

Drain Stack

Condensate can be drained into any drain stack with the proper connection. Ensure there is an appropriate water trap and backflow prevention.

Condensate Pump

If the water heater is installed near an existing condensate pump (for an air conditioner, for example) the water heater can also drain its condensate to the pump.

Exterior

Condensate can drain outdoors to a spot that can sufficiently absorb and dissipate the water. In many climates, precautions against freezing—such as heat tape—are needed. Seal the protrusion well to preserve the home's insulative properties.

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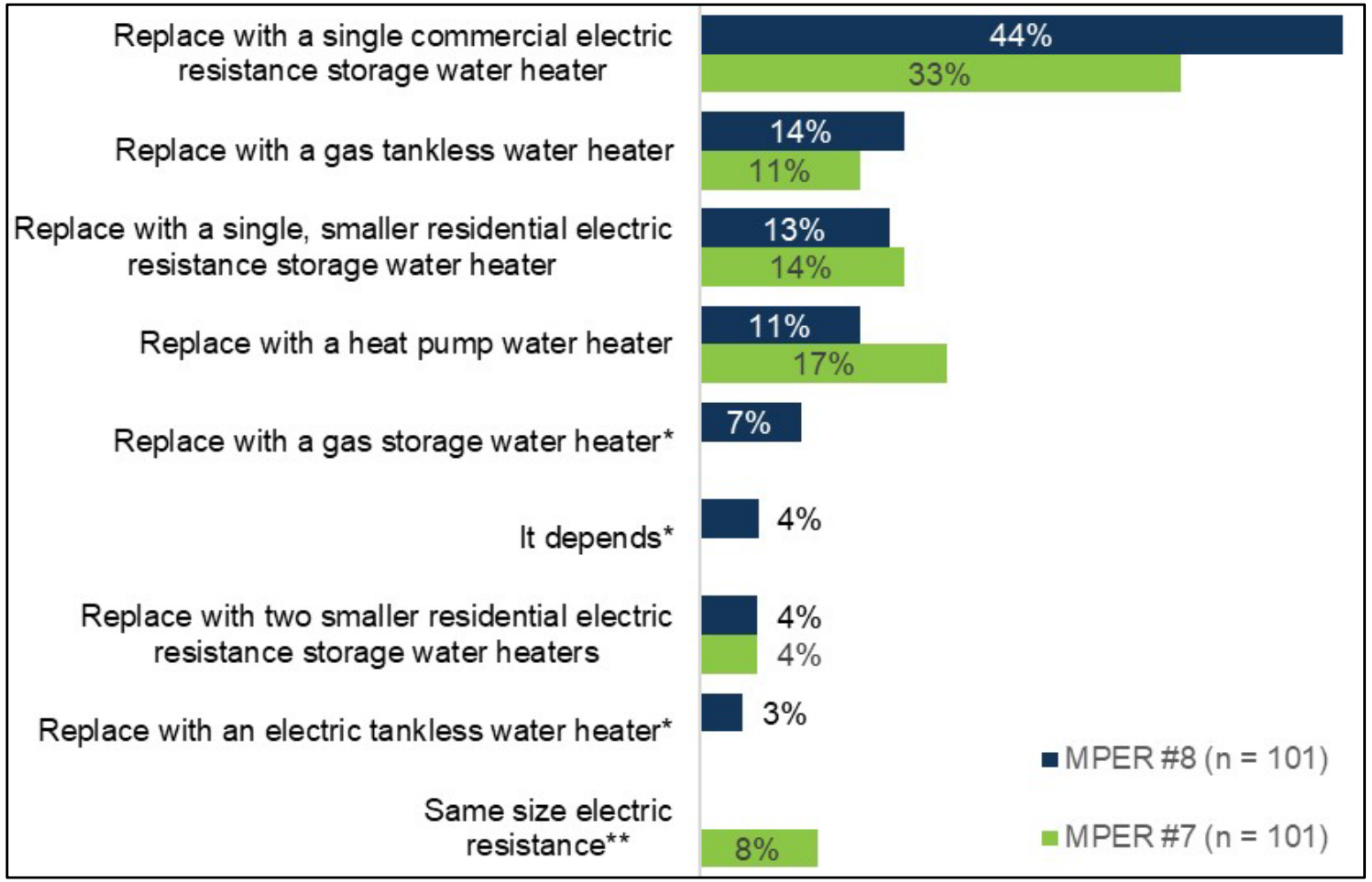
Increase in Installer Competence and Confidence

"Strongly Agree" or "Agree" with Statement	Not Very Familiar (n = 17)	Somewhat Familiar (n = 49)	Very Familiar (n = 37)
My company's installation technicians can easily install HPWH correctly.	44%	85%	97%
I can get HPWH quickly from local distributors.	44%	75%	89%
Replacing an electric resistance water heater with a HPWH will lower a customer's overall energy bill.	62%	62%	86%
HPWH remove heat from the room where they are located.	44%	62%	75%
HPWH are good replacements for traditional electric resistance water heaters.	38%	50%	64%
HPWH are reliable.	31%	40%	72%
My company makes more money when we sell a larger number of low-cost water heaters than when we sell a smaller number of high-cost water heaters.	31%	40%	39%
My company regularly recommends HPWHs to customers.	6%	23%	50%
My company is likely to get customer complaints or service requests soon after installing a HPWH.	0%	33%	25%

Key Takeaways: Installers still use workarounds to avoid installing HPWHs

Replacement of Large Electric Storage Water Heater



Question: When you replace a large capacity (≥55 gallons) electric resistance storage water heater for a residential customer, what is your typical replacement strategy?

Key Takeaway:
Fewer installers reported customer complaints for HPWHs. Issues that do arise may require significant time to resolve.

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Callbacks comparable to other water heaters

25% of installers agree: *"My company is likely to get customer complaints or requests for service soon after installing a HPWH,"* a decrease from 39% in MPER #7.

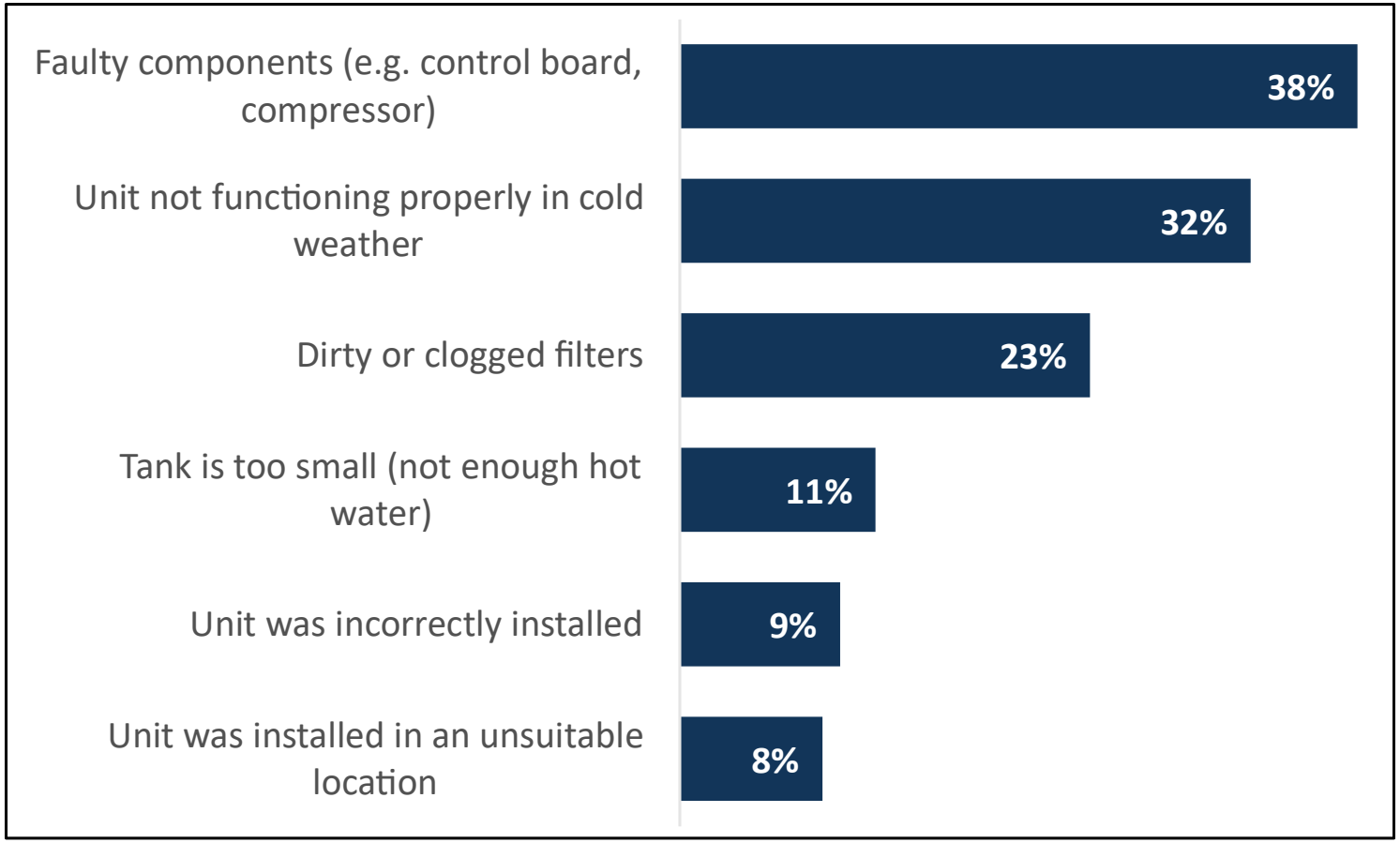
12% of HPWH purchasers with HPWH purchased in the last 5 years (n=396) called a professional for service or repair, similar to **14%** of consumers with an electric resistance water heater purchased in the last five years (n=82).

33% of installers who service or repair HPWHs say they have more issues than other water heaters, and **36%** say HPWHs have fewer issues.

Rate of Service Requests for HPWH Compared to Other Types of Water Heaters

(Installer Survey, n=71)

Frequency of Servicing Issues



Question: In the approximately how many heat pump water heater services calls you have received in the past two years; how often did you encounter the following issues? Your best estimate is fine. If never, enter 0%. (n=71)

Servicing Takes Longer

- 24% of callbacks required multiple conversations with the manufacturer
- 20% needed multiple visits to resolve the issue
- Long lead times for parts
- Just over half of HPWH purchasers who needed a service or repair said their warranty covered all or part of the cost.

Wrap up and Next Steps

Next Steps

- Finalize and publish report
- Program memo – response to recommendation
- Incorporate into program activities and strategy

Thank You!

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Day 2 Topics

- Advanced Heat Pump discussion
- Q2 (June 16) Topic Check In
- NW Online Marketplace Pilot Update

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Meeting Feedback

- One thing you learned / appreciated?

Thank You!

See you tomorrow at 9:15am (PST)

Q1 Residential Coordinating Committee Meeting

Day 2

Wednesday, March 18, 2026

This meeting will be transcribed

Welcome

- Name & Organization
- What's your favorite flavor of pie?

AGENDA

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Advanced Heat Pumps

Suzi Asmus

Advanced Heat Pump Program Manager, NEEA

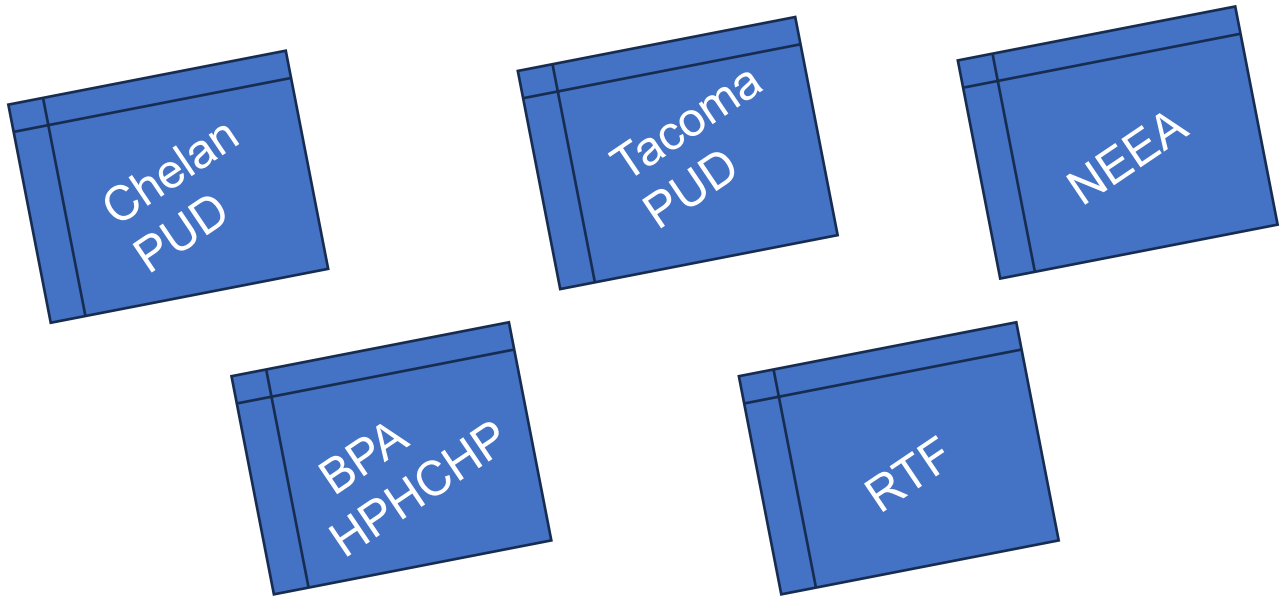
March 18, 2026

Minimizing Supplemental Heat

Context and Coordination

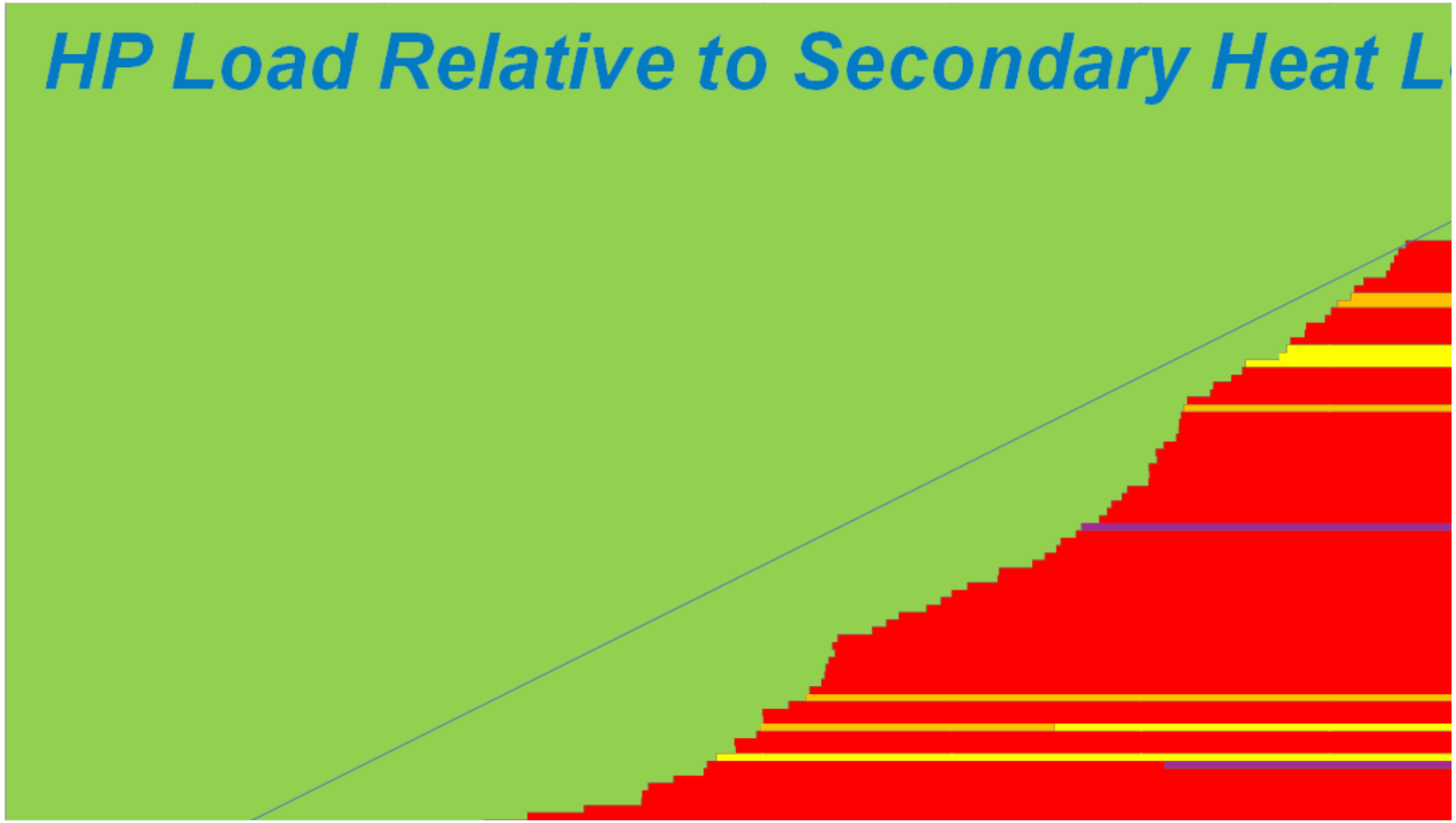
Years of data showing impacts of:

- Nighttime setback recovery
- Strip heat
- High cut-out temperatures



Reliance on Supplemental Heat

RBSA 2023 Data



Only 53% of the load is provided by the Heat Pump

Only 7% of the time when the ER is running, the HP was drawing more than 75% HP max power observed
(why isn't the HP running at full power when ER is running?)

Data Notes

- 127 sites all sub metered at the main panel, 1 min interval data
- Data for Oct-Mar
- Only homes with centrally ducted heat pumps
- Gas furnace components show only electrical use of gas furnace, not BTU burned

Preliminary data from NEEA's residential building stock assessment

Minimizing Supplemental Heat

Context and Coordination

Coordination To-Date:

- CEE Quality Installation education (2021-2024)
- NW Heat Pump Symposium (2023, 2024, 2025)
- Efficiency Exchange (2024, 2025)
- RTF Measure Development

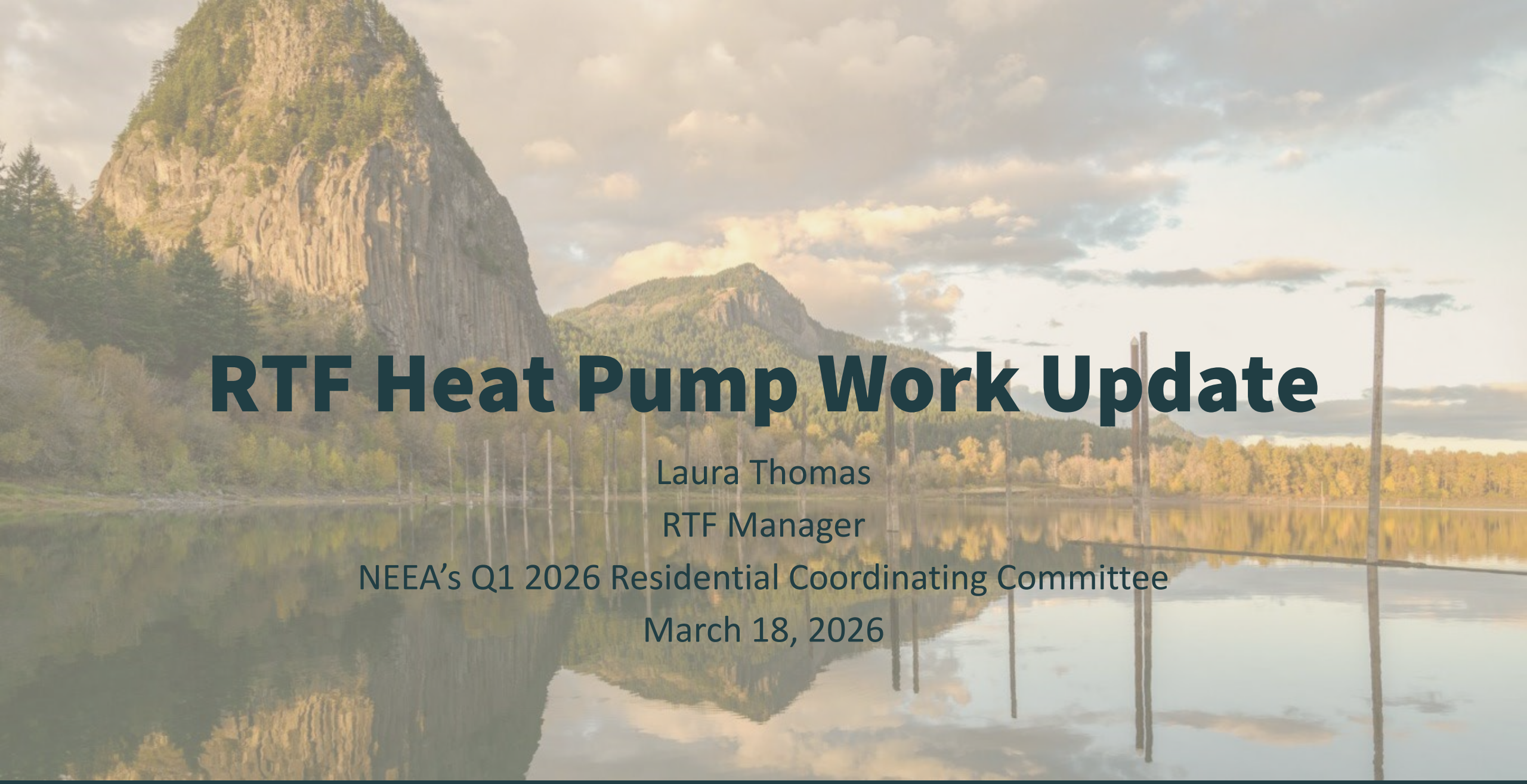
Minimizing Supplemental Heat

Context and Coordination

Laura Thomas

Regional Technical Forum Manager

NW Power and Conservation Council



RTF Heat Pump Work Update

Laura Thomas
RTF Manager

NEEA's Q1 2026 Residential Coordinating Committee

March 18, 2026

Regional Technical Forum

RTF's Current Focus on Heat Pumps

New Measures

Developing new measures to support programs in achieving deeper savings from heat pumps.

Research Coordination

Supporting the region with understanding the current research and technology to identify next steps on research

Existing Measures

Reviewing existing measures in light of new measures.

Measure Work

Residential Measures Only

Regional Technical Forum

Portfolio by Heat Pump Type

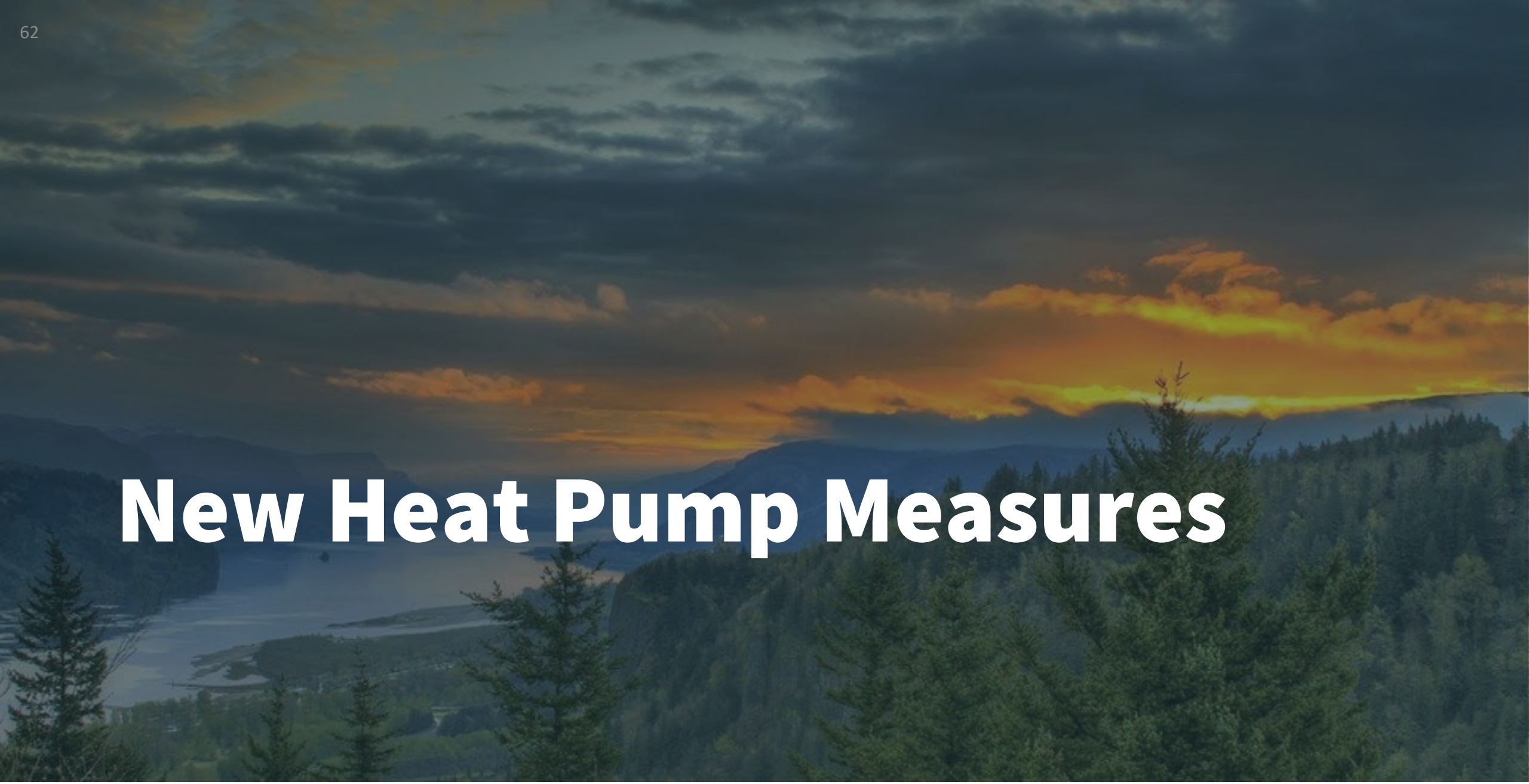
Centrally Ducted Heat Pumps (CDHP)

- Existing UES: Centrally Ducted Air Source Heat Pump Upgrades and Conversions
- New Measure: Centrally Ducted Air Source Heat Pump No or Limited Electric Resistance *(Q2)*
- New Measure: Centrally Ducted Air Source Heat Pump Retrocommissioning *(Q3)*

Ductless Heat Pump (DHP)

- Existing UES: Ductless Heat Pump for Forced Air Furnace and Zonal Heat SF and MH
- Existing UES: Ductless Heat Pump for Multifamily
- Existing UES: Ductless Heat Pump One-to-One
- New Measure: Ductless Heat Pump Multi-head *(Q4)*

Anticipate Completing all New Measures by End of 2026
(current completion timeline)



New Heat Pump Measures

CDHP No & Minimal ER Heat

Regional Goal:

- Increase savings (kWh) and reduce the demand (kW) of new CDHP installations in existing single family and manufactured homes
    - In short, we want these CDHPs to act as CDHPs rather than electric furnaces with expensive central AC

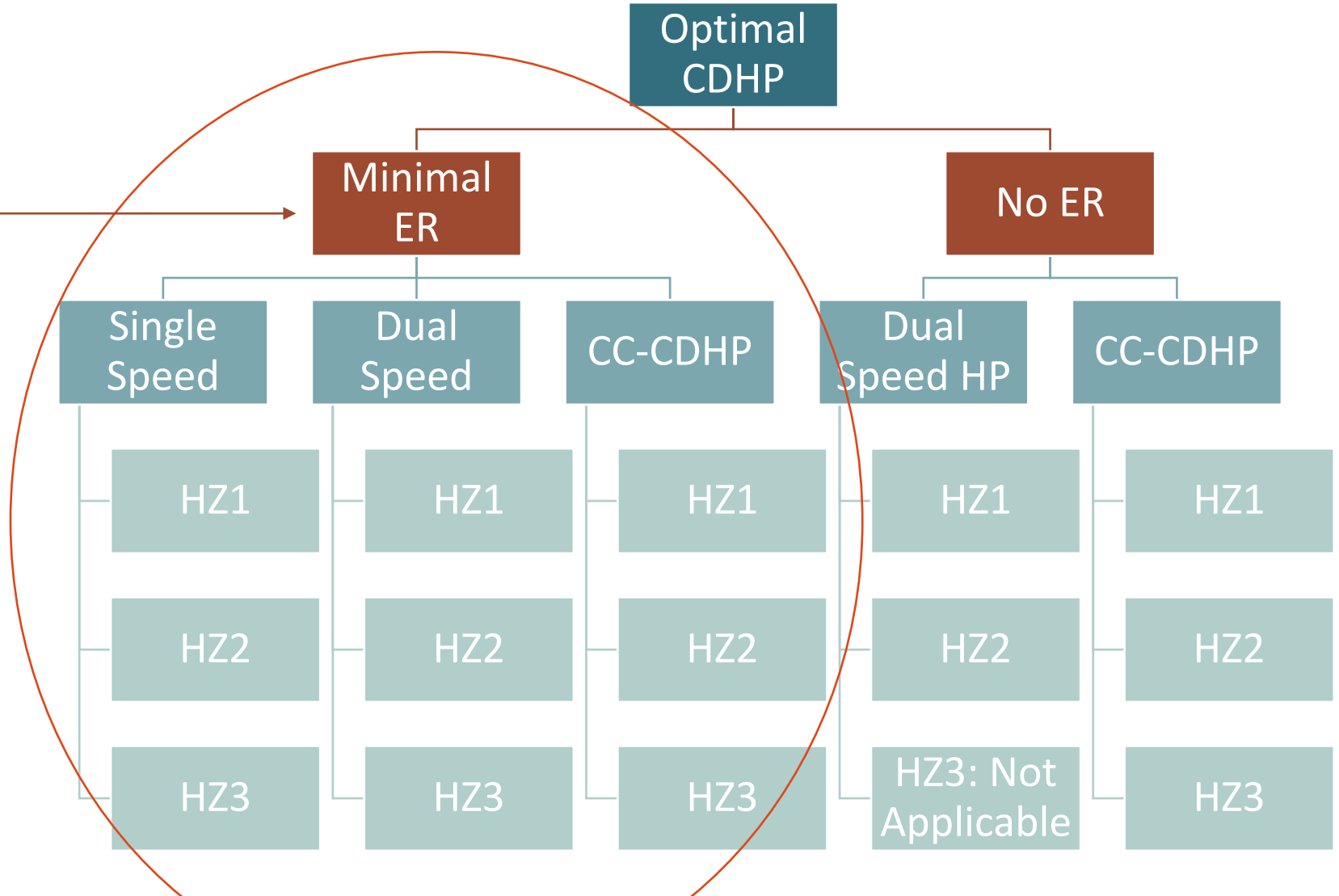
RTF Work Goals:

1. Provide screening criteria for what a heat pump ready home is based on duct condition and home weatherization to ensure maximization of heat pump usage and minimization of electric resistance usage.
    - Enable implementers and power planners to locate heat pump ready homes in the existing stock or know what upgrades are required to make homes heat pump ready to ensure minimal ER usage in the home.
2. Provide Planning savings (kWh) estimates and demand (kW) reductions compared to the appropriate baseline

Centrally Ducted Heat Pump No & Minimal ER Heat Application Tree

Minimal ER may not provide additional savings (kWh) over the current RTF CDHP measure applications dependent on the control of the electric resistance heat.

This may be a steppingstone to normalize the removal of ER heat from the HVAC system for installers, homeowners, and program implementers.



Recent and Next Steps

1. Yesterday, gathered initial feedback from RTF on draft specification.
2. Subcommittee Meeting (March 27) for a cold climate/high performance/etc. heat pump definition
3. Subcommittee Meeting (April 8) to review modeling results and savings
4. Additional Subcommittee meetings as necessary
5. By End of Q2: Final Proposal for RTF Approval

CDHP Retro-commissioning

Regional Goal:

- Increase savings (kWh) and reduce the demand (kW) of existing CDHP installations
    - In short, we want these CDHPs to act as CDHPs rather than electric furnaces with expensive central AC as much as is possible without replacing the CDHP

RTF Work Goals:

1. Specification(s) for ensuring existing CDHPs are maximizing heat pump run time and minimizing ER run time
    - Applicable to CDHPs previously installed through a utility program or outside of a program
2. Savings estimates

Whole Home DHP

Regional Goal:

- Quantify the benefits and costs of whole home DHP solutions for electrically heated zonal homes compared to single head DHP solutions

RTF Work Goals:

1. Specification for the installation of a whole home DHP solution
2. Savings estimates

Research Coordination

Regional Research Coordination

- RTF Policy Advisory Committee approved in the Work Plan for the RTF to support convening researchers to support collaboration and coordination around heat pump research.
- Planned efforts in 2026:
  - Heat Pump 101 Resource and Workshop: Support broader understanding of heat pumps, particularly for program managers and decision makers.
  - Heat Pump Research Gaps Resource and Workshop: Document current heat pump research and identify existing research gaps for workshop participants to discuss and determine next steps to address gaps.

Contact Info

Laura Thomas

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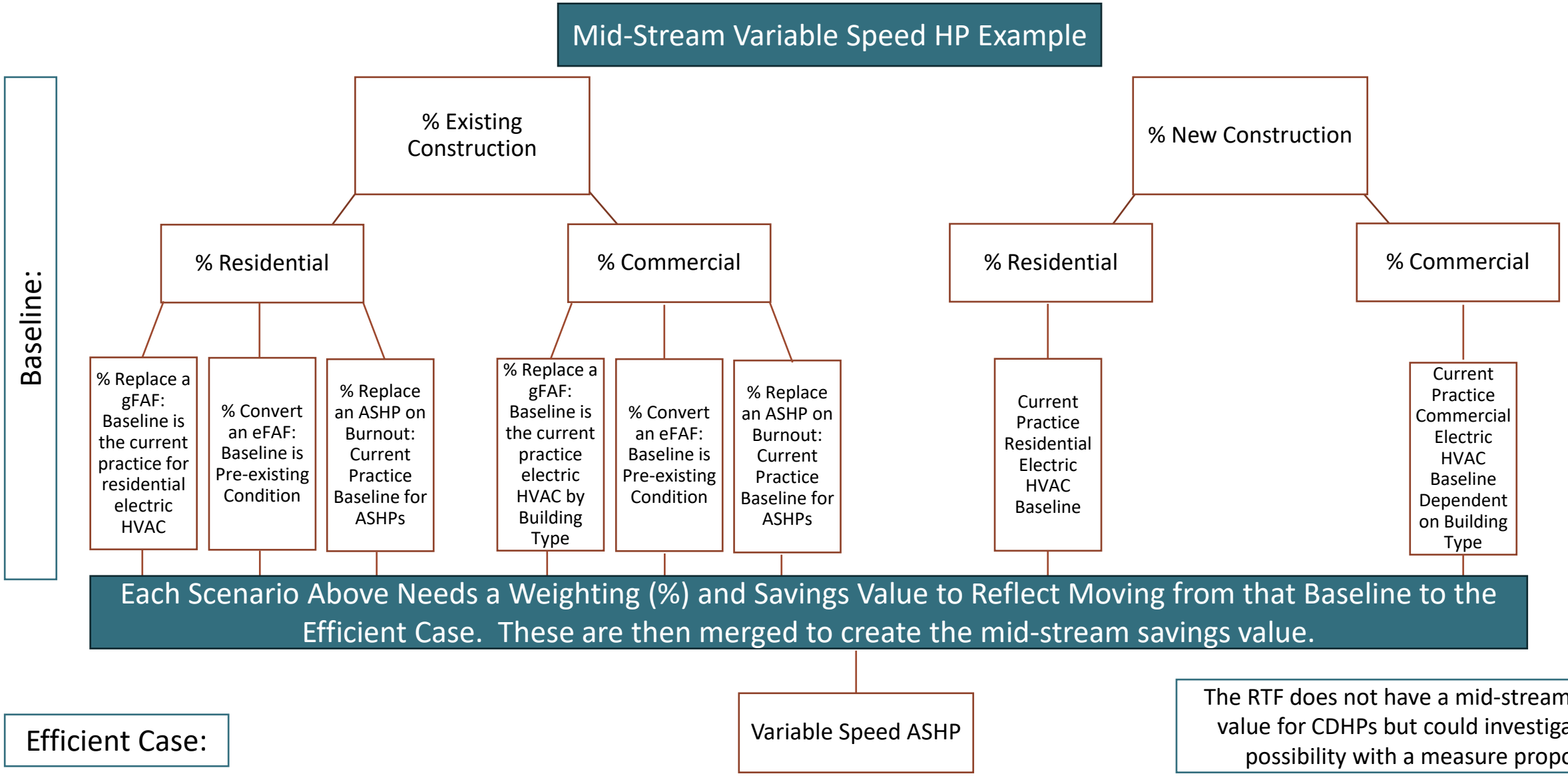
Additional Slides

Mid-Stream Baselines are Very Different From Down Stream Baselines: RTF Heat Pump work is not designed to be usable for mid-stream savings.



The RTF does not have a mid-stream savings value for CDHPs but could investigate this possibility with a measure proposal.

Minimizing Supplemental Heat

Continued Coordination

UPCOMING OPPORTUNITIES:

- RTF Measure
- NW Heat Pump Symposium (May 4)
- Efficiency Exchange (May 5-6)

Minimizing Supplemental Heat

Round Robin

QUESTION:

- **Is your organization working to better understand or address impacts of supplemental electric resistance heat loads?**

Examples:

- Measure development
- Market Research
- Field Research
- Trade ally education
- Consumer education

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Thank You

Suzi Asmus

Advanced Heat Pump Program Manager

sasmus@neea.org

BREAK

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AGENDA

(All times Pacific)

9:15 – 9:25	**Welcome, Agenda, Packet Review**
9:25 – 10:25	**Regional Priority Topic** • **Advanced Heat Pumps:** Minimizing Supplemental Heat: Coordination on the RTF measure development, Efficiency Exchange, and a 2026 Heat Pump Symposium
10:25 – 10:35	***BREAK***
10:35– 10:55	**Q2 (June 16) Topic Check In** • **NEEA Shareout & Coordination:** NW Heat Pump Symposium results roll out for addressing minimizing supplemental heat with consumers, installers, and manufacturers
10:55 – 11:25	**NEEA Shareout** • **NW Online Marketplace –** Program Update and what's to come in 2026
11:25 – 11:35	**Recap, Next Steps, Adjourn**

Q2 TOPIC Check In

June 16, 2026

- Regional Priority Topic: Minimizing Supplemental Heat (Continued):

"Coordination on the outcomes of RTF measure development, Efficiency Exchange, and a 2026 Heat Pump Symposium "

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Northwest Online Marketplace

Background and Pilot Update

Steve Seminario

Market Transformation Manager, Consumer Products
NEEA

Market Transformation Goal & Background

Make it easy for Northwest residents to find, evaluate, compare, afford and source energy efficient products; raise overall energy efficiency of NW consumer product sales

- Enervee was a clear platform choice
- Funded “scanning project” – nw.enervee.com
  - Ran December 2024 through November 2025
  - Search Engine Marketing to drive visitor traffic
- Engaged interested alliance utilities along the way
- Developed Pilot concept and gained NEEA support (2026-2028)

Pilot Concept

2025 NEEA “scanning project” – Basic functionality

nw.enervee.com

2026 – 2028 Pilot Project Key components

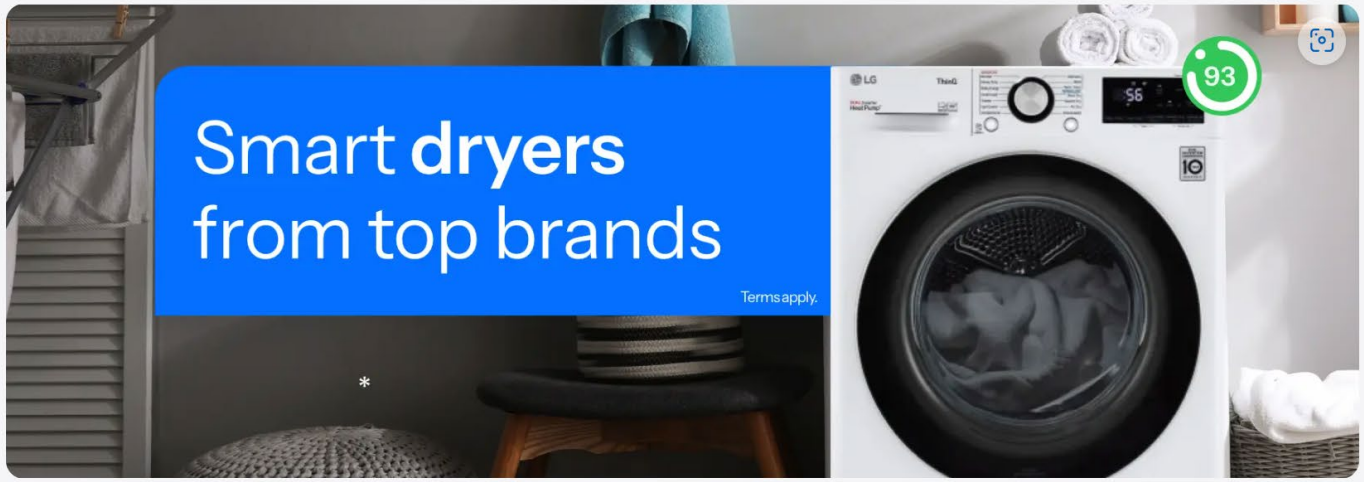
1. Expanded functionality
2. Branded landing-page, personalized experience for participating utilities. They choose level of functionality they want.
3. Participating utilities direct their customers to the site

Enervee Northwest Marketplace

Sign in

Northwest Marketplace

Saving Northwest residents energy, money, and time



Search by type, brand, model...

Search

Televisions

Dryers

Washers

Dishwashers

Explore More Categories

We help you find your perfect product

neea

Northwest Marketplace

Saving Northwest residents energy, money, and time

We help you find your perfect product

Brief demo

nw.enervee.com +

examples of Pilot functionality

Pilot Functionality

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

All participants

- Branded home pages
- Choose product categories
- Choose Choice Engine; Commerce

Options

- Flag Participant rebates
- Link to funder rebate site
- Transact rebate purchases (Commerce)
- Post-purchase rebate processing (Fast Track)

Add when available

- Eco Financing

Participants may explore separately

- Demand Response Enrollments

Pilot Status

- Initial Participants
  - Energy Trust, Idaho Power, NW Natural, Tacoma Power, Clark PUD
- NEEA Team expanded
  - Aaron Winer, Project Development Manager joining
  - Alisyn M, Steve S, Jesse Nienow-Macke continue supporting
- Enervee/NEEA contracting complete
- Enervee/Utility contracting and functionality selections begin

QUESTIONS?

Thank You

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Wrapping Up…

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Action Items / Recap / Final Qs?

- Efficiency Exchange 2026
- NEEA/MT 101

Meeting Feedback

- One thing you learned / appreciated?

Public Comments?

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Thank You!

➢**Q2 2026: Tuesday, June 16| Virtual**