



# Regional Portfolio Advisory Committee

## Q1 2026 Meeting Notes

Tuesday, February 10, 2026

10:00am – 2:45pm PST

Hybrid (Puget Sound Energy – Olympia)

### Meeting Attendees

#### Committee Members:

Spencer Moersfelder, Energy Trust

Bryan Russo, Tacoma Power

Jeffrey Tripp, Puget Sound Energy

Jeff Feinberg, Snohomish Public Utility District

Whitney Jurenic, Northwestern Energy

Lori Moen, Seattle City Light

Lauren Kerr, Portland General Electric

Billie McWinn, Idaho Power

James White, Chelan County Public Utility District

Emily Gilroy, Washington Utility and Transportation Commission

Phillip Kelsven, Bonneville Power Administration

Bill Hibbs, Clark Public Utilities

NEEA Staff: Alisyn Maggiora, Brandon Lindquist, Britt Cutsforth Dawkins, Mark Rehley, Emily Moore, Emily Rosenbloom, Stephanie Quinn, Alexis Muench, Becky Walker

### Resources

- Agenda Packet: [Q1-2026-RPAC-Agenda-Packet.pdf](#)
- Slide Deck: [Q1-2026-RPAC-Meeting-Slides.pdf](#)

### Welcome, Introductions & Agenda Review

#### Housekeeping and Looking Ahead (Slides [9-15](#))

Alisyn Maggiora started the meeting with housekeeping and confirmed the status of several informational memos, including the Northwest Online Marketplace, the Heat Pump Water Heater Work Group update, the Residential New Construction protocol update through the Regional Technical Forum, and the naming update for the High Performance Heating, Ventilation, and Air Conditioning (HVAC) programs. The team highlighted the next 90-minute NEEA and Market Transformation 101 webinar on March 31, intended for committee members who want a refresher as well as other utility or partner staff who would benefit from a fundamentals overview that rotates through special topics; the March 31 session will feature highlights on NEEA's Emerging Tech workstream. The group previewed Efficiency Exchange 2026 in Boise on May 5 and 6 with tours on May 4, walked through the cadence of 2026 committee meetings, noted other regional and industry events, and invited members to share additional announcements. There was a flag to adjust the Q4 meeting, possibly to Monday Nov 2; Nov 3 is elections day.

#### Discussion

**Spencer Moersfelder (Energy Trust):** Have you sent or are planning to send a promotional email about NEEA's MT 101? Is there a limit on attendance?

**Alisyn (NEEA):** Yes, we will be emailing one. There are no limitations on attendance.

## Portfolio Update (Slides [17-21](#) | Packet [3](#))

Emily Moore reflected on 2025 progress and framed priorities for 2026. Heat Pump Water Heater regional market share is approaching twenty percent in the Northwest, which is well above the national average, and the program strengthened installer engagement to build market readiness for the 2029 federal water heater standard from the United States Department of Energy. Collaboration with national retailers is helping increase ENERGY STAR version 9.1 television share, smart pumps and circulators achieved low to mid-twenties market shares, the Advanced Heat Pump team advanced a connected commissioning specification with multiple manufacturers, and Luminaire Level Lighting Controls continued to grow with near universal installer awareness.

For 2026 the focus is to increase Heat Pump Water Heater adoption through regional and national engagement, grow ENERGY STAR television share including pursuit of a third TV retailer participant for the ENERGY STAR Retail Products Platform, broaden the pumps program into agricultural, municipal, and industrial segments, prepare the Efficient Fans program for a Program Advancement vote to enter Market Development in the third quarter, and launch Phase 2 of the Northwest Online Marketplace pilot. The update also reminded of a proposal to add Gas High-Efficiency Dedicated Outdoor Air Systems (DOAS) to the existing electric High-Performance HVAC program for a Natural Gas Advisory Committee decision, while noting other concepts under scanning that could mature later in the cycle.

### Discussion

**Spencer Moersfelder (Energy Trust):** What is a smart pump and circulator?

**Emily Moore (NEEA):** Smart pumps and circulators are a packaged pumping solution that combines a pump, motor, drive and integrated controls into one product.

**Lori Moen (Seattle City Light):** At what point, for heat pump water heaters, do we say the market has transformed and the program begins to scale back?

**Emily Moore (NEEA):** When a program is in market development, we are looking to see if the barriers have been significantly reduced and that the market progress will continue on its own. In addition, we look at market share. Each program has its own unique tipping point. We look at the combination of these indicators before making a decision to transition to diffusion monitoring. We look at market progress indicators through the Market Progress Evaluation Reports (MPER), typically conducted every 18 – 24 months. When we make the decision to make the transition, it is because there is sufficient evidence that market will continue to transform without continued intervention by NEEA.

**Emily Rosenbloom (NEEA):** We are wrapping up MPER 8 for the HPWH program. There is a chart in it that calls out market progress indicators and where we stand now.

**Alisyn Maggiora (NEEA):** When do we think we will introduce the list of what we plan to bring to the portfolio?

**Emily Moore (NEEA):** In Q2, Stephanie Rider will be coming to RPAC and providing a comprehensive look at the portfolio. At that time, she will be able to share what the most promising opportunities are and what the committee should expect for new program advancements in the next 1-2 years.

## Market Transformation Highlight: Hot Water Innovation Prize (Slides [24-41](#) | Packet 4)

Emily Rosenbloom briefed the committee on the Hot Water Innovation Prize, an effort to address a market gap for space constrained installations such as small multifamily buildings and manufactured housing where integrated heat pump water heaters can be hard to site because of footprint, ducting, and sound. With the 2029 update to the National Appliance Energy Conservation Act standard requiring heat pump technology for most electric storage water heaters above thirty-five gallons, a design charrette convened by NEEA confirmed that a split system heat pump water heater would better fit these applications. The competition advances through three phases: qualification, funded project plans, prototype delivery, and laboratory testing. It is now in the prototype phase. Minimum criteria emphasize practicality, including a first hour rating of at least 38-gallons, a Uniform Energy Factor of at least 2.2, a Seasonal Coefficient of Performance of at least 2.4, a compact tank footprint, and at least twenty feet of separation between components. Scoring weights expected sales price, ease of installation, cold climate operation, sound, condensate management, maintenance needs, and optional features such as demand response capability and flexible controls. The team is cultivating nationwide co sponsorships to strengthen the prize package, media reach, demonstration projects, and alignment with utility incentives, with winners expected between the third quarter of 2026 and the first quarter of 2027.

### Discussion

**Jeff Feinberg (SnoPUD):** How are we defining affordable?

**Emily Rosenbloom (NEEA):** Initially we ran it through a cost-effectiveness calculator. We will provide a QR code and rulebook for what manufacturers need to submit. Manufacturers must provide the cost of what it will be for the first entity to the market.

**James White (Chelan):** Why the focus on smaller tank sizes?

**Emily Rosenbloom (NEEA):** Part of it is that there is nothing on the market that fits the size currently. There will be workarounds to a standard; one of the ones we might see will be stacking low boys in homes. Bringing something to market that fits the low boy we hope will deter some workarounds.

**Lauren Kerr (PGE):** How many OEMs are expected to participate in the final phase?

**Emily Rosenbloom (NEEA):** Up to two can participate in phase 3. Up to two can win as well.

**Jeff Feinberg (SnoPUD):** Is there an expectation for how long from the award of the prize to when they are expected to get to the market?

**Emily Rosenbloom (NEEA):** 18 months, I believe.

**Phillip Kelsven (BPA):** There is some emerging technology work going on with space and hot water combination; do we see that going anywhere with these units?

**Emily Rosenbloom (NEEA):** We aren't directly working on that as part of this contest. I am not sure if NEEA is exploring that concept in scanning or emerging tech.

**Mark Rehley (NEEA):** It is something that NEEA has looked into. You will hear it in terms of trimode or monoblock systems. Sanco is an interesting example. That seems to be the direction these combo systems are going. There were new products on the market at AHRI from Daikin and others that are trying to simplify this. Daikin cooling in the summer will dump the heat into

the hot water. It is still complicated to install due to the hydronic routing but we believe this is a solvable problem.

## 2025 Heat Pump Water Heater Consumer Marketing Campaign Results (Slides [43-55](#) | Packet [5-6](#))

Britt Cutsforth Dawkins reported that the 2025 Level Up consumer campaign, designed to increase awareness and consideration rather than immediate sales, outperformed expectations. The campaign delivered approximately 26.5 million impressions, 235,000 ad clicks, an aggregate click through rate of 0.89%, and 1,469 marketing conversions such as rebate lookups, requests for the do-it-yourself installation guide, and installer or retailer exploration. Britt underscored continued broad interest across the region and a narrowing engagement gap between rural and urban audiences. Adding Spanish language placements, and testing ads on streaming audio and Nextdoor in-app advertisements helped reach new audiences in 2025. The streaming ads resulted in a very high listen-through rate (95.41%). Message and creative testing reaffirmed top performing headlines in both English and Spanish and showed new traction for copy centered on reducing energy waste. Spanish language ads matched or exceeded English performance in many channels, especially in display advertising. NEEA staff propose an optimized Q2 2026 awareness and consideration campaign of slightly shorter duration and reduced spend, while maintaining the eight-bit creative, expanding Spanish language media, and fine-tuning the landing experience. The plan positions NEEA's role within a broader market landscape in which manufacturers are expected to increase residential marketing as the 2029 standard approaches. Britt also highlighted a plan to conduct a mid-cycle RPAC+ process check similar to the previous planning cycle.

### Discussion

**Bryan Russo (Tacoma):** Impressions jumped but not a great amount, but clicks and click throughs roughly doubled, site sessions did not roughly double; how do these things work together?

**Britt (NEEA):** Some things about the campaign changed, as we tested new messaging, expanded our audiences, and saw a good response. The targeting changed year over year. Broad awareness campaigns will result in fewer clicks per user, while consideration efforts will have more engagement and a higher clickthrough rate. Meta also allows you to choose to optimize your campaign targeting for website engagement or clicks. We had opted for website engagement in 2024 and this limited who we were reaching a bit, so we tested focusing on clicks in 2025.

**Lauren Kerr (PGE):** Are you planning on incorporating what worked best and refine and go from there?

**Britt (NEEA):** Yes, we will be doing the campaign again and doing that.

**Emily Gilroy (WUTC):** Have seen from EUCI that Spanish-speaking customers are more likely to engage with utility materials than English counterparts when given those materials in their native language.

**Britt (NEEA):** Yes, and I should have noted that the Spanish ads did go to a Spanish language landing page.

**Jeff Feinberg (SnoPUD):** Do we have a sense of the 20% market share, how much is DIY vs. contractor installed?

**Emily R. (NEEA):** That will be in the coming MPER. IIRC, in the retrofit market, about 50% is DIY.

**Lauren Kerr (PGE):** For the v3 launch, are you looking to target users who weren't reached otherwise? Do your users get ad fatigue?

**Britt (NEEA):** Yes, we keep this in mind and try to limit ad fatigue throughout the campaign run dates with frequency caps.

## Round Robin Updates

**Spencer Moersfelder (Energy Trust):** Energy Trust is in the first year of a new five-year planning cycle. They have posted Measure Approval Documents (MAD) and technical guidelines online, and those materials document the key assumptions that feed the measure development process and include the cost effectiveness screening view applied to measures. The files are available in the library as downloadable zip archives, and searching for "MAD" will locate them.

**Jeff Feinberg (Snohomish PUD):** For program updates, commercial lighting finished the year with an even split of savings between the midstream and downstream channels. Incentives for luminaire level lighting controls were intentionally strong, and early in the year some downstream customers were sold controls they did not need. The team made two incentive adjustments and believes the levels are now right sized, which should support more appropriate adoption. The residential new construction program launched at the end of 2023 and saw strong momentum in 2025, incentivizing above code performance and aligning with the approach used for commercial and multifamily. The data center and telecom program launched and initial projects are moving toward closeout. The latest conservation potential assessment again highlights grocery refrigeration as a promising opportunity and the team plans to issue a request for information to validate and scope that opportunity. Snohomish PUD is interested in peers running grocery programs to share their experiences.

**Phillip Kelsven (BPA):** BPA is four months into a three-year rate period. There are leadership changes, with Dan James replacing the prior Vice President of Energy Efficiency, and John Harriston stepping down in April. The team is beginning to recruit utilities for a heat pump water heater pilot. The department will be rebranded from "Energy Efficiency" back to "Conservation" later this year. Following an internal audit, they are increasing cost data collection requirements and will require invoices for customer programs.

**Bryan Russo (Tacoma):** Closed out the 2024/25 biennium at 119% of the biennium target. The 2026/27 CPA target is 26,000 MWh, whereas our internal goal is 46,000 MWh. Leadership desires that we do not exceed conservation acquisition by more than 20%; however, this will not be possible in 26/27 due to program momentum from 24/25. Future portfolios will more closely align with the CPA target. Meanwhile, we are in the early phases of exploring new peak load management programs. From a personnel perspective, we have several retirements: Natasha Houldson, Business Con Manager, is retiring. Mark Aalfs, our NC Program Manager, will also be retiring soon. Scott Cooper has replaced Natasha.

**Jeff Tripp (PSE):** The biennial conservation plan has been approved and a three-year general rate case filing is expected this month, with efforts being coordinated across planning processes. Programmatically, the home energy consultation program has been greenlighted and a Product Development Manager has been hired to advance it. A multifamily demand response pilot is stood up with a few properties engaged. The demand response portfolio has achieved 131 megawatts of nameplate capacity. The performance incentive mechanism threshold for this year is 207 megawatts, along with a requirement to maintain 37 percent of benefits for named communities. On staffing and organization, the demand response group is being reorganized and Kasey Curtis will now serve as supervisor for program coordination supporting financial, regulatory reporting, and communications needs. Colin Stone has been hired to lead the trade ally network. The team size under Jeff is

fourteen and hiring continues. Retirements include Jeff Peterson and Dave Montgomery, Kim Sendasky and Phillip Poppoff.

**Lori Moen (SLC):** There is a new mayor and a change in the utility general manager, with Craig Smith serving as interim General Manager and a new General Manager expected in March. In the efficiency portfolio, they met their 2025 target at about 100 percent, supported by a limited time bonus in midstream lighting, and they launched an energy design assistance offering. Technology roadmap delays are holding back multiple tools and channels, including rebates, the digital marketplace, customer engagement capabilities, and the trade ally platform, which has left residential offerings thin for now. On demand response, they stood up a new segment last year and launched an industrial curtailment program. The bring your own thermostat approach is being pivoted to a virtual power plant model contingent on information technology and distributed energy resource management system progress. A previous commitment to deploying batteries may not continue under new leadership. In transportation electrification, they installed roughly 600 to 700 charging ports last year across customer-facing programs and plan to issue a request for proposals for a new implementer. On staffing, one position is in flux, a senior energy planning analyst role is open, and more positions may follow depending on approvals.

**Lauren Kerr (PGE):** PGE is holding an internal innovation session called Spark Tank to surface early ideas and feedback. They are preparing a request for information to inform water heater flexible load, focusing on what exists in the market and the maturity of capabilities needed for reliability. They are installing communication modules on water heaters at pilot sites to demonstrate flexible load. The customer programs team ran marketplace promotions from October to December to gauge thermostat interest for demand response outreach and saw strong performance through email. In transportation electrification, managed charging demonstrations are progressing, with work to better understand multifamily settings including sites with dedicated and underground chargers. The team conducted Time-Of-Use education with several fleets and observed meaningful shifting of charging to off peak periods. They are evaluating whether automated fleet charging is timely given customer readiness, and at present most managed charging efforts remain at pilot or upstream scale. Lauren and Emily Gilroy plan to connect on these topics.

**Emily Gilroy (WUTC):** WUTC staff are reviewing plans across the board. Avista has a rate case filed and Puget Sound Energy is expected to file soon. Clean Energy Implementation Plans are under review, and Avista has filed its 2025 transportation electrification plan. A team member was promoted to Senior Regulatory Analyst and there may be a backfill. Staff recently wrapped biennial conservation plans and expect the next cycle to surface around May or June.

**Billie McWinn (Idaho):** Staffing has stabilized and the team is fully staffed. The efficient manufactured homes program is suspended for now. The residential portfolio is constrained, and they are exploring a deemed energy savings model for home energy reports to reach more customers. The City of Boise partnered by contributing funding for home energy audits for Boise residents, leading to additional completed audits. In the commercial space, the team is standing up a midstream non lighting program. They are working with energy advisory group on ways to encourage more efficient choices when customers are fuel switching. They are transitioning away from the current in-house program management and payment platform and are building a new in-house solution on a different platform. Idaho Power is also very interested in the NEEA online marketplace pilot.

**James White (Chelan):** Not much to update. Now have a new energy advisor.

## Efficient Fans Program: Refresher for Planned Q3 Milestone Vote (Slides [61-67](#) | Packet [7](#))

Following a brief refresher on Initiative Lifecycle stages, Alexis Muench summarized Efficient Fans' progress since entering Program Development in 2022 and previewed the case for seeking Program Advancement into Market Development later this year. The opportunity is substantial, with roughly 27,000 fan units sold annually in the Northwest, and efficiency is largely locked in at the point of selection through manufacturer and representative software, which creates a strong leverage point to normalize the Fan Energy Index as a common decision criterion. Market barriers include limited awareness of the Fan Energy Index among key actors, inconsistent representation of efficiency within selection tools, and an underdeveloped value proposition when compared with familiar drivers such as first cost, fit, and reliability. The Market Transformation strategy concentrates on manufacturer partnerships to elevate efficiency visibility and value within software and product positioning, education for manufacturer representatives to prioritize higher efficiency options, engagement with specifiers to set and hold higher efficiency selections from design through procurement, and collaboration with industry associations and codes bodies to support durable standards adoption. The working objective is to raise overall fan fleet efficiency by approximately 25 percent above the baseline by 2041, with scope clarified as standalone Fan Energy Index certified fan systems that include the fan, motor, and drive, rather than fans embedded within rated packaged Heating, Ventilation, and Air Conditioning equipment that are governed by separate efficiency metrics. The path to the vote includes this early year preview, delivery of milestone documentation in mid-July, member feedback requested by August 18, and a Program Advancement vote targeted for September 1, with more technical detail planned for the second quarter briefing.

### Discussion

**Lauren Kerr (PGE):** Curious about consultants in this space? An ESCO?

**Alexis (NEEA):** Not specifically intervening with ESCOs, at least initially in the program design. Focus is on manufacturers, manufacturer representatives, and specifiers where we believe there is the greatest leverage and impact from an intervention standpoint.

**Stephanie Quinn (NEEA):** When we are preparing for a milestone like this, we start with larger entities like manufacturers reps and then engage other partners later if we see an opportunity.

**Lauren Kerr (PGE):** Is there a threshold or hurdle established as a minimum for what megawatt average needs to be to pursue new ideas?

**Emily Moore (NEEA):** No. There isn't a hard and fast rule. Need to be balanced from a portfolio perspective and we'll scale resources to the scale of the opportunity.

### Meeting Wrap Up

- Public comment - None
- Meeting feedback – None
- Action Items
  - **ACTION:** Alisyn will provide summary of MT/NEEA 101 semi-annual offerings for RPAC members to share internally, to include link to recording from Oct 1 session.
  - **ACTION:** Alisyn to connect with Lauren regarding program milestone voting process.
  - **ACTION:** Chelan would appreciate a 1:1 Fans discussion once the milestone doc is available (late July)

- **ACTION:** Chelan and Energy Trust would like a team huddle on 2026 HPWH marketing campaign in April
- **ACTION:** NEEA will do a midcycle check-in on the RPAC+ process in 2027
- Next meeting:
  - May 19, 2026 (virtual)