

Natural Gas Advisory Committee

Q2 2026 Meeting (Hybrid)



DATE: Tuesday, June 2, 2026

TIME: 10:30am – 3:00pm Pacific

LOCATION: Hybrid at NEEA’s Office: 700 NE Multnomah, suite 1300; Portland, OR 97212

WEBINAR: [Click here to join the meeting](#) (Meeting ID: 262 859 170 368 384 | Passcode: 7qJ9JD9z)
(if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 766 605 558#

9:00-10:15	Dual-Fuel Work Group Meeting <i>(Note: this meeting is managed separately; if you are in the work group, please see that meeting invite for details or contact Deborah)</i>	Deborah Sunada	n/a
10:00-10:30	Informal coffee chat time	All	

NGAC AGENDA (All Times Pacific)

10:30-10:50 <i>(20 min)</i>	Welcome, Introductions, Agenda Packet Review	Alisyn Maggiora	p. 1-2
10:50-11:05 <i>(15 min)</i>	Housekeeping, Looking Ahead <ul style="list-style-type: none"> • Updates <ul style="list-style-type: none"> ○ Recent Product Council Sessions • Previous Meeting Notes & Action Items: March 3 • Announcements & Reminders <ul style="list-style-type: none"> ○ Upcoming meetings, 2026 NGAC Dates <p><i>Desired Outcome: Committee refreshed on previous meeting notes/action items and aware of significant upcoming items.</i></p>	Noe Contreras Alisyn Maggiora	--
11:05-11:30 <i>(25 min)</i>	Annual Gas Portfolio Review: Savings & Risks <ul style="list-style-type: none"> • Portfolio status & energy savings outlook <p><i>Desired Outcome: Committee members aware of risks and opportunities in the gas portfolio.</i></p>	Stephanie Rider	p. 3-6
60 min	LUNCH	All	
12:30-1:00 <i>(30 min)</i>	Committee Round Robin <p>Special Request: Any new initiatives or adjustments to programs / plans related to affordability? What's the biggest overlap between your EE efforts and affordability needs?</p> <p>General highlights: Big changes (programs/personnel); current challenges, lessons learned; how utility activities relate to NEEA’s; sharable tools/materials; policy directives w/ customers; findings, filings, IRPs.</p> <p><i>Desired Outcome: Committee members and NEEA staff are apprised of latest activities, plans, and organizational updates from alliance members.</i></p>	NGAC Members	--

1:00-1:30 (30 min)	Quarterly Highlights <ul style="list-style-type: none"> Highlights from Q1 Quarterly Progress Report <i>Desired Outcome: Committee apprised of gas portfolio developments.</i>	Melissa Mejia Jason Jones Deborah Sunada Neil Grigsby Noe Contreras Chuck Karras Mark Rehley	p. 7-17
10 min	BREAK	All	
1:40-2:40 (60 min)	Program Expansions Overview and Update <ul style="list-style-type: none"> Initiative Lifecycle for program expansion opportunities Expansion Opportunity Tee Up: Advanced Performance DOAS program to include gas HE DOAS <i>Desired Outcome: Committee members are aware of how NEEA staff are approaching program expansions and what to expect in the upcoming quarters for current opportunities.</i>	Emily Moore Dave Hammond	p. 18
2:40-2:50 (5 min)	Public comment, wrap up and adjourn	Alisyn Maggiora	--

Informational Updates:

- **Page 19-30:** Q1 2026 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Resources:

- [Newsletters on neea.org](#) (Emerging Tech | Market Research & Evaluation | Codes, Standards & New Construction)
- Q1 2026 NGAC meeting materials: March 3 [Packet](#), [Slides](#), [Notes](#)
- [NGAC Charter](#)

REMAINING 2026 NGAC MEETING DATES: *(Reminder, no Q3 standing meeting)*

Quarter	Day(s)	Date(s)	TIME (PST)	LOCATION	KEY TOPICS / NOTES
Q2	Tuesday	June 2	9am-4pm	Hybrid (NEEA)	<ul style="list-style-type: none"> DF Work Group meeting (separate) Annual Portfolio Review (savings + risk) Program Expansions + Gas HE DOAS opportunity
Webinar	Wednesday	Sept 9	1-2:30pm	Virtual	<ul style="list-style-type: none"> Program Expansion Opportunity Review: LLLC + HVAC
Q4	Thursday	Oct 22	9am-4pm	Hybrid (tentative based on topics)	<ul style="list-style-type: none"> TBD: GHE DOAS vote prep
Webinar	Wednesday	Dec 9	1-2pm	Virtual	<ul style="list-style-type: none"> TBD: GHE DOAS milestone vote

Memorandum – *Agenda item (Tier 1)*



May 26, 2026

TO: Natural Gas Advisory Committee (NGAC)

FROM: Stephanie Rider, Director, Portfolio Management, Data Strategy and External Reporting

SUBJECT: Q2 2026 Annual Natural Gas Portfolio Update

Our Ask of You:

Please review the detailed update on NEEA’s electric portfolio below and come with questions and comments to the June 2 NGAC meeting.

Brief Context & Purpose:

The purpose of this agenda item is to discuss three components of the natural gas portfolio:

- Status of energy savings outlook
- Portfolio strategy
- Emerging Opportunities

NEEA’s market transformation portfolio continues to develop and advance for the natural gas portfolio. We will discuss the headwinds affecting the energy savings expectations during this cycle of business (2025-2029) as well as the growth opportunities that we are resourcing to advance for current energy efficiency opportunities and long-term technology pipeline development.

The current portfolio development path for gas is focusing on diversifying the portfolio with more fuel-neutral opportunities and a broader heat pump technology strategy for more dual-fuel system opportunities. Current planned growth includes dual-fuel expansions in four programs: High Efficiency Dedicated Outdoor Air Systems, Luminaire Level Lighting Controls paired with HVAC controls, Efficient Rooftop Units, and Advanced Commercial Water Heating. There is also an emerging opportunity in new dual-fuel residential water heating products expected in 2027.

Provided below is supplemental information that will not be covered in the meeting. It covers the spectrum of highlights across our work in 2025. These activities and achievements are all components to the larger transformation roadmap that NEEA engages in on behalf of the region and the product groups it serves to create sustainable efficiency conditions for long-lasting efficiency choices for purchasers and consumers.

2025 Portfolio Highlights

NEEA collaborates with stakeholders across the Northwest and nationally to advance the adoption of energy efficient technologies. Work includes:

- Data collection, research, evaluation, and analysis
- Product development and testing
- Market implementation

These efforts help bring higher efficiency products and services to market, ultimately benefiting consumers and businesses, and generating energy savings. Below are key highlights for 2025.

Data Collection, Research, and Analysis

Building Stock Assessments

NEEA has five regional studies that hit milestones in 2025. The data collection phase of the 2025 Commercial Building Stock Assessment finished, and the study began developing data and reporting deliverables that will be posted on neea.org in the first half of 2026. The Home Energy Metering Study and Commercial Energy Metering Study both finished metering and deinstalled most meters. The study will now focus on analyzing the data and sharing key insights. The Motor-System Stock Assessment selected and onboarded two firms and began study-design and planning work. Lastly, NEEA formed the 2027 Residential Building Stock Assessment working group and with their input developed a request for proposals document that will be released at the beginning of 2026.

Market Data and Research

NEEA's Market Research and Evaluation team managed nearly 40 third-party research and evaluation studies to support alliance Market Transformation programs, building codes, and new product standards work, as well as NEEA's special project work in end use load flexibility and whole building/building performance standards. Some gas-related research included:

- Identifying purchase motivators for people with high-efficiency gas equipment to see if and where there is a market for a commercialized gas heat pump water heater.¹
- Exploring the opportunities and barriers for adding gas to NEEA's High-Performance HVAC program, characterizing the market landscape, and assessing specifiers' perceptions of system configurations in hypothetical scenarios aligned with the program's targeted approach.²
- Increasing the region's understanding of gas and electric water heating systems across a selection of commercial buildings in the Northwest.³
- Completing the first Market Progress Evaluation Report for the Efficient Rooftop Units (ERTU) program.⁴ The study found that six manufacturers currently offer ERTU products, including two of the five leading ERTU manufacturers. While adoption is still emerging, integrated energy recovery ventilator models appear to be gaining more traction than bolt-on options.

In addition, the team managed work on projects that measured compliance with updated building energy codes in Idaho, and Oregon. These projects, along with the codes' market progress evaluation and a review of NEEA's approach for developing counterfactual baselines for state energy codes, provide the market with valuable information on the market's response to code changes, informs strategy, and supports evaluation of NEEA and its partners' influence on building energy codes.

Data Processing

NEEA continued to refine its commercial HVAC installation tracking process as well as expand market coverage. NEEA collects sales data, relying on relationships with regional HVAC suppliers. NEEA augments the data by matching equipment model numbers to equipment efficiency attributes from the Air-Conditioning, Heating, and Refrigeration Institute certification database. NEEA's goal is to continue minimizing manual data cleaning and to expand its coverage with distributors as well as add sales through manufacturer representatives.

¹ [High Efficiency Gas Water Heater Research - Northwest Energy Efficiency Alliance \(NEEA\)](#)

² [Commercial HVAC Specifier Market Research: Gas High Efficiency DOAS - Northwest Energy Efficiency Alliance \(NEEA\)](#)

³ [Market Research on Existing Water Heaters in Select Commercial Buildings, Final Report - Northwest Energy Efficiency Alliance \(NEEA\)](#)

⁴ [Efficient Rooftop Units Market Progress Evaluation Report #1 - Northwest Energy Efficiency Alliance \(NEEA\)](#)

Product Development and Testing

Emerging Technology

NEEA's emerging technology team routinely scans for, assesses, and reports on the potential for newly identified efficient products, services, and practices. Once opportunities are identified, NEEA works with manufacturers to encourage creating products that meet regional needs and are confirmed to save energy. As a regional organization, NEEA focuses on opportunities that have broad benefits across the four Northwest states, including places that have unique barriers and opportunities for efficiency, such as rural markets and colder climates. By working together and aggregating investment, NEEA's funders and stakeholders share both the costs and the risks associated with bringing new energy efficient technology to markets.

In 2025, the emerging technology program conducted research to scan new products for NEEA's gas energy efficiency portfolio. The work included:

- A field study of 13 homes to investigate the flexibility and affordability benefits of dual-fuel residential HVAC systems in various climate and energy market conditions.
- A field and energy modeling study to test the benefits of integrating lighting and HVAC controls to expand the product and benefits of NEEA's current Luminaire Level Lighting Controls program. The crosscutting control system technology could provide a new avenue for energy savings in small-to-medium commercial buildings where control systems are not typical.
- A test of residential-sized gas fired absorption heat pump design for broad residential and commercial applications. Field data showed the hybrid system could achieve net efficiencies of up to 136%, with gas savings of 54% in hot water-only mode and up to 55% in combined heating modes at the multifamily site. At the residential sites, the system achieved net efficiencies between 110% and 130% in combined heating modes.⁵

Test Procedures and Energy Efficiency Standards

In 2025, NEEA staff served as an important voice in representing utility, industry, and market-wide impacts from Department of Energy (DOE) proposed rollbacks to certain Federal efficiency standards. The DOE has not yet issued final rules on these proposed rollbacks, which may be due, in part, to the breadth and depth of comments submitted by NEEA and other stakeholders representing a diverse group of manufacturers, industry trade associations, energy-efficiency advocacy groups, consumer advocates, and state and local government representatives. Because the DOE's standards program is not as active at the Federal level, NEEA has also been active in supporting state agencies in the Pacific Northwest to ensure that effective and efficient products continue to be available for consumers, as well as focusing on the development and improvement of test procedures for several products. These new test procedures will ensure that the latest technology is adequately represented and yield metrics that can effectively differentiate better-performing equipment in the market.

Market Implementation

Efficient Rooftop Units (ERTU)

In 2025, the program developed four new marketing resources:

- A case study for the KBOO Community Radio field demonstration,
- A re-design of the BetterBricks Efficient Rooftop Units page,
- A brochure for distributors that explains the benefits of the ERTU specification elements,

⁵ [Gas-Fired Absorption Heat Pump: Hybrid System Approach Field Study - Northwest Energy Efficiency Alliance \(NEEA\)](#)

- A one-page flyer on ERTU program details.

The team also started development on a website campaign for 2026 that will help building owners or facility managers identify how ERTUs would be a good option for HVAC equipment replacement projects.

The program has made progress with manufacturer representatives identifying projects and applications suited for qualified efficient RTUs (e.g. schools, sports facilities, and other building types with high-ventilation needs). The program is looking to incentivize case study development and support for manufacturer representatives promoting qualified products.

The program also kicked off the Energy Recovery Ventilators /Heat Recovery Ventilators cleaning market study with MarketWise. Objectives are to gather perspectives on operational considerations for installing, commissioning, cleaning, and maintaining ERVs/HRVs, and investigate what ERV/HRV cleaning and maintenance looks like in real-world applications. A final report will be available in 2026.

Finally, NEEA completed a modeling study on commercial HVAC efficiency measures for various types of commercial rooftop units. The goal of broadening the modeling efforts to cover a greater portion of the United States is to enhance the region's understanding of how measure and tier impacts vary by climate region, which could eventually inform the development of a national program applicable to the RTU market and representative federal efficiency metrics for this product.⁶

High Efficiency Dedicated Outside Air Systems

NEEA is exploring opportunities to expand its Commercial High-Performance HVAC electric program to include gas products. The team is assessing the projected market potential, savings estimates, cost effectiveness, and barriers/opportunities to present to NEEA's gas-funding stakeholders in 2026.

Water Heating

The Advanced Commercial Water Heating program finished a market characterization report that should be published later this year. NEEA also continued engagement with manufacturers and tested the products through field demonstrations including a commercial gas heat pump system. NEEA is working with the North American Gas Heat Pump Collaborative on a new feasibility study to identify potential savings and market opportunities for a gas system for use in the commercial multifamily market. NEEA is also co-funding a Gas Technology Institute project to develop a new tool for designing and optimizing commercial water heating heat pump systems.

The research and analysis will help the program move into market development in 2026/2027.

⁶ [National Efficient Rooftop Unit Energy Modeling - Northwest Energy Efficiency Alliance \(NEEA\)](#)

Introduction

Twice annually, the NEEA Gas Team provides Activity Report updates for their respective programs, as well as Emerging Technology and Codes & Standards updates. These reports highlight key program activities, as well as coordination and stakeholder engagement opportunities.

Please take a moment to review the reports. If you have any questions or would like to discuss specific items further, feel free to reach out directly to the corresponding contact for that section.

- Efficient Rooftop Units pages 2-3
- Advanced Commercial Water Heating pages 4-5
- Dual-Fuel Residential HVAC pages 6-7
- Emerging Technology pages 8-9
- Codes, Standards & New Construction pages 10-11

Contact:

- [Emily Moore](#) Director, Market Strategy & Execution
- [Mark Rehley](#) Director, Codes, Standards, New Construction, Emerging Tech
- [Neil Grigsby](#) Sr. Market Transformation Manager, Water Heating
- [Melissa Mejia](#) Program Manager, Advanced Commercial Water Heating
- [Deborah Sunada](#) Sr. Program Manager, Dual-Fuel Residential HVAC
- [Jason Jones](#) Program Manager, Efficient Rooftop Units
- [Noe Contreras](#) Sr. Product Manager, Dual-Fuel Residential HVAC
- [Chuck Karras](#) Sr. Product Manager, Advanced Commercial Water Heating

ADDITIONAL RESOURCES:

> [Quarterly NEEA Newsletters](#)

> [Quarterly Report / ED Update](#)

> [2026 Operations Plan](#)

EFFICIENT ROOFTOP (RTUs) | HVAC Product Group

Jason Jones | Program Manager | jjones@neea.org

Market Transformation Goal: Ultimately, the ERTU (*reminder – program name is changing to Advanced Performance RTU*) program will provide evidence needed to support an updated federal standard by 2034 that requires at least 20% more efficient RTUs than the 2020 market average.

Product Description: A packaged rooftop unit, or RTU, is a type of HVAC system that contains all the components needed to provide conditioned air and ventilation in one concise unit and is located on the roof of a building. Packaged rooftop units are commonly found in light and large commercial applications. They are very popular with retail and industrial properties.

Program Status: Market Development Phase (Oct. 2022 – present)

Sectors: Commercial, gas HVAC

Target Markets: Commercial HVAC

Implementation Contractors: Energy350, Resource Innovations

Program Activities	Q1 2026 Highlights
<p>Key 2026 Operations Plan Activity: RTUs Program HVAC Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> Working with Energy Trust’s Existing Buildings on a project in Salem, OR for planned RTU replacement. Project has moved into the procurement stage. The program is seeking to conduct field studies to validate the National RTU Energy Modeling (linked below) for gas-fired (gas or hybrid heating) RTUs. Please share any leads in your service territory. Contact Jason Jones at jjones@neea.org for more information.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> Manufacturer Rep outreach is ongoing (details in Market Progress Report). The program has identified multiple projects with reps to include Efficient RTUs as a replacement for code-level equipment. Manufacturer outreach is ongoing (details in Market Progress Report). Working closely with manufacturers to increase uptake of qualified products in the region in partnership with the rep networks. <p>Market Research:</p> <ul style="list-style-type: none"> Market Progress Evaluation Report (MPER) #2 contract and scope is currently being defined and will commence in 2026. Energy Recovery Ventilators (ERV) Ownership and Maintenance Report of Findings has been posted. Key findings show that ERV/HRVs are not inherently more burdensome than other commercial HVAC, but workforce familiarity shapes outcomes. ERV/HRV Ownership and

	<p>Maintenance Market Research - Northwest Energy Efficiency Alliance (NEEA)</p> <ul style="list-style-type: none"> • Rooftop Unit Lead Time Study contract has been awarded, and is currently being finalized and will commence in Q2 2026. Research objectives include: defining typical processes and timelines for RTU replacement projects and circumstances that trigger code or structural reviews. <p>Other:</p> <ul style="list-style-type: none"> • Program continues to work with the Consortium of Energy Efficiency (CEE) to include expanded commercial HVAC values to the Air Conditioning, Heating and Refrigeration Institute (AHRI) directory to inform utility program needs.
<p>Resources for Utilities</p>	<ul style="list-style-type: none"> • Advanced performance RTUs: System requirements & compliant equipment • Advanced performance RTUs - BetterBricks • National Efficient Rooftop Unit Energy Modeling - Northwest Energy Efficiency Alliance (NEEA)
<p>Anything else??</p>	<ul style="list-style-type: none"> • Team members attended the AHR Expo in Las Vegas in early February to meet with manufacturers and supply chain partners. One manufacturer is planning on expanding their double-wall (R12+) offerings. • Team presented at ASHRAE Winter Conference (February) and ACEEE Hot Air Forum (March) on findings from the National Efficient RTU Energy Modeling that was completed in 2025.

Initiative Lifecycle



ADVANCED COMMERCIAL WATER HEATING (ACWH) | Water Heating Product Group

Melissa Mejia | Program Manager | mmejia@neea.org

Market Transformation Goal: Increased market adoption of efficient commercial gas heat pump and dual fuel water heating systems will provide the data necessary to influence federal standards that mandate progressively higher efficiencies for gas water heating equipment. Eventually, Thermal Efficiency values exceeding 1 will become the minimum standard for commercial gas water heaters.

Product Description: Gas Heat Pumps and Dual-Fuel Commercial Water Heating Systems

Program Status: Program Development Phase (Dec 2024 – present), Program Advancement Milestone planned for Q2 2027

Sectors: Commercial, gas & dual-fuel water heating

Target Markets: Multifamily, Lodging, Full-Service Restaurants

Implementation Contractors: N/A

Program Activities	Q1 2026 Highlights
<p>Key 2026 Operations Plan Activity: ACWH Program Water Heating Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> The program is seeking to test gas heat pumps in a Northwest hotel or full-service restaurant application. Please share any leads in your service territory. Contact Melissa Mejia at mmejia@neea.org for more information.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> The dual-fuel pilot is ongoing, with no disruptions in hot water delivery. The system has achieved efficiencies above 1 and a reduction in gas usage. The gas heat pump field demonstration installation was delayed due to shifting market conditions. The project was adapted to test a different product, and installation is scheduled for Q2. The Commercial Water Heating Lab Testing RFQ and Limited RFP process was completed. This work will measure gas heat pump performance in hotel applications across Northwest climate zones. The Engagement Support RFP was published to neea.org. This project will develop and facilitate Manufacturer and Key Stakeholder Engagement Plans. <p>Market Research:</p> <ul style="list-style-type: none"> Received the Final Report for the Market Characterization of Commercial Water Heating Systems in Select North American Regions in partnership with the North American Gas Heat Pump Collaborative.

<p>Resources for Utilities</p>	<ul style="list-style-type: none"> • Dual-Fuel Pilot Installation Video • Market Research on Existing Water Heaters in Select Commercial Buildings • Robur Heat Pump Field Trial • Commercial Building Stock Assessment 2019
<p>Other Highlights</p>	<ul style="list-style-type: none"> • Received the Dual-Fuel Domestic Hot Water Feasibility Study final report. The report covers market landscape, multifamily gas savings potential, regulatory and technical analyses, design standardization, and market transformation strategy. The report will be published to neea.org. • A dual-fuel controls optimization project in Lakewood, WA was scoped and is scheduled to begin in Q2. • NEEA is co-funding a Gas Heat Pump Sizing Tool Development effort with GTI, which is scheduled to kick off in Q2.

Initiative Lifecycle



DUAL-FUEL RESIDENTIAL HVAC | HVAC Product Group

Deborah Sunada | Sr. Program Manager | dsunada@nea.org

Market Transformation Goal: More efficient and grid-enabled dual-fuel systems will become the standard dual-fuel solution; manufacturers will produce and promote these systems; and contractors will design and install the most optimal systems, delivering reduced energy waste, grid flexibility, cost savings, and year-round comfort.

Product Description: The efficient product is a residential condensing forced air ducted gas furnace combined with a low-load efficient heat pump (HP). The dual-fuel system (DFS) requires a controller (which could be as simple as a thermostat) that determines when to operate the HP or furnace.

Program Status: Program Development Phase (September 2025 – present)

Sectors: Residential, gas HVAC

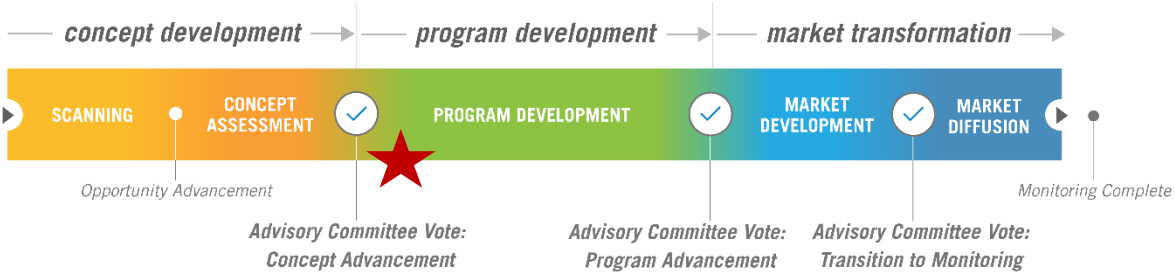
Target Markets: Single-Family Residential Homes

Implementation Contractors: TBD

Program Activities	Q1 2026 Highlights
<p>Key 2026 Operations Plan Activity: Dual-Fuel Res HVAC Program HVAC Product Group Strategy</p>	
<p>NEEA-Identified Coordination Opportunities</p>	<ul style="list-style-type: none"> • Technology demonstration completed and data analysis underway. Report expected to be completed by Q3 2026. • The program will conduct field studies to evaluate residential thermostat settings, including switchover points, to identify values with a high likelihood of user adjustment and reduce post-commissioning changes • Serving as an advisor to GTI Energy on the Cascade Natural Gas dual-fuel demonstration in Bend, Oregon.
<p>Key Updates</p>	<p>Program:</p> <ul style="list-style-type: none"> • A Dual-Fuel literature review and gap analysis are underway to determine additional pilots and demonstration opportunities. Final report to be available by Q3 2026 • GTI Energy lab testing of dual-fuel system (Heat Pump + Hydronic AHU) underway • GTI Energy modeling dual-fuel systems with expanded analysis on retail price, performance, marginal emission factors and building size • Dual-Fuel (Furnace + Heat Pump) lab testing complete (co-funded with Utilization Technology Development (UTD)), final report pending. <p>Market Research:</p> <ul style="list-style-type: none"> • Market Characterization study underway with expected completion in Q4 2026

	<p>Other:</p> <ul style="list-style-type: none"> Program continues to work with the Consortium of Energy Efficiency (CEE) to align on a Residential HVAC dual-fuel specification to inform utility program needs.
Resources for Utilities	<ul style="list-style-type: none"> Dual-Fuel HVAC White Paper Dual-Fuel and Gas Heat Pump Market Research Dual-Fuel Heat Pump System Analysis
Technical Research	<ul style="list-style-type: none"> TriMode Electric Monobloc ATW Heat Pumps with Gas Backup for Affordability and High Efficiency Lab study ongoing – (Co-funded with UTD)
Other Notable Highlights	
Manufacturer Engagement	<ul style="list-style-type: none"> Met with manufacturers at AHR 2026, see Scanning for more details Met with Rinnai in Q1 2026, discussing Companion product at Technology and Market Assessment Forum

Initiative Lifecycle



Scanning / Emerging Tech

Other notable highlights.

<p>Gas High Efficiency Dedicated Outside Air Systems (GHE DOAS)</p>	<ul style="list-style-type: none"> • The first wave of data results has come in from a GHE DOAS measurement & verification (M&V) field study at an office building in Salem, OR. This site will be studied into 2027, and the results will be instrumental in characterizing the real-world performance throughout both heating and cooling seasons. • The GHE DOAS team is finalizing an agreement with (2) 3rd party vendors to provide incremental cost analyses for a GHE DOAS system design vs baseline design options. • The activities listed above are in support of a targeted Q4 proposal to NGAC, seeking expansion of the existing electric-only High-Performance HVAC program to include a gas (GHE DOAS) option.
<p>Luminaire Level Lighting Controls (LLLC) with HVAC Control</p>	<ul style="list-style-type: none"> • Current pilot is still underway, we will have a preliminary report by end of June 2026. • In talks with multiple utilities to secure more pilot sites in the Northwest. • Working with PNNL on some data and modeling work.
<p>Dual-Fuel Residential HVAC</p>	<ul style="list-style-type: none"> • Oak Ridge National Laboratory developing an emulator control platform for dual-fuel HVAC • Advisor to residential dual-fuel heating systems in Bend, OR through a partnership with Cascade Natural Gas and GTI Energy • Working with Consortium for Energy Efficiency to frame out a dual-fuel specification consideration
<p>Dual-Fuel Residential Water Heating</p>	<ul style="list-style-type: none"> • Navien partnering with GTI Energy – Emerging Technology Program lab testing a dual-fuel hydro-furnace • Field testing to begin late Q2, 2026

<p>North American Gas Heat Pump (GHP) Collaborative (Commercial)</p>	<ul style="list-style-type: none"> • Completed the Commercial Water Heating Market Characterization Report and provided a utility webinar on May 1 • A commercial Gas Heat Pump savings assessment is in-progress and a draft report is expected by the beginning of June. • Manufacturer Engagement: • The Collaborative is monitoring developments with SMTI and plans to re-engage for updates after their initial 45-60 day window expires. • Commercial Committee members are working on finalizing an agreement with NGIF to support Vicot product certification for North America.
<p>Conferences / Events Highlights</p>	<p><u>Q1 Conference Highlights:</u></p> <ul style="list-style-type: none"> • Hot Water / Hot Air Forum <ul style="list-style-type: none"> ○ Laboratory, Field, and Modeling Results for Gas Absorption and Electric Heat Pump Water Heaters. Provided insights from modeling across multiple building types and systems. • 2026 ASHRAE Winter Conference <ul style="list-style-type: none"> ○ Smarter Heating in Cold Climates: Emerging Approaches to Dual-Fuel System Design. Provided insights from modeling relevant to sizing, switchover controls, and supplemental heating • Technology and Market Assessment Forum <ul style="list-style-type: none"> ○ Gas Use and Opportunities for Restaurants. New technology is evolving the commercial kitchen. Onsite energy solutions is an opportunity with AI/data centers.

Codes, Standards, & New Construction

Other notable highlights.

<p>State Codes</p>	<ul style="list-style-type: none"> • Washington - The State Building Code Council (SBCC) continues to work on developing final drafts of 2024 WSEC-C and WSEC-R, after which a public comment period will be opened to solicit any further input. The release of these drafts, which has been delayed multiple times, is now expected to occur in June 2026. • Oregon - In Q1 2026, the Building Codes Division's (BCD)'s advisory boards met to review and act upon the proposed energy code changes for 2026 ORSC. The Residential and Manufactured Structures Board voted to approve these draft changes, with one minor amendment, at its February 2026 meeting. The (nonvoting) Construction Industry Energy Board reviewed the draft 2026 ORSC changes at its March 2026 meeting. The 2026 ORSC is scheduled to be finalized in late 2026 and to go into effect April 1, 2027. • Idaho - In Q1 2026, the state legislature took up the 2024 building codes rules package developed by the Building Code Board (BCB) over the past several years (see docket 24-3930-2502). This 2024 I-codes update, including an amended version of the 2024 IECC, was approved unanimously by the Senate Commerce committee but failed to pass the House Business committee. With this year's legislative session having since concluded, Idaho's energy code will not be updated until next year at the earliest. • Montana - The Montana Building Code Council (BCC) has started to review the 2024 IECC for potential adoption. In Q1, 2026, the Department of Labor and Industry posted its proposed amendments to the 2024 IECC as well as the other I-codes, though no official deadline for feedback was provided to stakeholders.
<p>International Energy Conservation Code</p>	<ul style="list-style-type: none"> • In Q1 2026, the IECC Commercial and Residential Consensus Committees reconvened to process the second round of code change proposals. Nearly all proposals were fully reviewed and processed by the end of the quarter, and balloting on these final 2027 IECC changes is expected to begin in May. • NEEA staff currently serve on the Commercial Consensus Committee, the Commercial HVAC subgroup and the Residential Modeling & Whole Building subgroup.
<p>National Standards</p>	<ul style="list-style-type: none"> • No new dockets were opened by Department of Energy in Q1 2026.
<p>State Standards</p>	<ul style="list-style-type: none"> • Washington and Oregon are considering several possible state standards, but no schedule or timing for public comment have been released.

<p><i>New Construction</i></p>	<ul style="list-style-type: none"> • NEEA staff and the BetterBuiltNW team continue to work with the Regional Technical Forum (RTF) on the New Homes Protocol (Protocol). The Protocol defines the savings calculations for the Performance Path measure, which regional utilities can use to offer incentives on new homes. The Protocol review was extended into Q3 2026, and the RTF expects to finalize an updated Protocol by early July 2026. The BetterBuiltNW team will then update the Performance Path measure, reflecting changes to the Protocol and state code baselines. • The BetterBuiltNW training team delivered a training at this year's Montana Codes Education Conference in Missoula. • Monthly BetterBuiltNW newsletters were published and distributed, with topics including heat and energy recovery ventilators (HRVs/ERVs), a preview of the BuildRight Conference, and a look back at the top 2025 newsletter articles. Current and past newsletters can be found on BetterBuiltNW's website.
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Memorandum – Agenda item (Tier 1)



May 21, 2026

TO: Natural Gas Advisory Committee (NGAC)

FROM: Emily Moore, Director, Market Strategy & Execution
Dave Hammond, Senior Program Manager, Commercial HVAC

SUBJECT: Program Expansions Overview and Update on Gas High-Efficiency DOAS

Our Ask of You:

In the Q2 NGAC meeting, NEEA staff will provide an overview of program expansions and the proposed stakeholder engagement approach to advance these opportunities when they cross the electric and natural gas portfolios. Additionally, NEEA staff will share an update on the current opportunity to add gas high-efficiency dedicated outdoor air systems (DOAS) to the existing, electric Advanced Performance DOAS program (program name change underway from High-Performance HVAC). **Please review the context provided below and bring any questions, feedback, or concerns to the Q2 NGAC meeting.**

Brief Overview of Program Expansions:

In both the electric and natural gas portfolios, new opportunities are emerging that expand the scope of an existing program. Many of these opportunities cross fuels and may ultimately lead to dual-fuel funded programs. By definition, program expansions are the advancement of a technology or solution that is closely aligned with an existing NEEA program and can be effectively delivered by adapting that program's scope, intervention strategies, and market approach. Program expansions leverage established market knowledge, relationships, and infrastructure to reduce duplication, lower incremental risk, and accelerate entry into Market Development. Because the opportunity is lower risk and benefits from strong programmatic synergy, development can move more quickly while maintaining standards and expectations of NEEA's Initiative Lifecycle (ILC) process. In the Q2 meeting, NEEA staff will share the proposed approach for stakeholder engagement and review of program expansion opportunities, using the expansion of the Advanced Performance DOAS program and advancement in the Natural Gas portfolio as a real-time example.

Expansion of the Advanced Performance DOAS Program:

The Advanced Performance DOAS program aims to transform the commercial HVAC market in the Northwest by accelerating adoption of very high efficiency DOAS, or systems that separate heating and cooling from ventilation and enable optimal operation of each component. The existing electric program advanced to the Market Development phase in 2022 and focuses on: educating and motivating manufacturer's representatives and distributors to promote the system approach; raising end-user and supply chain awareness of the approach and its benefits; and providing market data and evidence to influence the advancement of local, state and federal codes to require elements of, and/or the system approach, in its entirety.

Currently, the program focuses on all electric components, but when using the same design principles with systems that use condensing gas boilers, there is a significant gas savings potential. In addition to delivering gas savings, expanding the program to include gas systems could help engage important market segments in this design approach, such as larger buildings and across schools, and help accelerate the overall market transformation effort by being able to engage building owners and designers regardless of their fuel choice.

In the Q2 meeting, NEEA staff will share more information about the program, the development of the gas opportunity, and next steps for stakeholder engagement, leading up to a planned Program Advancement milestone vote for NGAC in Q4.

Please contact [Emily Moore \(emoore@neea.org\)](mailto:emoore@neea.org) if you have questions about the approach for program expansions, and [Dave Hammond \(dhammond@neea.org\)](mailto:dhammond@neea.org) about the Advanced Performance DOAS Program.

Market Progress Quarterly Report

Residential



Retail Products
Portfolio



Heat Pump Water
Heaters



Advanced Heat
Pumps

Commercial and Industrial



High Performance HVAC



Extended Motor Products



Efficient Rooftop Units



Efficient Fans



Luminaire Level Lighting
Controls



Advanced Commercial
Water Heating

Infrastructure



BetterBricks

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal	
Retail Products Portfolio (RPP)	Anne Brink	Electric	Leverage midstream incentives to influence retail stocking practices, ultimately driving manufacturing and standards for a portfolio of energy efficient products sold through the retail channel.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Advance heat pump dryer and refrigerator readiness for further market adoption in Cycle 7.	Initiate testing of refrigerators by Q2 2026. Produce initial insights on product updates for heat pump dryers by Q4 2026.	Complete one of the following activities: Initiate testing of refrigerators by Q2 2026. Produce initial insights related to product improvements for heat pump dryers by Q4 2026.	On target	The contracts are signed for refrigerator testing of adaptive technologies and testing should begin by the end of Q2. All-in-Ones with heat pump dryers are being evaluated to assess potential consumer dissatisfiers with this product category. The project is on track to deliver initial insights in Q4.
Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026. Add TV incentives to ESRPP by Q3 2026.	Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026. Add TV incentives to ESRPP by Q3 2026.	Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026.	Heads up	A major retailer chose not to participate in ENERGY STAR Retail Products Platform (ESRPP) citing a need for broader sponsor participation to ensure a stronger financial upside for the company. The team is now talking to another major retailer to determine if they could participate in ESRPP TV incentives without the third retailer for a more limited exchange of data. The team identified several new activities to support the growth of television savings in Cycle 7, including developing a model to assist other utilities in evaluating the TV savings potential for their territories. This model along with a presentation on TV long term TV savings potential will be used to help gain additional sponsorship in the TV category.
Strengthen relationships with key partners to maintain and improve long term program success.	Identify one collaborative marketing sales effort with retailers by Q2 2026 to implement in 2027. Scope opportunity with Pro Channel and develop recommendations by Q3 2026.	Identify one collaborative marketing sales effort with retailers by Q2 2026 to implement in 2027.	On target	Heat pump water heaters were identified as the product category sponsors are most interested in for a collaborative retailer sales effort. The NEEA team is exploring an opportunity to work with Lowe's and A. O. Smith to develop support activities that increase market penetration in Lowe's stores. A qualitative assessment of the opportunity in the Pro Channel has been completed by Cleveland Research and the team is currently reviewing data from one Pro Channel distributor to assess energy savings opportunities.

Consumer Products Product Group

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal
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Water Heating Product Group	Heat Pump Water Heaters (HPWHs)	Emily Rosenbloom	Electric	Influence passage of a federal standard for all electric storage tanks > 45 gallons by 2025.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
	Deepen engagement with local stakeholders to accelerate adoption and impact.	Conduct at least four new collaborations with regional stakeholders to accelerate adoption of HPWH.	Conduct at least two new collaborations with regional stakeholders to accelerate adoption of HPWH.	Heads up	In Q1, the program launched a 12-member utility workgroup, informed by one-on-one interviews, to align priorities and coordinate efforts for the 2029 water heating standard. The kickoff established goals, assessed the current landscape, and prioritized solutions, with Q2 meetings focused on refining these solutions and identifying effective implementation strategies. Additionally, the program partnered with Energy Trust of Oregon to deliver targeted retail training at a Lowe's in Albany, OR, equipping store specialists to address common HPWH questions and support the sales process. Strong interest from additional locations is driving expanded trainings in Q2. The program is on track to meet the threshold of this goal."
	Leverage national engagement to increase extra-regional adoption of HPWHs to ease the transition to the upcoming standard change.	Collaborate with at least three extra-regional partners on an activity to increase the market share of HPWH by Q3 2026.	Collaborate with at least two extra-regional partners on an activity to increase the market share of HPWH by Q4 2026.	On target	In Q1, the program partnered with the Midwest Energy Efficiency Alliance (MEEA) to present lessons learned from installer engagement in the Northwest to their utility workgroup as Midwest programs begin to scale. In Q2, NEEA will collaborate with the Southeast Energy Efficiency Alliance (SEEA) on a similar effort, supporting a regional workgroup of utilities and other key market and supply-chain actors to share best practices for increasing HPWH.
Ensure a broad range of high-performing products are available and well-supported by maintaining and updating product qualification standards, expanding technical resources, and showcasing innovation.	Complete lab testing and award Hot Water Innovation Prize by Q3 2026 Secure commitment from at least two entities to run demonstration projects with the winning product to bring awareness to the innovative solution.	Complete lab testing and award Hot Water Innovation Prize by Q3 2026.	On target	Lab testing is underway and on track to award the prize by Q3. The program has secured two demonstration projects and is actively exploring other potential demonstration project partners. This goal is on track to meet the target by the end of the year.	

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal
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HVAC Product Group	Advanced Heat Pumps	Suzi Asmus	Electric	Develop program to lock in heat pump efficiency that is 30 percent more efficient than current standards via a series of improvements to the federal test procedure and minimum standard, driving transition from all electric heating to VSHP across all applications and optimizing performance with connected controls.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
	Build alignment with priority partners and manufacturers on products, standards, codes, specifications, and metrics that include advanced heat pump improvements.	Conduct targeted outreach to each of the program’s priority partners and manufacturers to achieve strategic alignment, resulting in individualized strategic plans with at least six partners by Q4 2026.	Conduct targeted outreach to each of the program’s priority partners and manufacturers to achieve strategic alignment, resulting in individualized strategic plans with at least three partners by Q4 2026.	On target	In Q1, NEEA engaged ten manufacturers through virtual meetings to build understanding and support for advanced heat pump improvements. Discussions focus on connected commissioning, low load efficiency, minimizing supplemental heat, energy savings modeling, and dual fuel systems. Plans are in place for three on site visits to manufacturers in Q2 to meet with engineers to further build actionable adoption of the improvements.
	Refine improvement specifications and savings rate confidence.	Launch current practice field research and start 3-5 field demonstrations in Q3 2026.	Launch current practice field research and initiate contracting for 3-5 field demonstrations in Q4 2026.	On target	Current practice field research RFP conducted and awarded in Q1. The first field demonstration is underway.
	Effectively communicate value proposition to key market stakeholders and strategic partners.	Develop and deploy 3-5 high value communications pieces (e.g. videos, infographics, case studies, testimonials) by Q4 2026.	Develop and deploy two high value communications pieces by Q4 2026.	On target	Work has begun on the first Advanced Heat Pump program case study. NEEA is collaborating with a heat pump manufacturer and California utility using connected commissioning on demonstration installs and gathering feedback on the installer experience. Additional asset content and timelines are in development.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
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HVAC Product Group	High-Performance HVAC / Very High Efficiency Dedicated Outside Air Systems (VHE DOAS)	Dave Hammond	Electric	Accelerate the adoption of high efficiency HVAC systems and components, and support commercial code advancement that requires the very high efficiency DOAS approach or equivalent efficiency by 2035.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
	Promote system approach and highlight full value proposition (including non-energy benefits) throughout the supply chain.	Conduct at least 10 awareness or educational efforts targeting supply chain audiences.	Conduct at least 7 awareness or educational efforts targeting supply chain audiences.	On target	The High-Performance HVAC program completed 3 presentations in Q1 targeting the following audiences: architecture firms, facility management staff, and an ERV/HRV manufacturer representative. Additional presentations are planned throughout the remainder of the year and the program is on target to exceed 10 by the end of the year.
	Expand program engagement strategy and technical resources to include focus on efficient hydronic heating and cooling systems (e.g. air-to-water heat pumps).	Develop and publish at least five technical resources and/or case studies focused on very high efficiency DOAS and hydronic heating and cooling to BetterBricks.	Develop and publish at least three technical resources and/or case studies focused on very high efficiency DOAS and hydronic heating and cooling to BetterBricks.	On target	In Q1, the program completed a hydronic equipment gap analysis. This included the review of existing program resources and identification of opportunities to improve representation of hydronic heating equipment as an option within the full system design. The program will use this report to prioritize updates to existing program resources and the development of new hydronic-inclusive resources throughout the remainder of 2026 and beyond.
Build support for NEEA's proposed code changes for ASHRAE and IECC.	ASHRAE technical committee accepts new ERV/HRV testing procedure using components of the CSA SP18 testing procedure.	Submit proposed change to ASHRAE committee overseeing ERV/HRV testing procedures using components of the CSA SP18 testing procedure.	Heads up	"The program is anticipating a Q2 completion date of the SP18 testing procedure report, documenting recommended changes to SP18 based on lab testing of the procedure. This report will be a critical component to the ASHRAE proposal and will be available as early as May 2026. Additionally, the program team has been in discussions with key ASHRAE voting members, preparing them for the submission of a new testing procedure standard proposal. Based on recent feedback from these discussions, the program is considering delaying the submission of this proposal until 2027 to ensure the Air Conditioning, Heating & Refrigeration Institute (AHRI) is committed to offering their support. This was flagged as a critical step before receiving approval from ASHRAE. "	

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Efficient Rooftop Units (Efficient RTUs)	Jason Jones	Gas	Increase the efficiency of rooftop units through product differentiation and ultimately an updated federal standard by 2034 that requires at least 20 percent more efficient RTUs than the 2020 market average.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Deepen and expand manufacturer relationships to support and accelerate their product development efforts on efficient RTUs for the light commercial market.	Engage with a minimum of three new, code-level manufacturers (e.g., Trane, Lennox, Carrier, etc.) to develop plans for producing new eligible equipment.	"Achieve one of the following outcomes: Two manufacturers (new or existing) producing new eligible equipment. Two new price points introduced. Two expanded product lines serving the light commercial market."	On target	The team met with manufacturers at the Air-conditioning, Heating, and Refrigeration (AHR) Expo in February. One code-level manufacturer is exploring expanding their options for double-wall (R12+) equipment to include more sizes under 20 tons. The team is working with additional manufacturers and Air-conditioning, Heating, and Refrigeration Institute (AHRI) on the national level through our work with the Consortium for Energy Efficiency (CEE), and other extra-regional partners to align on common efficiency features.
Continue to create and increase partnerships and support for already-qualified efficient RTUs among market actors (manufacturers, manufacturer reps, distributors, contractors) and utilities across the U.S. and Canada.	Recruit six new manufacturers/ distributors/ manufacturer representatives to provide efficient RTU sales data by Q2 2026.	Recruit four new manufacturers/ distributors/ manufacturer representatives to provide sales data by Q4 2026.	On target	The team is continuing to work with the supply chain to provide sales data, has established a plan for getting regular, annual sales data from one manufacturer, and is currently working on agreements for three manufacturer reps and one additional manufacturer. Manufacturer rep data will include qualified and non-qualified equipment.
Build market actor awareness to ensure a clear, cohesive set of value propositions for efficient RTUs throughout the supply chain.	Deliver four high-impact engagements (e.g., in-person trainings or presentations) utilizing four new marketing assets tailored to supply chain groups such as installers, contractors or facility organizations by Q3 2026.	Develop four new marketing assets (e.g., trainings, flyers, case studies, etc.) by Q4 2026.	On target	The marketing team is in final development of a BetterBricks campaign to drive more interest in Commercial HVAC and Efficient RTUs. The outreach team has identified an RTU project with the State of Oregon to create a case study based on the before and after energy use. The team is continuing to work with manufacturer reps to identify opportunities to provide trainings for their customers.

HVAC Product Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Dual-Fuel Residential HVAC	Deborah Sunada	Gas	Build awareness and communicate the value proposition of optimally designed and installed dual fuel systems while supporting the market in developing and specifying the best performing systems, including grid-enabled controls benefits.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Validate dual fuel system product performance and energy savings through demonstration projects.	Complete 2 demonstration projects showcasing dual fuel configuration technology or demand response capabilities with final reports published.	Complete one demonstration project and initiate second demonstration project showcasing dual fuel product performance and energy savings.	Heads up	The program is analyzing field data for 13 homes evaluating a dual-fuel technology, with final report available in Q3 2026. The program is also preparing a second demonstration to be initiated in Q3 2026 with data collected in the 2026-2027 heating season
Understand current market conditions in Residential HVAC and implications/motivators for adoption across the supply chain and consumers.	Complete Market Characterization study and issue final report.	Complete Market Characterization study with initial findings	On target	Contract finalized and project kick off held in Q1. Program is on track to meet target of this goal with final report due in Q4 2026
Identify and refine program barriers, leverage points, and interventions.	Develop preliminary logic model including barriers, leverage points, and interventions using Market Characterization findings.	Develop preliminary logic model.	On target	Preparation for preliminary logic model development will commence in Q2 2026 and updated with Market Characterization findings.
Refine target market, baseline conditions and near-term gas savings	Refine Program Development target market, baseline and validate gas savings over baseline.	Refine Program Development target market and baseline.	On target	Preparation for this goal will commence in Q3 2026 and updated with Market Characterization findings.

HVAC Product Group

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal	
Luminaire Level Lighting Controls (LLLC)	Anne Curran	Electric	Develop best practice specifications for luminaire level lighting controls, aiming to have the technology adopted as standard industry practice.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Strengthen focus and promotion of LLLC by key manufacturer sales channels to motivate more sales professionals to champion LLLC to their customers.	Collaborate on strategic events with 14 manufacturer representatives who have not previously featured LLLC.	Collaborate on strategic events with 10 manufacturer representatives who have not previously featured LLLC.	On target	The program team collaborated with a manufacturer representative to promote LLLC to lighting specifiers at a lighting industry event in Q1. The program has numerous collaborations at planning stage and anticipates that it will have delivered around half of its target by midyear.
Influence leading lighting designers, engineers and installers to include LLLC in their ongoing business practices.	Conduct 10 educational events, with at least four featuring a presentation by a lighting designer, engineer or installer.	Conduct eight educational events, with at least three featuring a presentation by a lighting designer, engineer or installer.	On target	The program team collaborated with Pacific Power to deliver a lighting controls training in Walla Walla, WA and in Yakima, WA in Q1. The program has numerous educational events at planning stage and anticipates that it will deliver around half of its target by midyear.
Increase visibility and demand for LLLC through strategic national engagements to build scale.	Strengthen strategic alignment and collaboration with IES, DLC and ASHRAE.	Strengthen strategic alignment and collaboration with at least two of the three following organizations – IES, DLC or ASHRAE.	On target	In Q1, Chris Wolgamott, Principal Product Manager for LLLC, began a two year term as a member of IES Board of Directors. He also was instated as a member of ASHRAE 90.1 Lighting & Power Subcommittee. Both of these opportunities position the LLLC program well for future alignment and collaboration at a national level.

Lighting Product Group

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Extended Motors Products (XMP)	Warren Fish	Electric	Working midstream with distributors and manufacturers, drive awareness, stocking and sales of highly efficient pumps and circulators, and influence Federal standards over time.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Motivate participating manufacturer representative firms to preferentially stock and increase sales of smart pumps and smart circulators.	Reach market share of 25% for smart pumps and smart circulators, excluding sales in the submersible turbine category.	Reach market share of 20% for smart pumps and smart circulators, excluding sales in the submersible turbine category.	Heads up	In Q1, the program reached 23% penetration for smart pumps and 22% for smart circulators, below target levels, but above threshold levels. The team remains optimistic about achieving the 2026 target of 25% for the full year, even after a slow start, because of the many barrier removal and market education efforts that the program and market partners are working on.
Raise awareness of the value of efficient pump products and increase the use of the ER label in identifying smart pumps.	Complete 15+ high-impact awareness building activities: HI progress toward smart pump registry, smart pump promotion resources, case studies, lunch & learn events, and "Industry Voices" videos.	Complete 10+ high-impact awareness building activities: HI progress toward smart pump registry, smart pump promotion resources, case studies, lunch & learn events, and "Industry Voices" videos.	On target	In Q1, the team tabled at one industry event and completed one smart pump lunch & learn with a mechanical contracting firm. In addition, the Hydraulic Institute's Smart Pump Committee met several times in Q1 to develop foundational elements of the Smart Pump Database project. There is a busy roster of events and activities planned for 2026 and the program is on track to reach the goal target.
Accelerate program participation by growing the number of participating manufacturer representative firms, and by expanding the program scope into additional markets.	Recruit manufacturer representative firms to support and participate in program activities, resulting in a total of at least 12 firms by Q4 2026.	Recruit manufacturer representative firms to support and participate in program activities, resulting in a total of at least 10 firms by Q4 2026.	On target	The program made progress on new rep firm recruitment in Q1 with discussions underway with two new prospects. The team is leveraging manufacturer relationships to gain introductions where possible.

Motors Product Group

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Efficient Fans	Alexis Muench	Electric	Develop program to accelerate the adoption of efficient fans and fan system components.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Complete critical program development activities, finalize the Market Transformation theory and logic model, and gather additional market data to support program advancement to Market Development in 2026.	Finalize Market Transformation theory and key intervention strategies by Q3 2026.	Finalize Market Transformation theory and key intervention strategies by Q4 2026.	On target	The MT theory will be finalized in Q2. Drafting of core program documentation is progressing as planned, ensuring all required components are completed and aligned. Final program development activities are being wrapped up, alongside continued market data collection to support advancement to Market Development in Q3 2026.
Leverage findings from recent market research on specifiers and manufacturer representatives to refine messaging, test market responses, and better understand communication channels that influence purchasing decisions.	Develop 2+ resources by the end of Q3 that further define target audiences and their intervention points based on market research, manufacturer and rep engagement, events, and conversations with industry leaders.	Develop 2+ resources by end of Q4 that further define target audiences and their intervention points based on market research, manufacturer and rep engagement, events, and conversations with industry leaders.	On target	Development of messaging and supporting materials is progressing as planned, incorporating market research insights and early feedback to inform content and support influence on product specification decisions. One asset is already completed with two in development.
"Build on the program's relationship with the Air Movement and Controls Association (AMCA) to strengthen FEI awareness across the market and collaborating on a potential data collection effort involving multiple fan manufacturers."	Finalize a renewed AMCA partnership agreement and execute 3+ strategic initiatives that measurably expand FEI visibility, strengthen industry alignment, and support manufacturer engagement.	Execute strategic collaboration with AMCA through 2 initiatives, including conferences, communications, or joint initiatives that expand FEI visibility.	On target	Engagement with Air Movement and Controls Association (AMCA) is progressing as planned. The team recently presented at the AMCA conference and is finalizing the contract to support increased FEI awareness and collaborative data collection with manufacturers.

Motors Product Group

Commercial and Industrial

Commercial and Industrial				
Initiative Name	Manager	Fuel Type	Initiative Goal	
Advanced Commercial Water Heating	Melissa Mejía	Gas	The program will transform the commercial and multifamily water heating retrofit and new construction market to increase the adoption of gas heat pump (GHP) water heating systems, resulting in reduced gas consumption and carbon emissions in these sectors.	
2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
Validate advanced commercial water heating systems' performance and savings via continued field and lab testing	Complete and share interim field test findings with stakeholders and identify and scope opportunity to validate performance in additional target application.	Complete field test interim report and identify opportunity to validate performance in additional target application	On target	With one field demonstration in progress and another to begin in Q2, the program is on target for this goal. The program is also selecting a lab to test configurations for commercial applications that we have not been able to conduct in the field. For the field demonstration currently in progress, the system has been installed and the site is currently being metered and monitored. An installation at a second demonstration site has been delayed due to unforeseen adjustments with the manufacturer.
Complete the market characterization and integrate learnings into the program's Market Transformation theory and intervention strategy.	Integrate learnings from market characterization and internal synthesis session to update MT Theory and Logic Model.	Complete study and hold internal synthesis session	On target	The Market Characterization for the program is being finalized in Q2, after which the findings will inform the program Market Transformation theory and intervention strategy.
Engage manufacturers and key stakeholders to refine channel development interventions.	Initiate manufacturer and key stakeholder engagement plans by end of Q3.	Finalize manufacturer and key stakeholder engagement plans by end of Q3	On target	This goal is on track for the program. In Q1, the Request for Proposals was published for comprehensive program engagement support, with proposal submissions and awarding taking place in Q2. One of the initial deliverables for this work, set to begin in Q2, will be the development of a Manufacturer Engagement Plan and a Key Stakeholder Engagement Plan.

Water Heating Group

Infrastructure

Initiative Name	Manager	Fuel Type	Initiative Goal
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Infrastructure Programs	BetterBricks	Josh Pelham	Electric	To support the alliance’s commercial and industrial programs by fostering market relationships and providing tools and resources to help raise market awareness and capability for energy-efficient products, services and practices.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 5/12/2026	Comment
	Increase BetterBricks brand awareness and audience reach.	Increase website traffic by 12% year-over-year.	Increase website traffic by 8% year-over-year.	On target	In Q1, the BetterBricks website saw a 6.5% increase in traffic compared to Q1 2025. The team expects a sizable increase in Q2-Q3 when campaigns are running and driving traffic beyond BetterBricks's traditional communications efforts.
Influence commercial building industry perspectives and practices.	Engage in 15 market events, including hosting or cohosting at least two. Publish 12 pieces of original content."	Engage in 10 market events, including hosting or cohosting at least one. Publish eight pieces of original content"	On target	"BetterBricks and NEEA's commercial programs participated in three industry events in Q1, including HVAC and pumps representatives at the AHR expo, a smart pumps exhibit booth at the AEE West conference in Washington in partnership with Building Potential, and a smart pumps and advanced performance DOAS exhibit booth at the ASHRAE Product Show in Las Vegas, NV. An additional 11 events are currently being planned for in Q2. Additionally, 13 new resources were added to betterbricks.com in Q1, including: - One case study featuring whole building upgrades in Portland, OR. - Four BetterBricks Industry Voices, including for advanced performance DOAS, NEEA's Whole Building project, and two luminaire level lighting controls (LLLC) installers. - Eight new guides and handouts, including an LLLC guide and toolkit tailored to installers, four new advanced performance DOAS archetype case studies outlining the business case for upgrading HVAC, and a fact sheet on efficient pumps in hydronic systems."	