

Q2 2026: Tuesday, May 19

9:30am – 3:00pm Pacific

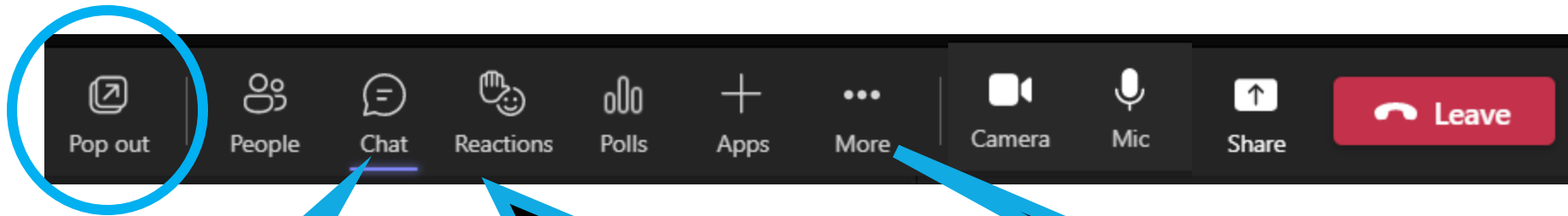
Virtual

Regional Portfolio Advisory Committee





Tools for Today: Engaging on Teams



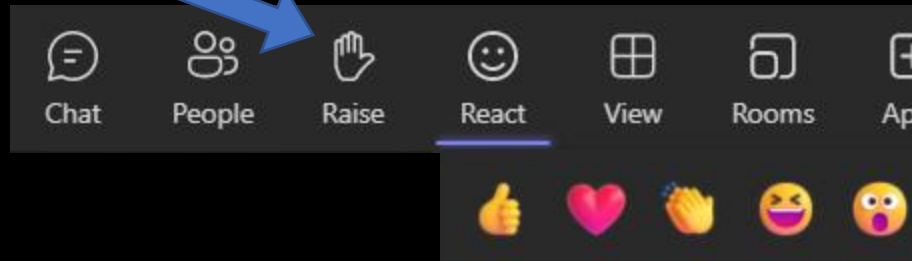
The chat is not captured automatically.

Do you have any accessibility challenges with this technology today?



Comments/Questions?

Please raise your virtual hand or chime in
Chat & reactions also welcome



“...” More includes:

- ✓ Settings: mic & video
- ✓ Background effects

Heads Up!

“Spotlighting” Speakers





Reminder of RPAC Purpose & Role



Purpose

...to support Alliance success by **advising** on the **optimal composition of NEEA's program portfolio**, including a **formal vote for program advancement** at three key points in the Initiative Lifecycle, **consistent with the goals and objectives of NEEA's Business & Operations Plans.**



Responsibilities

- **Portfolio optimization & program advancement (milestone votes)**
- **Coordinate downstream marketing (RPAC+)**
- **Oversee coordinating committees and workgroups**
- **Monitor outcomes of all advisory committees**
- **Advises NEEA's Executive Director on portfolio decisions**

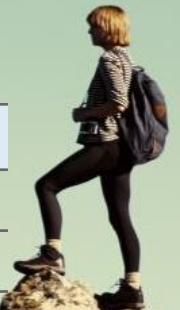
See
Informational
memos



Agenda

All Times Pacific

9:30-9:55	Welcome, Introductions, Agenda / Packet Review
9:55-10:05	Housekeeping & Looking Ahead
10:05-10:35	Annual Electric Portfolio Review: Savings & Risks
10 min	BREAK
10:45-11:45	Program Expansions Overview & Update
45 min	LUNCH
12:30-1:30	RPAC Round Robin <i>Special Request:</i> Any new initiatives or adjustments to programs / plans related to affordability? What's the biggest overlap between your EE efforts and affordability needs?
10 min	BREAK
1:40-2:00	Market Transformation Highlight: Heat Pump Water Heaters Market Progress
2:00-2:20	[RPAC+ ELECTIONS] Proposed 2026 HPWH Marketing Campaign
2:20-2:50	Efficient Fans Program: Refresher & Milestone *Q3 Vote Prep*
2:50-3:00	Wrap-Up & Adjourn



xx?

Introductions

- Name
- Organization
- *And...*



Packet Review & Informational Updates

Tier 1: Agenda Items

- ✓ *Annual Electric Portfolio Review: Savings & Risk (pg. 3)*
- ✓ *Program Expansions Overview & Update (pg. 10)*
- ✓ *MT Highlight: HPWH Market Progress Results (pg. 11)*
- ✓ *HPWH Marketing Campaign (pg. 12)*
- ✓ *Efficient Fans Refresher (pg. 13)*

Tier 2: Informational Updates

- ✓ *UPDATE: Res New Construction – New Homes Protocol (pg. 14)*
- ✓ *UPDATE: HPWH Work Group (pg. 15)*
- ✓ *Q1 / Q2 Electric Committees Highlights (pg. 16)*
- ✓ *UPDATE: Specially-Funded Projects (pg. 18)*
- ✓ *Q1 2026 Market Progress Report: Gas + Electric Programs – Progress toward annual goals (pg. 20)*

Tier 3: Additional Resources

- ✓ *Functional newsletters and committee materials on [neea.org](https://www.neea.org) (pg. 2)*



Housekeeping & Looking Ahead

Housekeeping

➤ Updates

✓ Check in on Info Memos

- New Homes Protocol Measure
- HPWH Work Group
- Electric Committee Highlights
- Specially-Funded Projects
- Market Progress Report

➤ Announcements & Reminders

- ✓ Program & Market Research
- ✓ 2026 NEEA Meetings
- ✓ Other regional / industry events







Program & Market Research Reminders



Upcoming 2026 NEEA Meetings

Wednesday May 27	C&I Coordinating Committee
Tuesday June 2	Natural Gas Advisory Committee
Tuesday June 16	Residential Coordinating Committee
Wednesday June 17	Regional Emerging Tech Advisory Committee
Mon-Tues June 22-23	Board Meeting (Helena, MT)
Wednesday August 26	Cost Effectiveness & Eval. Advisory Cmtee

2026 RPAC Meeting Dates

Quarter	Day(s)	Date(s)	Format
Q1	Tuesday	Feb 10	Hybrid @ NEEA or utility 
Q2	Tuesday	May 19	Virtual
Q3	Tuesday	Sept 1	Virtual
Q4	Tuesday Monday	Nov 3 Nov 2	Hybrid (TBD) @ NEEA or utility 

**** Propose shifting to Monday Nov 2 ****
Any concerns / flags with this adjustment?

 = Proposed Hybrid / In-person Option

➤ *Other regional / industry events or announcements?*



[Check out the EFX26 photo highlights here!](#)

Lisa Grow

CEO & Pres., Idaho Power

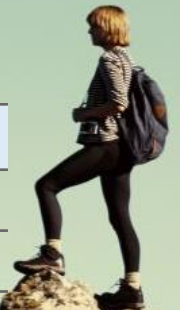
EFX 2026, Boise



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Annual Portfolio Review: Savings, Risks and Opportunities

Stephanie Rider

Director, Portfolio Management, Data Strategy and External Reporting

Mike Smith

Sr. Manager, Emerging Technology



Electric Portfolio Summary

- Solid and mature portfolio
- Consistent progress in Market Transformation goals and corresponding adoption levels in market
- Known headwinds with significant outcomes
 - 25% of our portfolio's cycle (2025-2029) energy savings value was expected from new product standards and new building codes. Now down to 5% (down 65%)
- Remaining 75% is on solid footing. Continue to see increasing adoption trends, a lagging indicator to our efforts influencing the supply chain and advancing markets towards a transformed state
- Developing and executing a *leveraged growth* strategy to address the headwinds



Leveraged Growth Strategy

Serves many needs:

- Address short term portfolio risks due to external environment
- Need to build for more immediate grid resiliency
- Leverages our internal and external resources

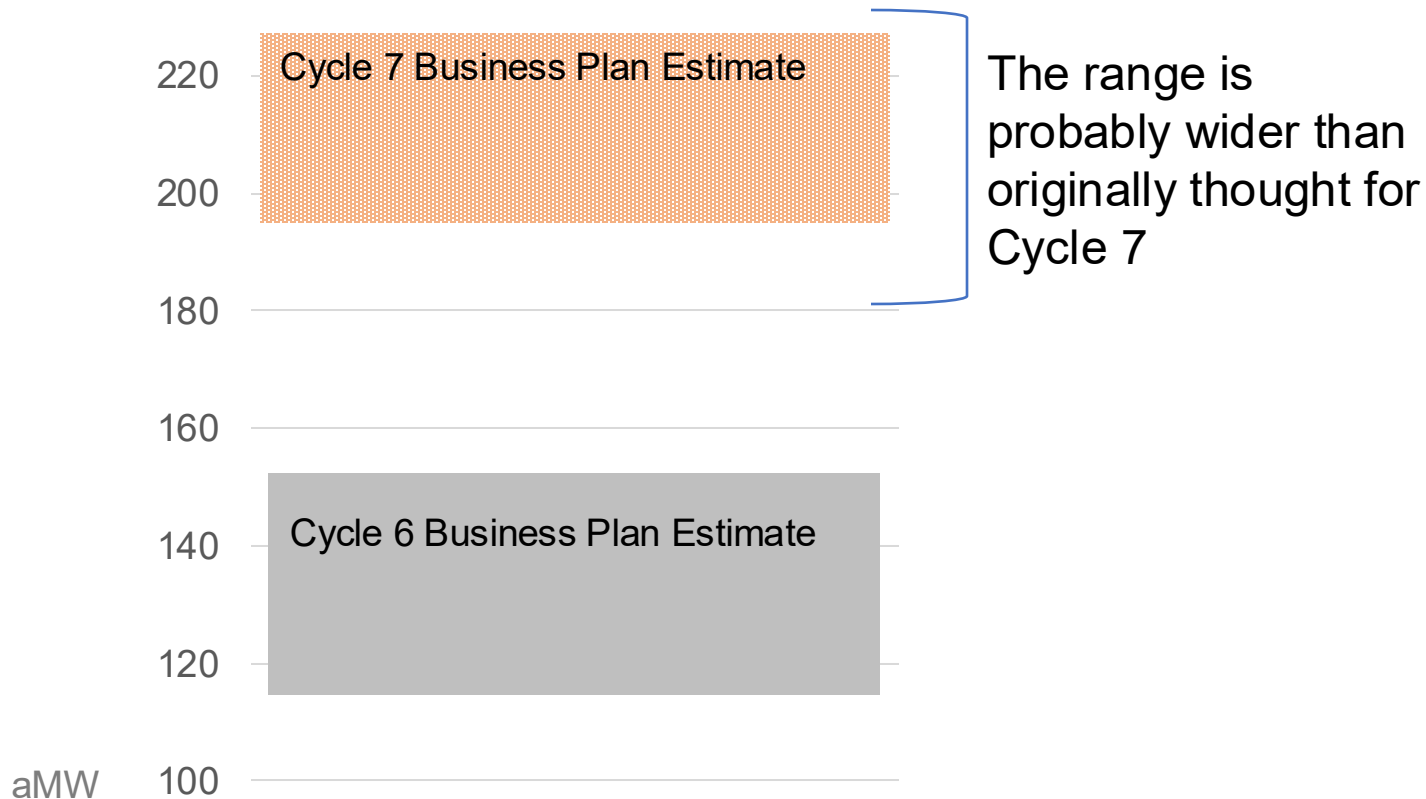
Our portfolio strategy has been one of Leverage

- Mature portfolio in this cycle. Years of work across markets, strong relationships, intel and knowledge base
- Across breadth of product groups: Residential and Commercial space and water heating, Consumer products, Motor driven systems
- Capitalizing on this to look more deeply at product extensions, market extensions, tools and strategies to activate markets more quickly
- These areas support both expedient access to additional energy savings and high peak reduction benefits



Energy Savings Expectations (2025-2029)

Co-Created Savings from All Investments



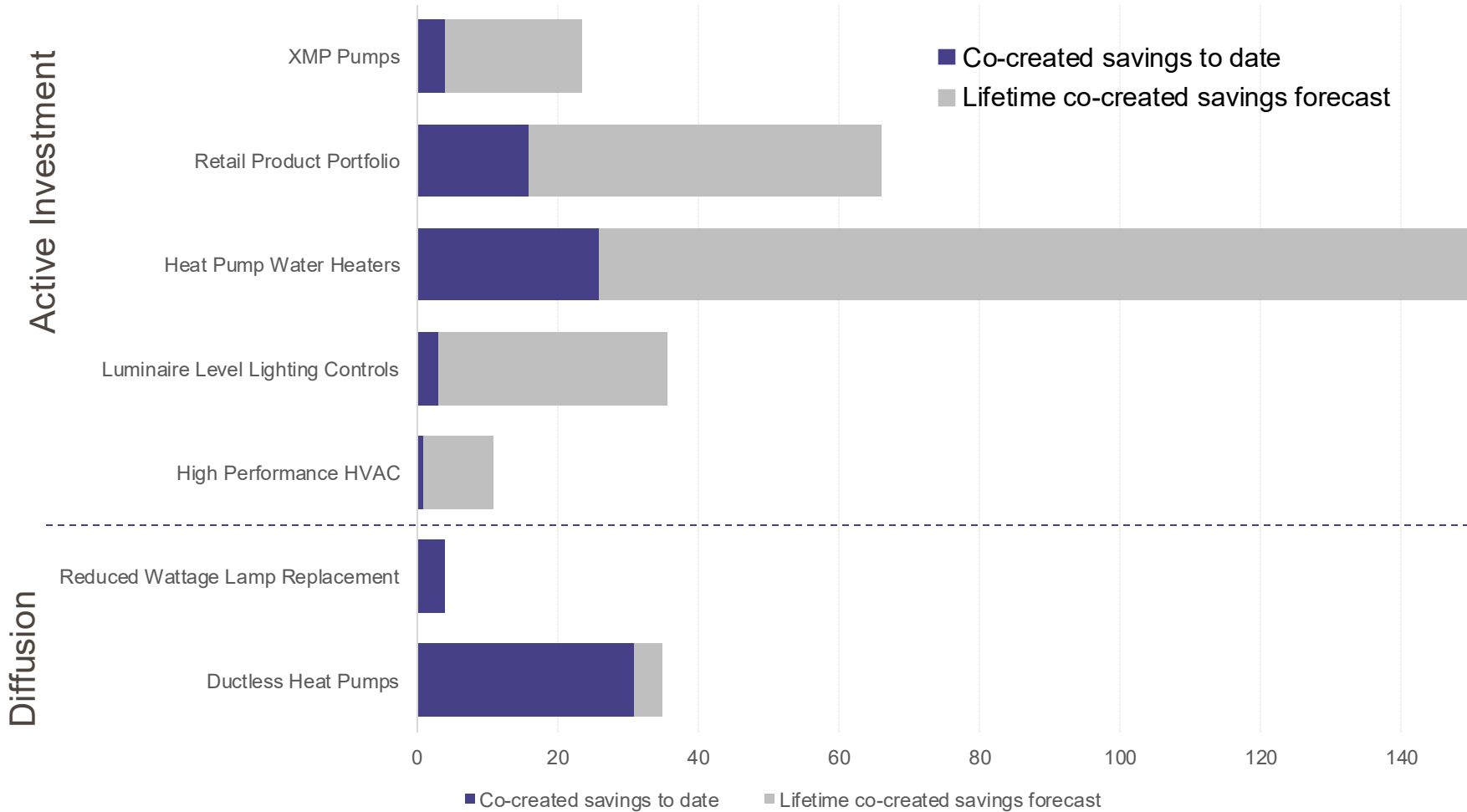
How much will our leveraged growth strategy offset the policy factors that are delaying opportunities in product standards and new building codes?

First reforecast of expectations coming later this year



Long term view: Majority of potential is still ahead

Progress Toward Program Potential

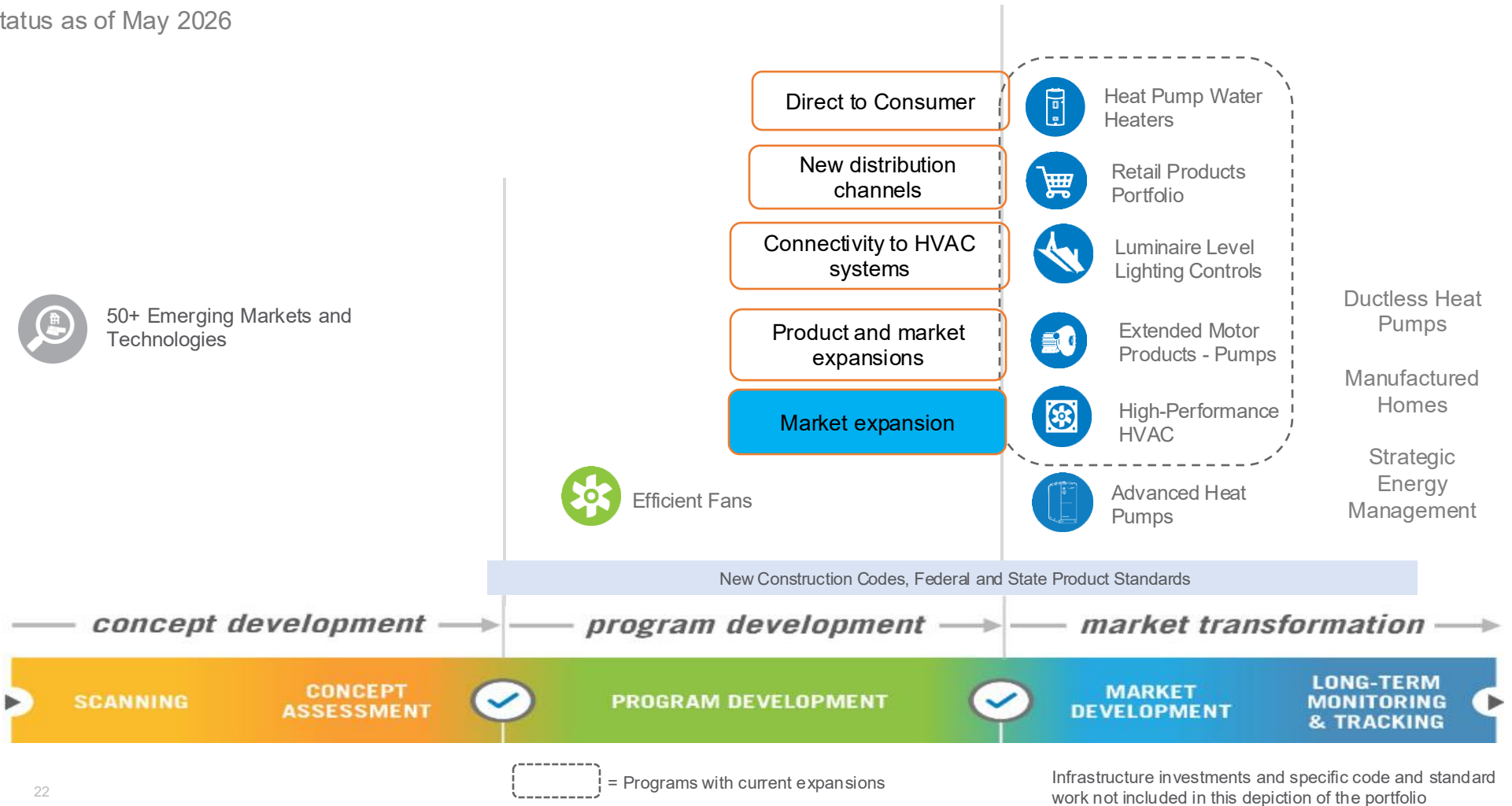


- >400 aMW of total lifetime co-created savings forecasted
- 86 aMW savings achieved to date (<17%)
- **Another +300 aMW of additional technical potential in early development stages**



Electric Portfolio Current Composition

Status as of May 2026





What can this Committee expect?

- Today:
 - Reviewing 3 emerging program expansion opportunities
 - Teeing up emerging technology opportunities for new program development
 - Discussing the expansion of the electric High Performance HVAC program to include Natural Gas opportunities
- Q3/Q4:
 - Discussing the expansion of the electric Luminaire Level Lighting Controls (LLLC) program to include HVAC controls and a fuel-neutral focus
 - Providing visibility to the official Cycle 7 energy savings reforecast

Portfolio Opportunities

LLC with HVAC Controls

- Leveraging the embedded sensors of this lighting control technology for further savings with HVAC systems.
- Exploring opportunities with manufacturers for use with load flex.
- Current focus on in region partnerships for field testing



Portfolio Opportunities

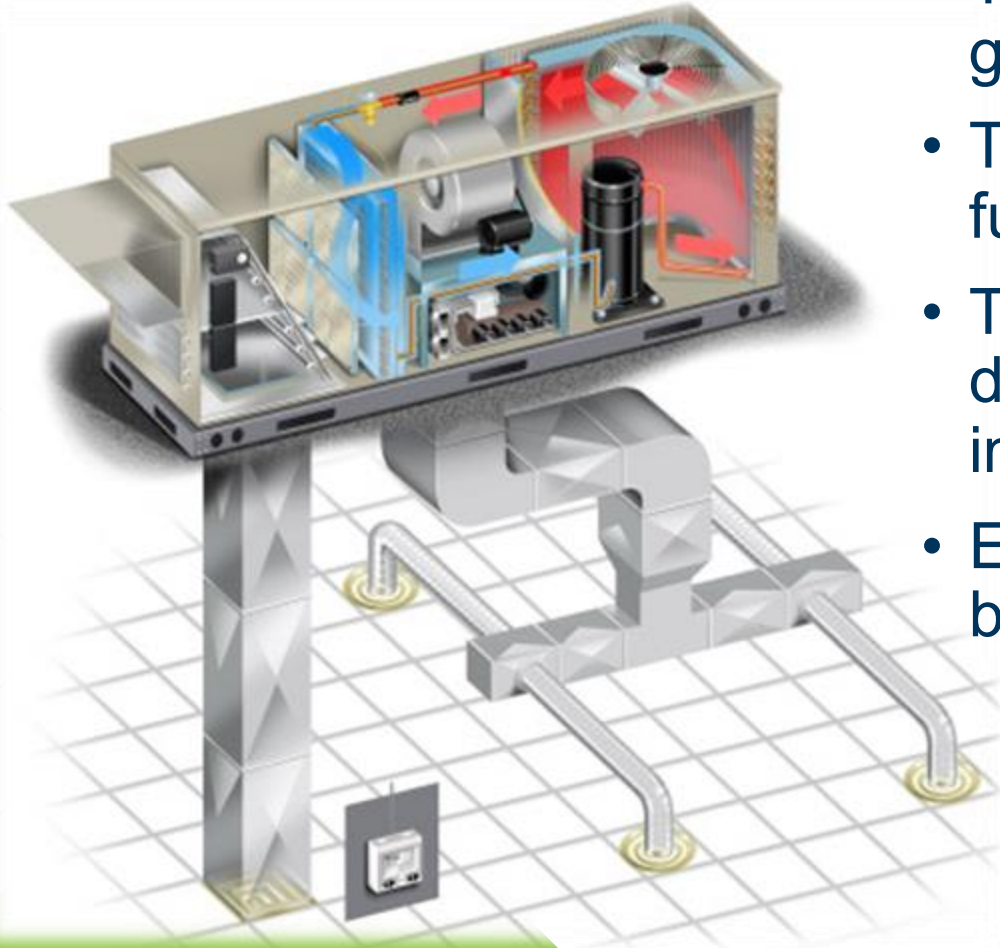
Commercial Heat Pump Water Heaters

- NEEA has been developing this product for a while, but savings were too small for a stand-alone program
- Thermal storage presents large load flex potential
- The gas and dual fuel systems in ACWH engage the same market actors



Portfolio Opportunities

Electric & Dual Fuel Rooftop Units (RTUs)

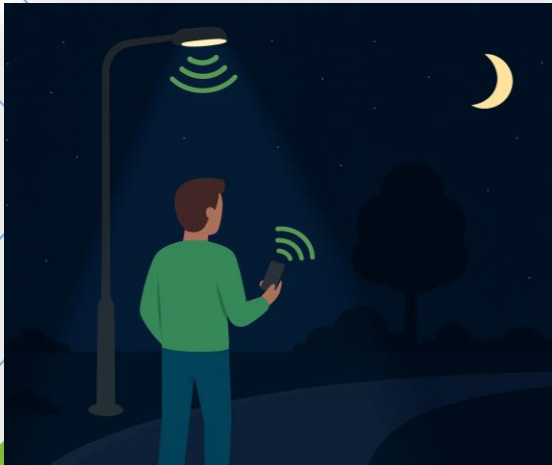


- The current Efficient RTU program focuses on gas savings
- There is a growing number of electric and dual fuel RTU products entering the market
- These products present the same opportunity to deliver electric savings through system improvements with the shell and dampers
- Exploring how an expanded program might be better positioned to engage with the market

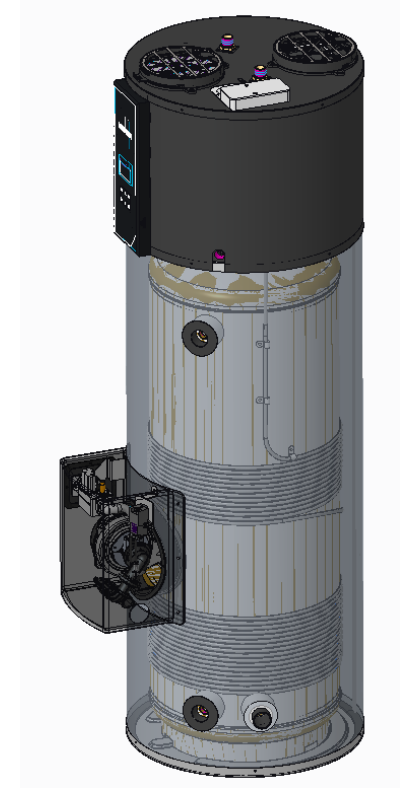
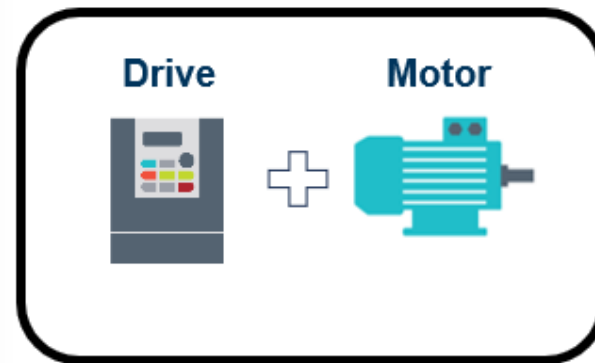
Potential Future Opportunities



- Commercial Displays and Monitors
- Exterior LLLC
- Motor Driven Systems (Drives)
- Room Heat Pumps
- Dual Fuel Residential Water Heating



PDS = ASD + Motor



Thank You!

Stephanie Rider

Director, Portfolio Management, Data Strategy and External Reporting

srider@neea.org

Mike Smith

Sr. Manager, Emerging Technology

msmith@neea.org

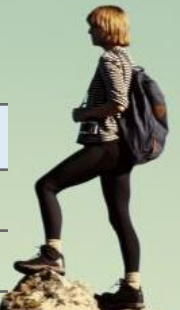


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Program Expansions Overview and Update

Emily Moore

Director Market Strategy & Execution

Dave Hammond

Senior Program Manager, Commercial HVAC





NEEA's Initiative Life Cycle (ILC)





Two Program Expansion Scenarios

- **Program Change**

- Pivot in strategy or revised product definition
- Remains electric or gas funded only
- Socialized with funding advisory committee

Example: Exterior LLLC

- **Advancement into New Portfolio**

- Change in scope to include other fuel type benefits
- Is a new program opportunity, or advancement, for a portfolio
- Co-funding potential creates leverage opportunity for both portfolios

Example: Gas HE DOAS



Program Expansion Definition

- 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



Decision Criteria for a Program Expansion

- The opportunity is an enhancement, extension, or closely associated component of an existing program
- NEEA has strong existing market knowledge (market actors and supply chain, barriers, product performance and risks)
- Programmatic synergy is high and the existing program can adapt its strategy to include the new opportunity
- Incremental risk and resourcing needs are modest relative to a new program
- Speed and agility materially improve the regional value delivery



ILC Expectations for Program Expansions

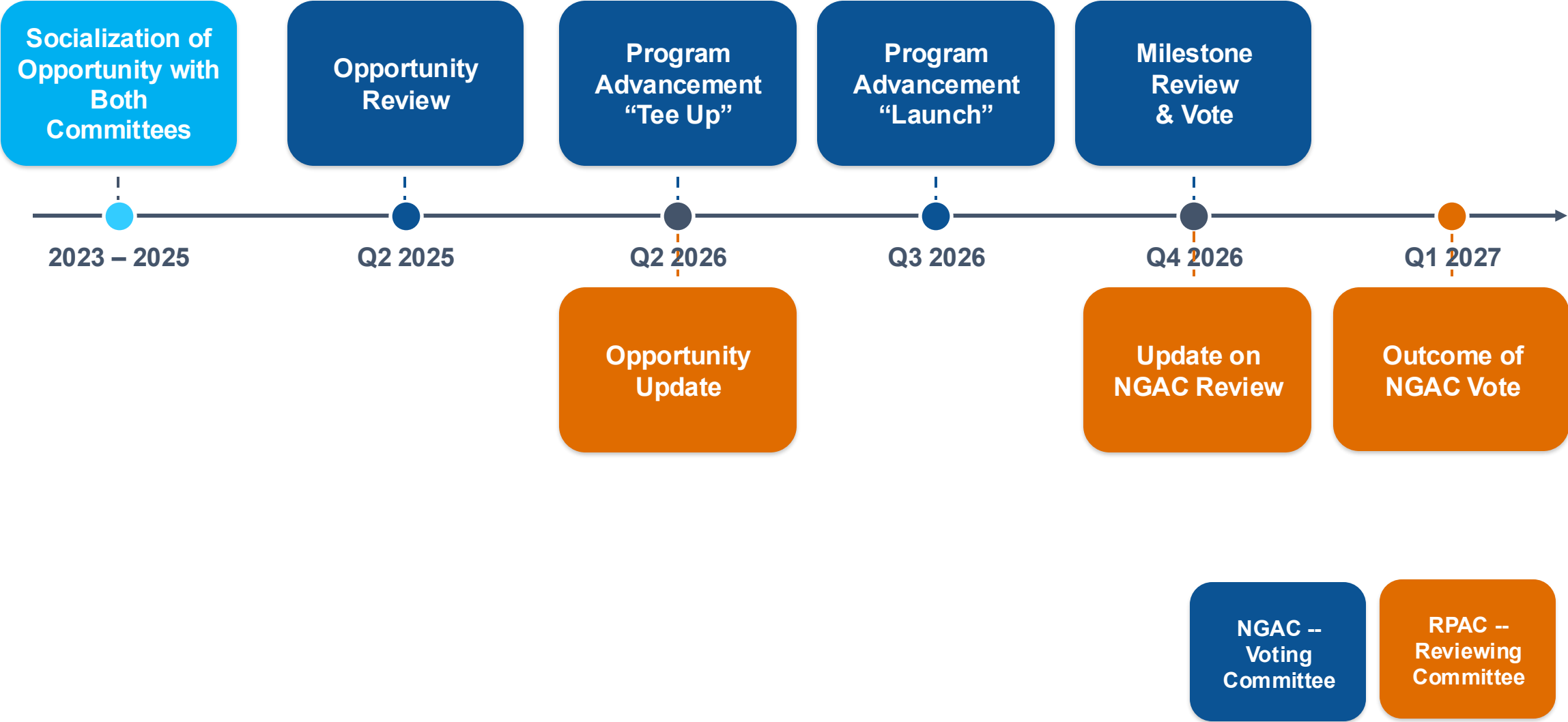
- Program expansions will follow an expedited ILC path
- Same stakeholder engagement principles apply:
 - Transparency, opportunity for feedback, consensus building, alignment on the regional investment
- Standard ILC requirements and decision-making apply prior to advancement of a program expansion to Market Development *in another portfolio*



Current Opportunity

- **Expand electric Advanced Performance DOAS program to include gas high-efficiency DOAS**
 - Delivers electric and natural gas portfolio benefits, enhancing the overall MT outcomes
 - Will be a Program Advancement in the gas portfolio, voted on by NGAC in Q4 2026
 - RPAC will be kept informed in parallel to ensure understanding and alignment of program changes and dual-fuel funding approach

Stakeholder Engagement Touchpoints and Timeline — Gas HE DOAS



Advanced Performance DOAS: Program Expansion Update

Agenda

Advanced Performance DOAS Overview:

- System Review
- Progress Highlights
- Looking Ahead

Gas Expansion:

- System Review
- Gas & Electric Comparison
- Gas Activities to Date
- Benefits to Electric Portfolio

Next Steps

Program Expansion Opportunity Update

Advanced
Performance
DOAS to include
Gas HE DOAS

Program MT Goal:

Advanced Performance DOAS or equivalent energy efficiency required by code throughout Northwest



Build awareness and acceptance across key commercial market actors



Drive market adoption, leverage completed projects as examples of success



Develop and submit code proposal(s) based on market support and project M&V results



Advanced Performance DOAS Overview

1

Fully decoupled ventilation from heating and cooling

2

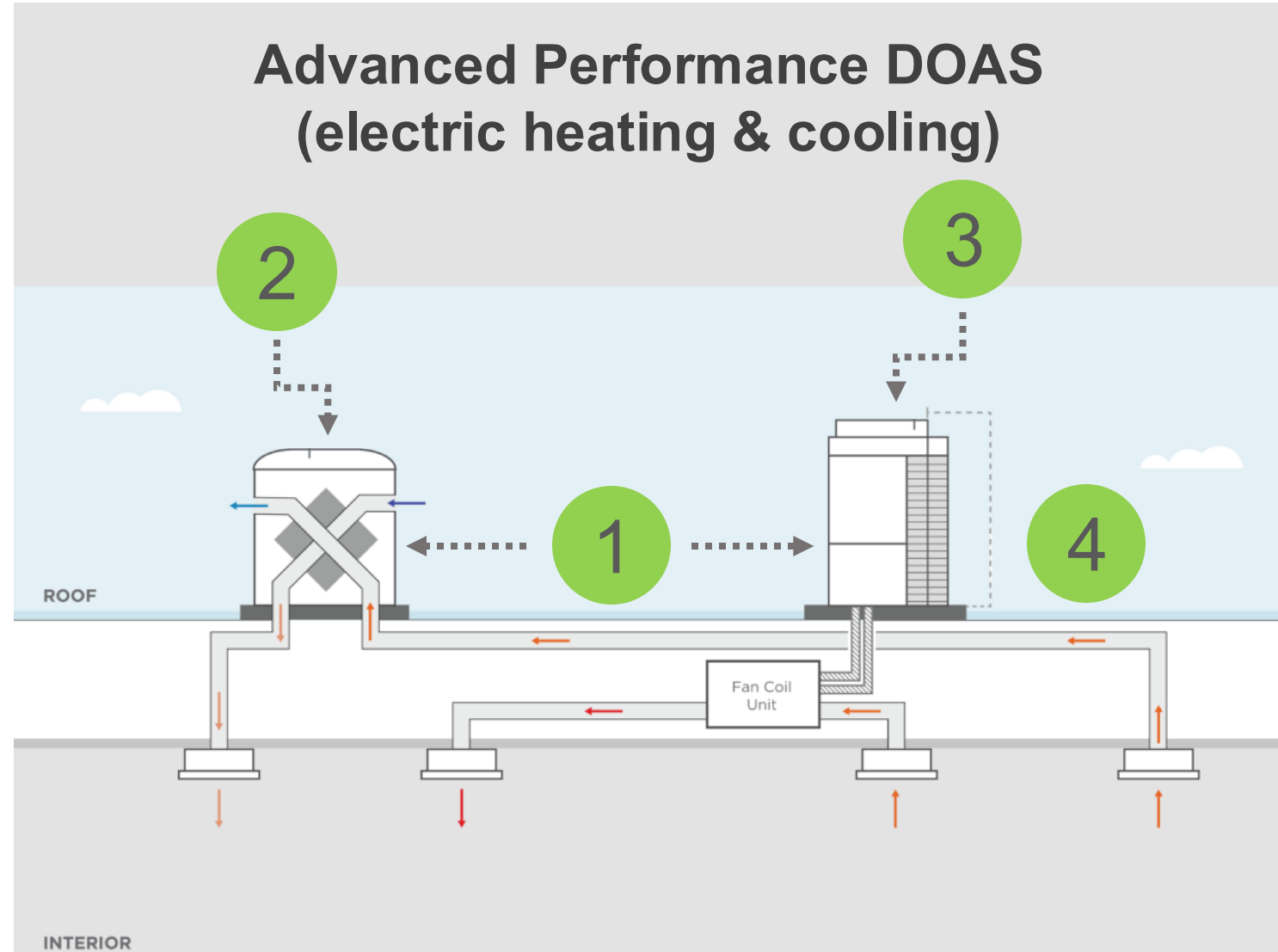
High efficiency heat/energy recovery ventilator with $\geq 82\%$ sensible effectiveness

3

High performance electric heat pump system

4

Right-sized heating and cooling system



Advanced Performance DOAS

Progress Highlights

Increase in compliant ERV/HRV products

Program launch:
1 manufacturer / 3-5
models
Today:
9 manufacturers / 173
models

Trainings and presentations regularly occurring throughout NW targeting...

- Engineers / architects
- Owners / facility
management staff
- ESCOs

**WSEC partial adoption of
AP DOAS system design
(WSEC 2021)**

**(5) Manufacturer reps
actively promoting AP
DOAS across NW**

**New ERV/HRV testing
procedure accepted by
CSA Group**

Advanced Performance DOAS

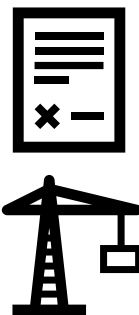
Looking Ahead



Increased focus on hydronic (air-to-water) heat pump systems



Communicating full benefits of AP approach to broader audience: building owners / facility management staff / property management groups



ASHRAE adoption of AP DOAS-related testing procedures and performance standards



Advanced Performance DOAS – Gas Expansion Overview

1

Fully decoupled ventilation from heating and cooling

2

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

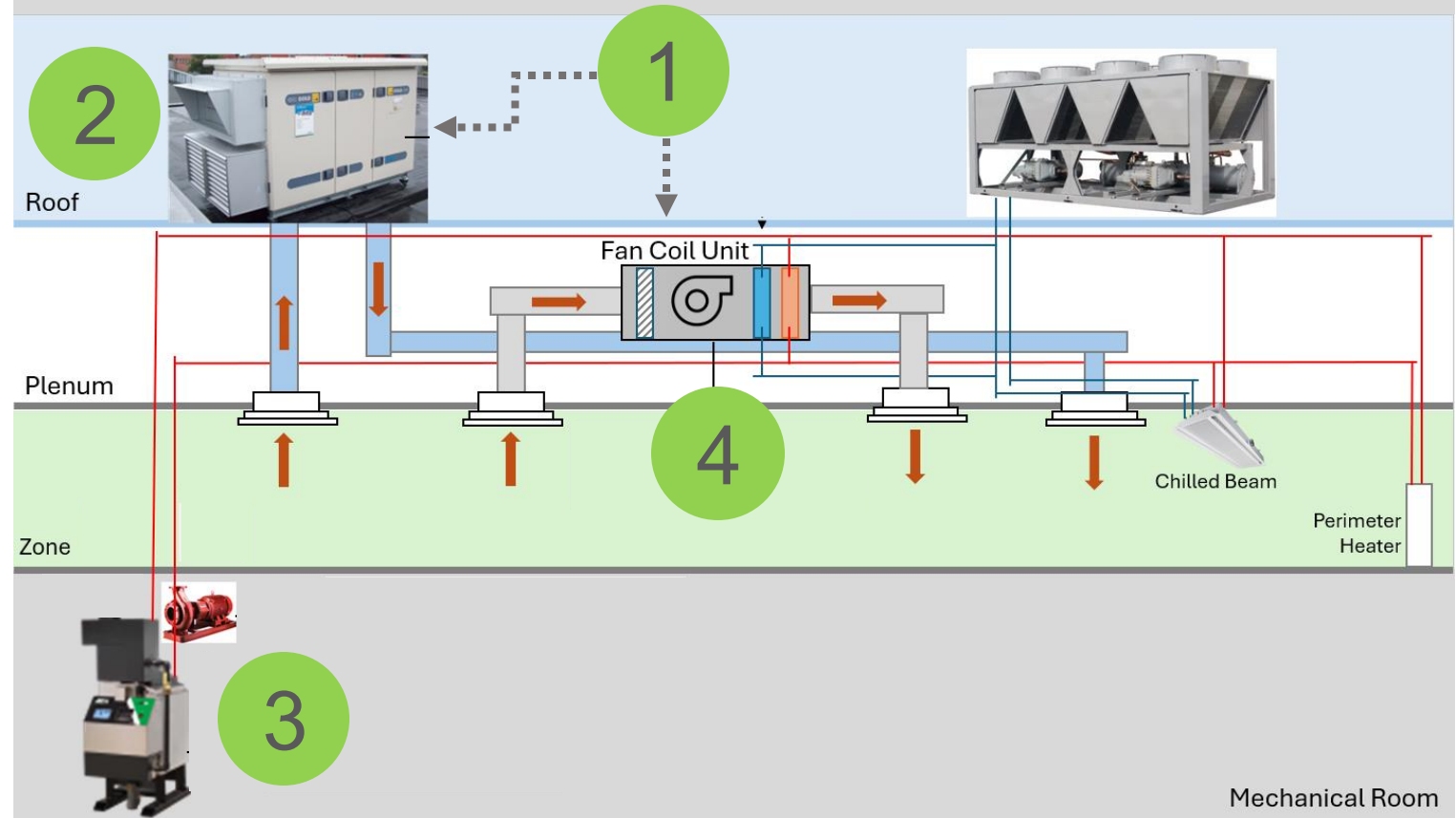
3

Condensing boiler (right-sized) + efficient pump control

4

Efficient terminal equipment

Gas Version of Advanced Performance DOAS



Advanced Performance DOAS – Gas & Electric Comparison

Gas

- Well suited for medium-to-large buildings
- Focused specifically on condensing boilers
- Trusted to address cold climate needs/concerns

Gas & Electric

- Aligned on 3 of the 4 key system components
- Applies to equipment upgrades, renovations and new construction
- Leverages relationships with the same market actors, E/HRV manufacturers and reps
- Air-to-water HP & condensing boiler design practices share many of the same components (lower water temp, efficient pumps, etc.)
- E/HRV focused codes & standards activities applies to both fuel types

Electric

- Suitable for all sizes of commercial buildings
- Can include a range of elec. heating system types (VFR, Air-to-water HPs, geothermal, etc.)

Advanced Performance DOAS – Gas Expansion

*Expansion-focused
activities to-date*

Energy
modeling study

Specifier market
research study

Codes impact
assessment

Market potential
/ savings
analysis

Cost
effectiveness
analysis
(ongoing)

Field Study –
Gas AP DOAS
M&V (ongoing)

Advanced Performance DOAS – Gas Expansion

Key Benefits to Electric Portfolio

- ✓ Eliminates unnatural distinction of fuel types, making system less of a “niche” approach
- ✓ Broadens appeal and relatability to key market actors working across dynamic environments
- ✓ Additional funding source will result in increased program activities at a lower cost to electric portfolio

Advanced Performance DOAS – Gas Expansion

Next Steps

- Completion of incremental cost study
- Analysis of field study M&V results
- Determine Electric & Gas Funding Allocation
- Finalize Program Advancement documentation in prep for NGAC vote

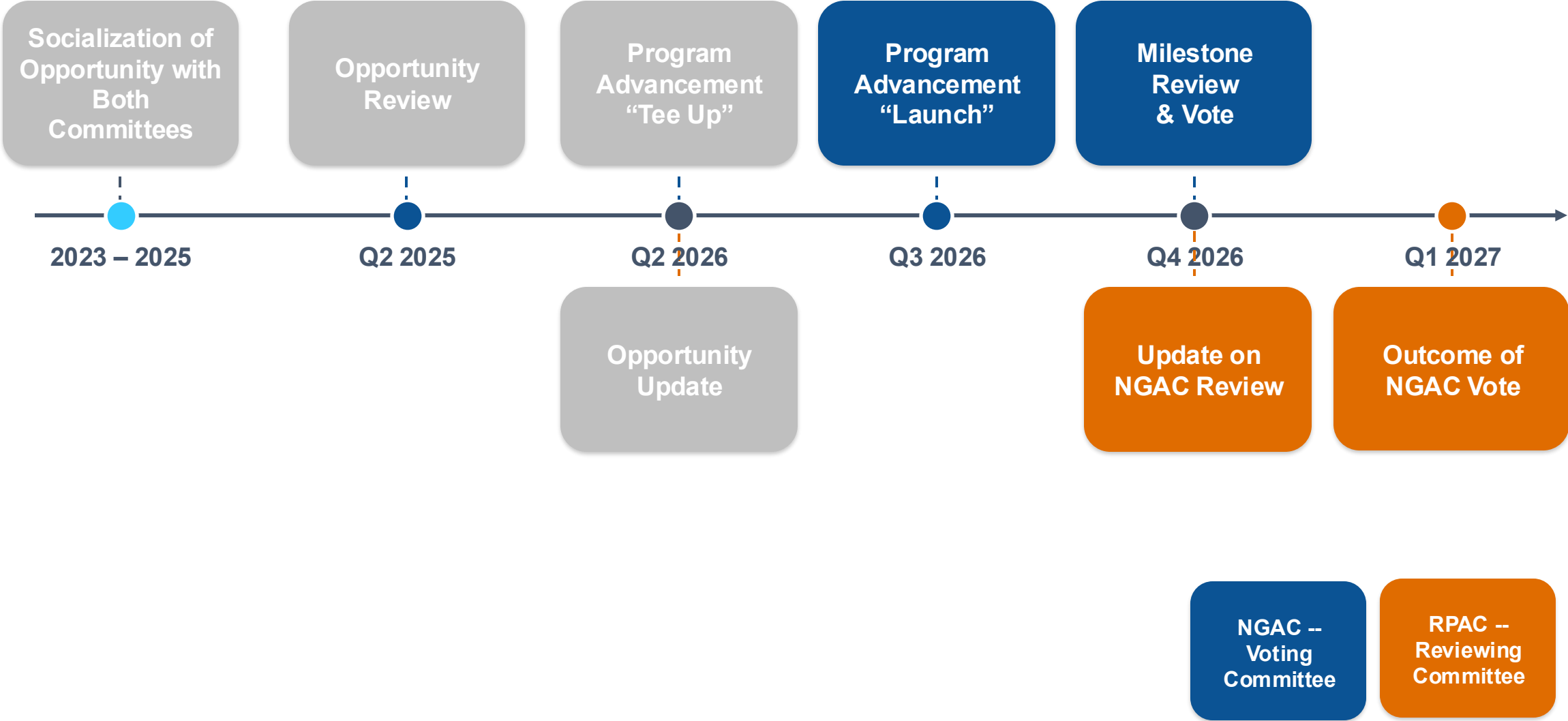
Thank you!

What questions or feedback do you have about the Advanced Performance DOAS program expansion?

Dave Hammond
Sr Program Manager
DHammond@neea.org



Stakeholder Engagement Touchpoints and Timeline — Gas HE DOAS





Program Expansion Approach and Process

- What questions or feedback do you have about the approach and process?
- Do you support the proposed approach and process?

Thank You!

Emily Moore

Director, Market Strategy & Execution

emoore@neea.org

Dave Hammond

Sr. Program Manager, Commercial HVAC

dhammond@neea.org



Lunch

*Please return by
12:30pm Pacific*

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2:50-3:00	Wrap-Up & Adjourn



⇒ *Round Robin Updates*

Focus: Organizational & program highlights

- Big changes (programs/personnel)
- Current challenges, lessons learned
- How utility activities relate to NEEA's
- Sharable tools/materials
- Equity, hard-to-reach markets
- Findings, filings, IRPs

Special Request:

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- What's the biggest overlap between your EE efforts and affordability needs?

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Market Transformation Highlight: Heat Pump Water Heater 8th Market Progress Evaluation Report

Emily Rosenbloom

Manager, Program Management & HPWH Program Lead





The Rationale for MPERs

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





MPER #8 Research Methods

Installer survey (*n*=101)

HPWH purchaser survey (*n*=451)

General consumer survey (*n*=810)

Installer Survey (2025)

State	Urban	Rural	Total
Washington	47	5	52
Oregon	27	5	32
Idaho	18	5	23
Montana	5	6	11
Overall	81	20	101



MPER #8 Research Methods

Installer survey (*n=101*)

HPWH purchaser survey (*n=451*)

General consumer survey (*n=810*)

Purchaser Survey (2025)

State	Purchasers
Washington	322
Oregon	53
Idaho	64
Montana	12
Total	451



MPER #8 Research Methods

Installer survey (*n=101*)

HPWH purchaser survey (*n=451*)

General consumer survey (*n=810*)

Consumer Survey (2025)

State	Urban	Rural	Total
Washington	329	59	388
Oregon	161	61	222
Idaho	61	60	121
Montana	19	60	79
Overall	570	240	810



Main Takeaways

- Market share continues to grow
- Purchasers are satisfied and likely to recommend the product
- Installer awareness is near universal (99%), but installers recommendations rates remain modest
- Fewer installation challenges are being reported

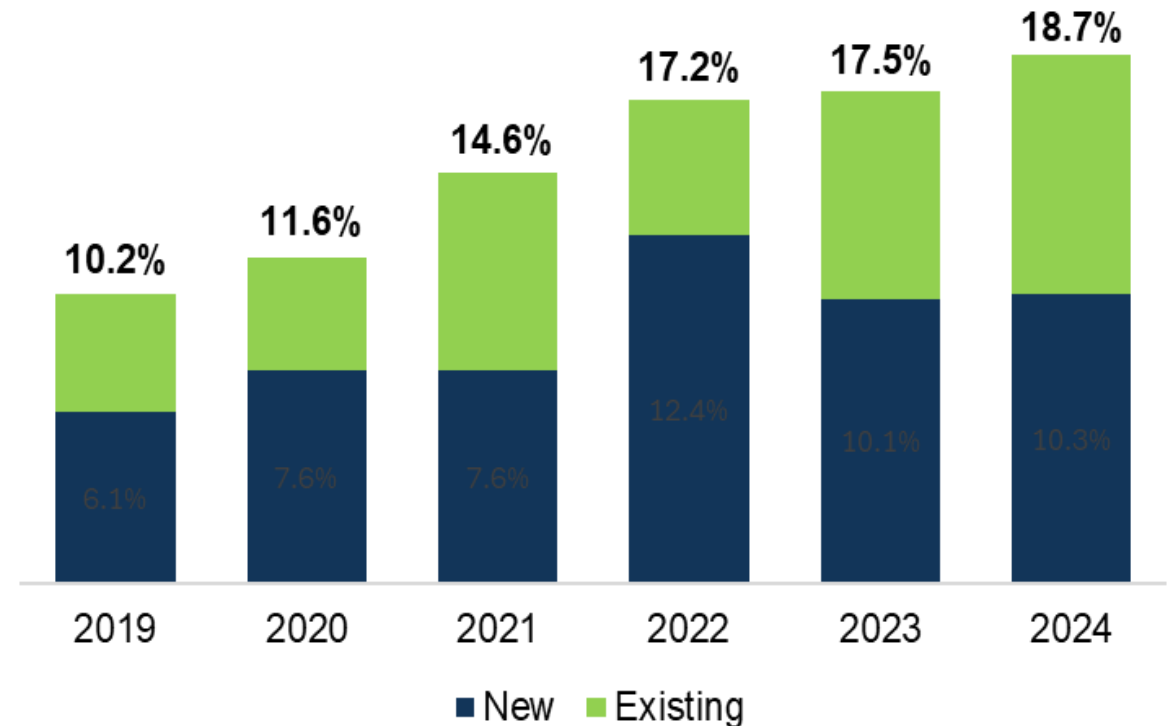




Market Share Gains Continue

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

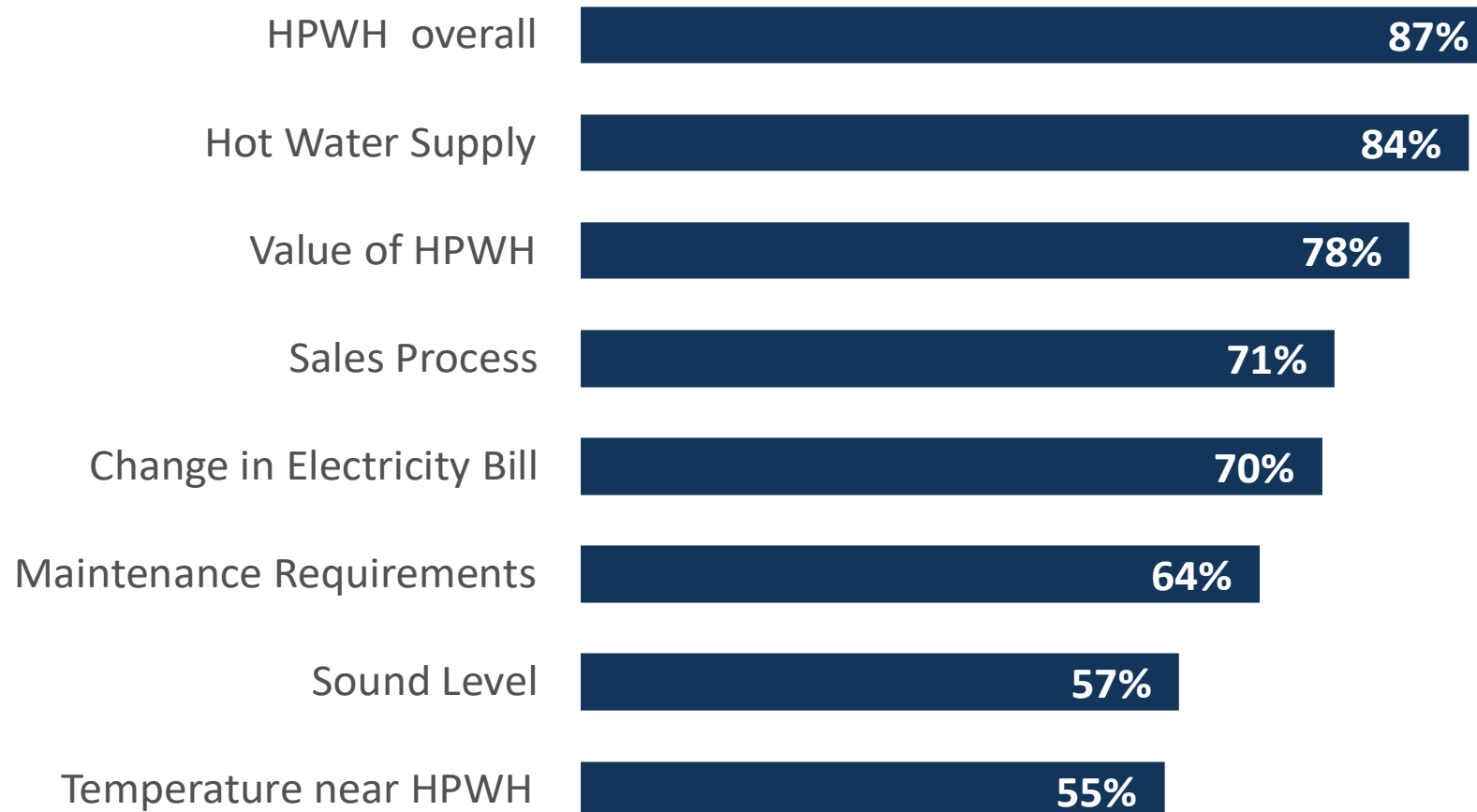
Northwest HPWH Market Share





High Customer Satisfaction

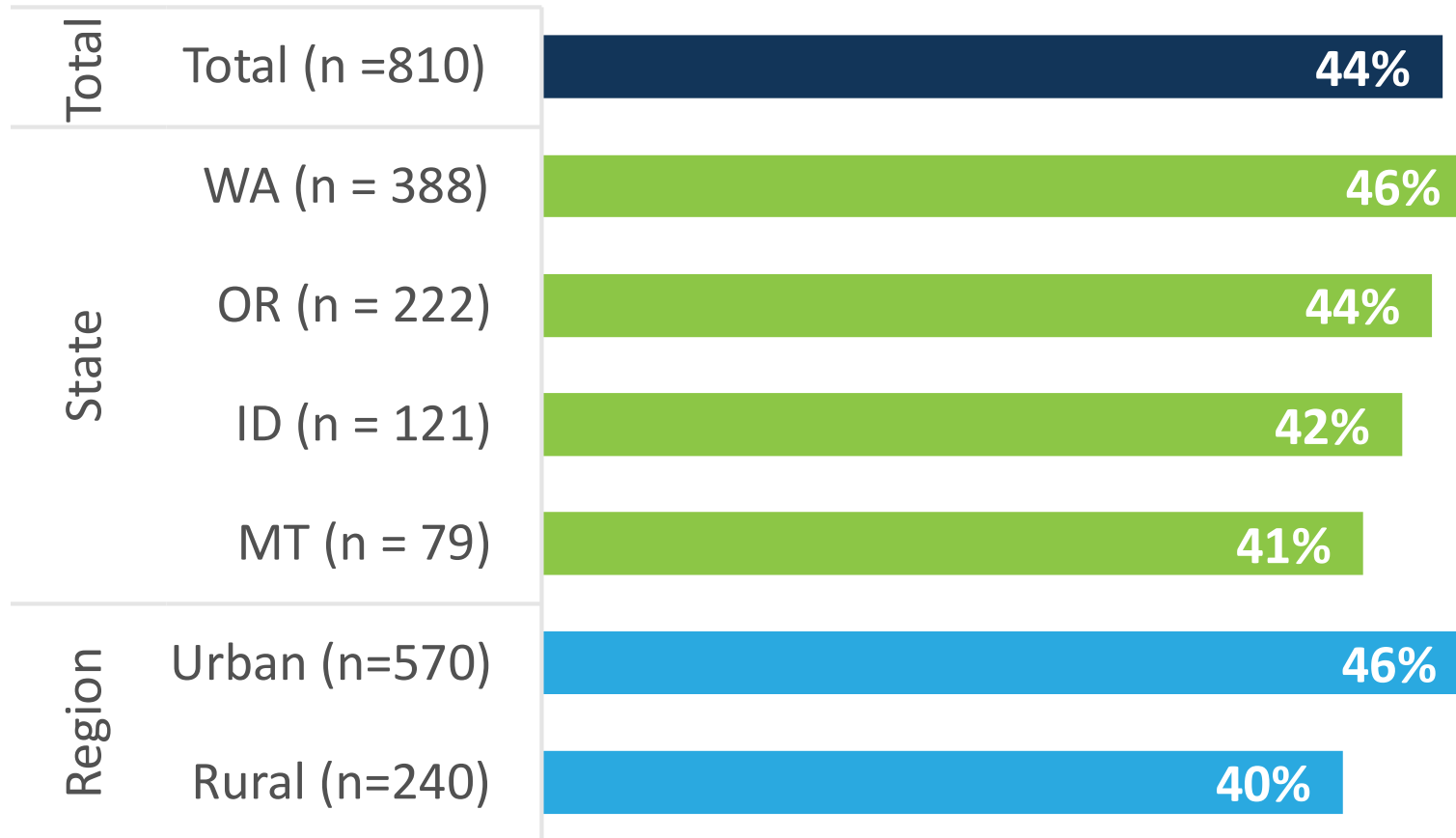
Satisfaction with HPWH (Purchaser Survey n=449)





Consumer Awareness is Established

HPWH Awareness
(Consumer Survey n=810)

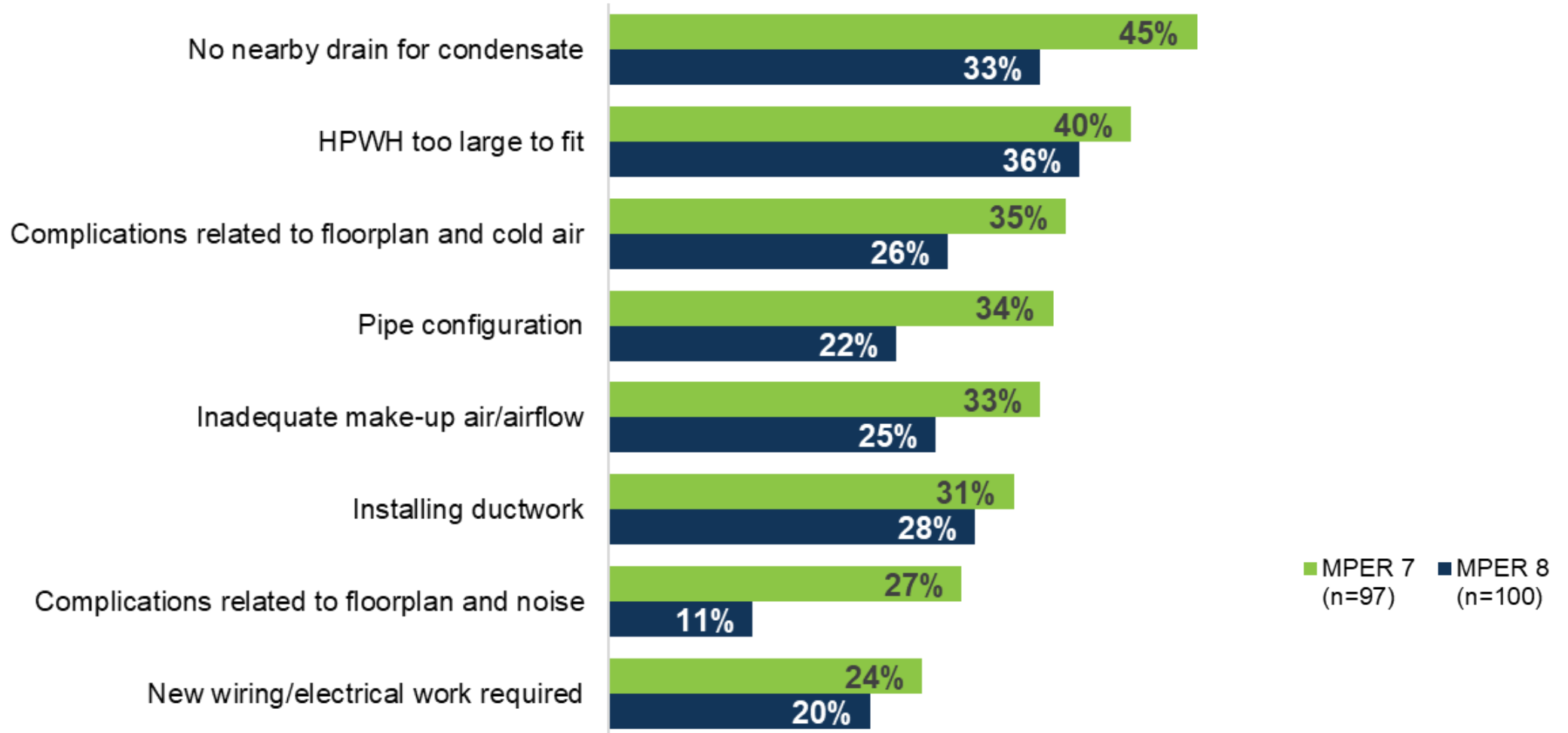




Installation challenges less prevalent than prior MPER

Installation Challenges

(Installer Survey n=100)





Modest Installer Recommendation Rates

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

Thank you!

Emily Rosenbloom

Manager, Program Management &
HPWH Program Lead

erosenbloom@neea.org



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RPAC and RPAC+ NEEA Marketing Elections

Process Refresher

Alisyn Maggiora, Sr. Stakeholder Relations Manager



RPAC+ Elections Options

- **PARTICIPATE**: Funding utility* supports NEEA conducting the planned marketing activity in its service territory
- **SELF-DELIVER**: Funding utility opts to deliver the planned marketing activity in its service territory, in coordination with NEEA timing and activities
- **EXEMPTION**: Funding utility does not support the planned marketing activity being conducted in its service territory



*Utility includes BPA & Energy Trust

➤ [“RPAC+” details in Charter](#)



RPAAC+ Elections Process: Roll Call @ End

2026 HPWH Consumer Marketing Campaign			
	Participate ✓	Self-Deliver ✓	Exempt ✓
Avista			
BPA			
Chelan PUD			
Clark PUD			
Energy Trust (incl PGE)			
Idaho Power			
NorthWestern Energy			
Pacific Power			
Puget Sound Energy			
Seattle City Light			
Snohomish PUD			
Tacoma Power			

Note: some utilities cast their election in advance due to availability; those will be indicated in the roll call slide at the end



Proposed 2026 HPWH Consumer Marketing Campaign

Britt Cutsforth Dawkins

Senior Manager, Marketing Strategy





Campaign strategies

- Continue increasing Northwest awareness
 - Build on the existing regional consumer awareness* and act on MPER recommendations to increase HPWH awareness in areas with historically lower awareness and adoption rates
- Continue building consideration
 - Ensure Northwest consumers with some level of existing awareness of HPWHs gain an increased understanding of the HPWH value proposition, to drive interest in—and ultimately, demand for—HPWHs
- Ensure regional alignment
 - Connect with funders as requested before the campaign and collaborate with mid- and upstream market actors during the campaign

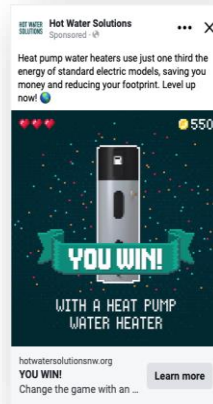
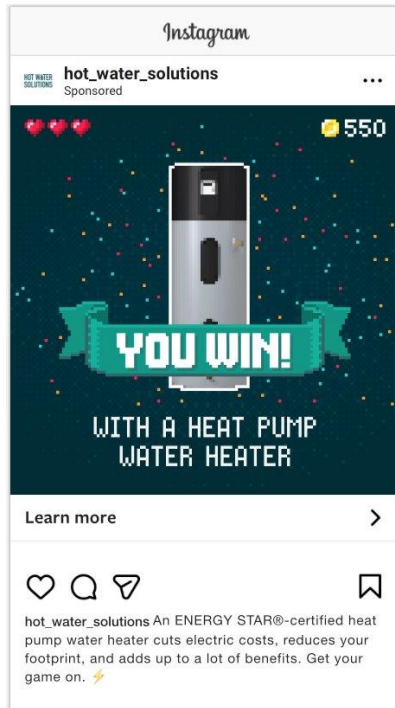


2026 Campaign Overview

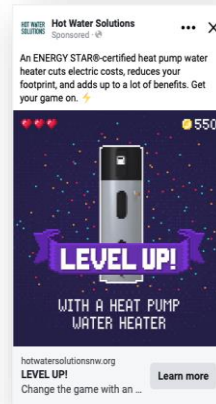
- Brand: Hot Water Solutions
- Timing: June 2026
- Channels: Social media, display, and digital audio
- Market: Idaho, Montana, Oregon, and Washington consumers
- Media spend: \$80K
- Calls-to-Action:
 - From ads: Drive to campaign landing page on HotWaterSolutionsNW.org
 - From landing page: Drive to utility websites, local installers, retailers, manufacturers



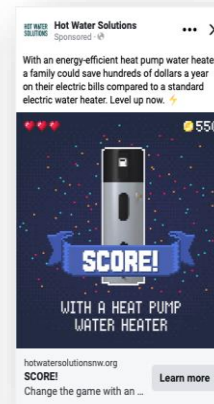
Campaign Ads



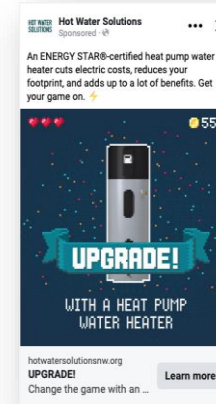
You Win



Level Up



Score



Upgrade



Triunfa



Sales Ganando



Sube de Nivel



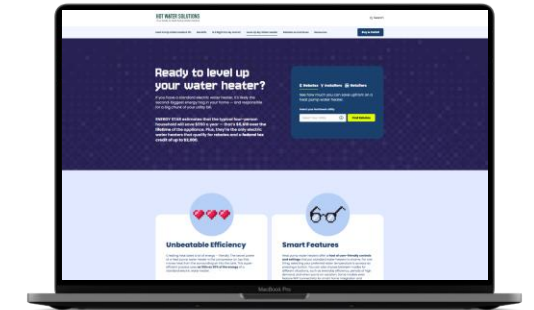
Dale Upgrade

Campaign User Journey

Level Up ads on media channels



Level Up campaign landing page



DIY



Retailers



Manufacturers




Local installer



Local utility



Planned Timeline for Proposed 2026 HPWH Campaign

- Q1 2026
 - February 10: Propose an optimized Level Up consumer campaign at the Q1 RPAC/RPAC+ meeting
- Q2 2026
 - April: Deliver recommended optimizations and hold 1:1 funding utility meetings as requested
 -  May 19: Hold campaign elections at the Q2 RPAC/RPAC+ meeting
 - June 1 through June 30: Campaign runs in elected areas
- Q3 2026
 - September 1: Share campaign results at the Q3 RPAC/RPAC+ meeting



Q&A / *Discussion*



RPAC+ Elections: June 2026 HPWH Consumer Campaign

2026 HPWH Consumer Marketing Campaign			
	Participate ✓	Self-Deliver ✓	Exempt ✓
Avista			
BPA			
Chelan PUD			
Clark PUD			
Energy Trust (incl PGE)	✓		
Idaho Power			
NorthWestern Energy	✓		
Pacific Power	✓		
Puget Sound Energy			
Seattle City Light	✓		
Snohomish PUD			
Tacoma Power			



✓ = official utility election provided via email in advance

Thank You!

Britt Cutsforth Dawkins

Senior Manager, Marketing Strategy

bdawkins@neea.org



Agenda

All Times Pacific

9:30-9:55	Welcome, Introductions, Agenda / Packet Review
9:55-10:05	Housekeeping & Looking Ahead
10:05-10:35	Annual Electric Portfolio Review: Savings & Risks
10 min	<i>BREAK</i>
10:45-11:45	Program Expansions Overview & Update
45 min	<i>LUNCH</i>
12:30-1:30	RPAC Round Robin <i>Special Request:</i> Any new initiatives or adjustments to programs / plans related to affordability? What's the biggest overlap between your EE efforts and affordability needs?
10 min	<i>BREAK</i>
1:40-2:00	Market Transformation Highlight: Heat Pump Water Heaters Market Progress
2:00-2:20	[RPAC+ ELECTIONS] Proposed 2026 HPWH Marketing Campaign
2:20-2:50	Efficient Fans Program: Refresher & Milestone *Q3 Vote Prep*
2:50-3:00	Wrap-Up & Adjourn





*Preview for Q3 Vote:
Efficient Fans Program Advancement
Milestone*

Nick Michel

Sr. Market Transformation Manager, Motor-driven Systems

Alexis Muench

Program Manager, Efficient Fans

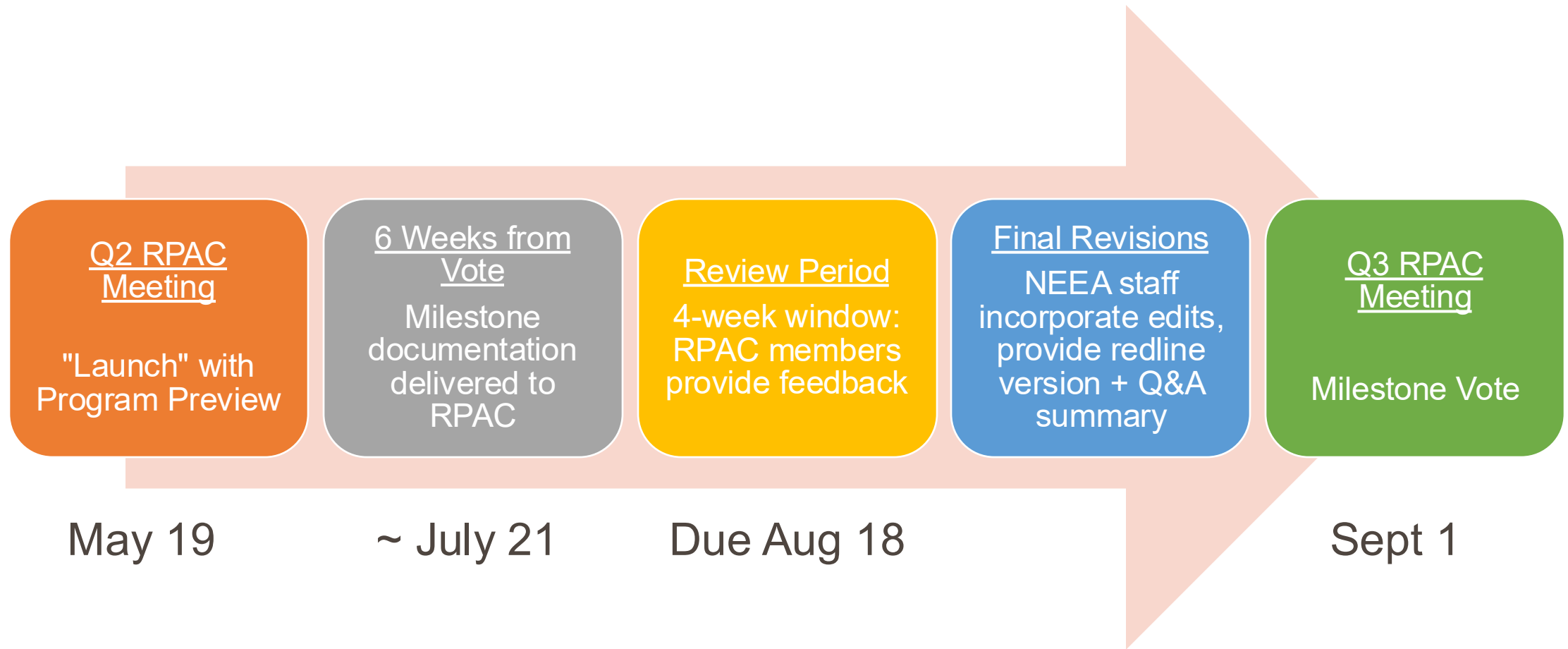


Program Advancement



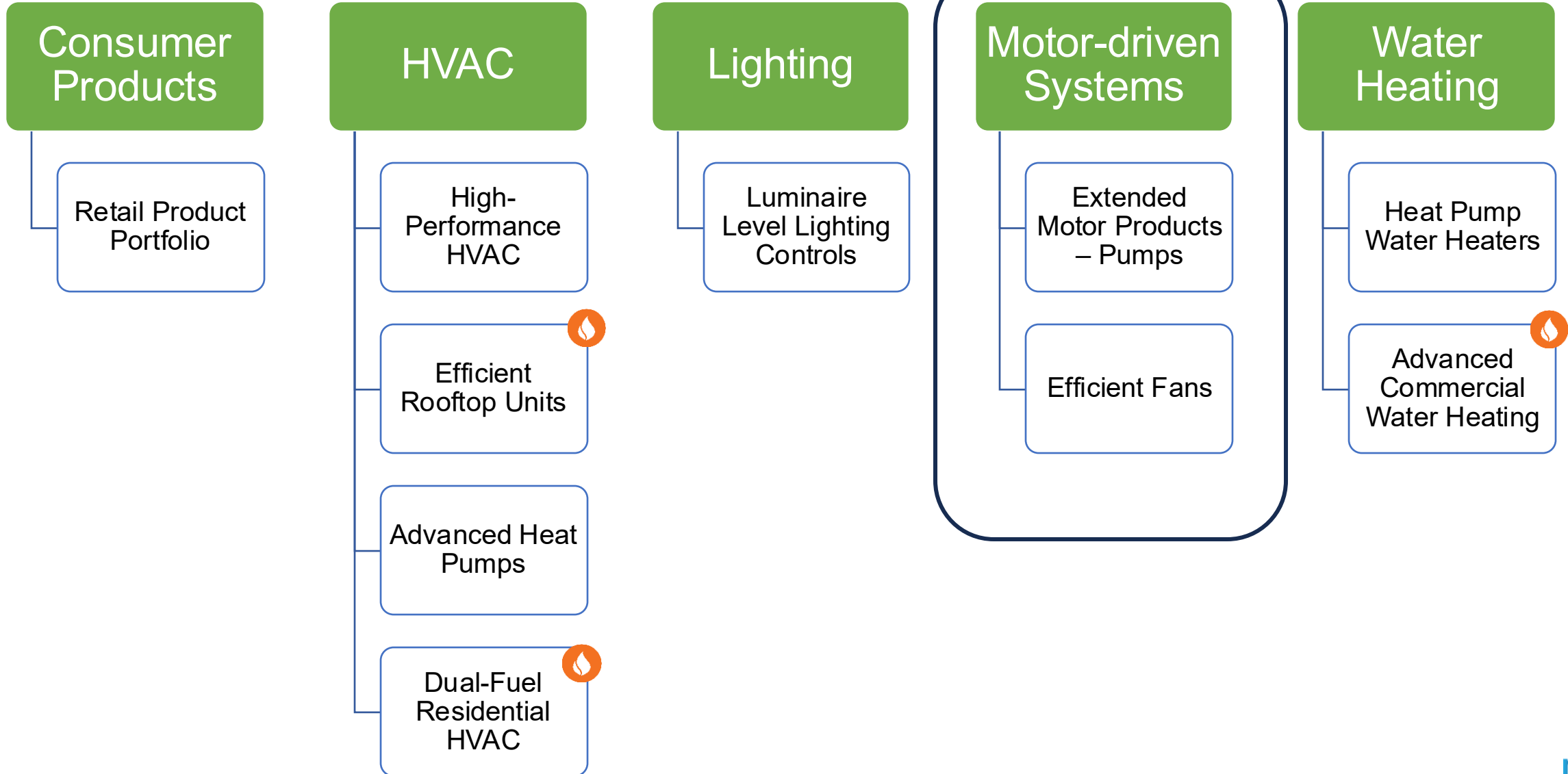


What to Expect





Portfolio by Product Group





Motor-Driven Systems Product Group

- **Scope**

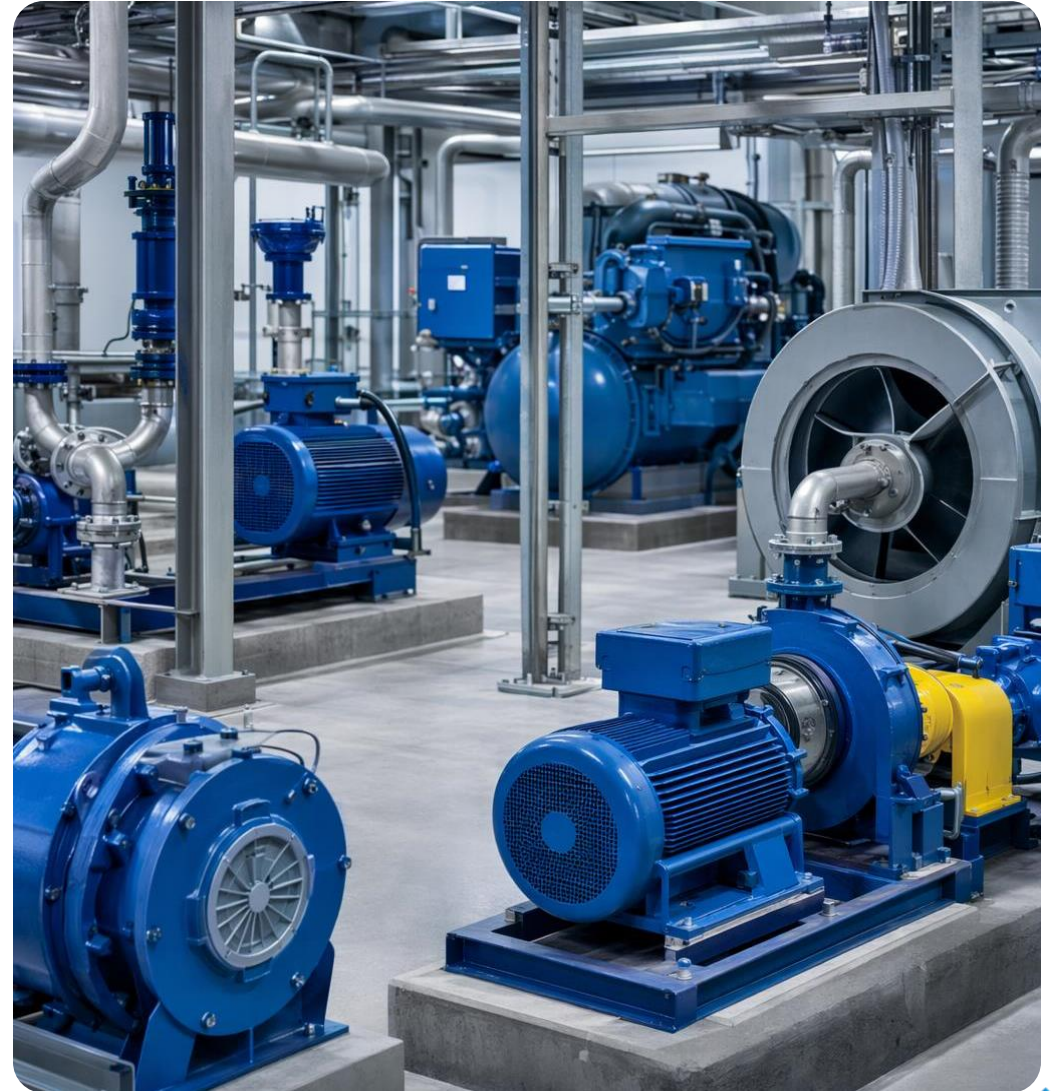
- Any electric motor-driven **system** with an active-end that converts electric power into mechanical power
- Includes fans, pumps, compressors, drives, and motors

- **Vision**

- The market adopts motor-driven products designed to optimize system efficiency

- **Channels**

- Manufacturers & Reps, Trade Associations, Voluntary Specifications





Motor-Driven Systems Product Group

Programs

- **Efficient Fans**
 - Efficiency measured through system metric that will support a federal standard
 - Manufacturer & Rep engagement to optimize products and engage key leverage points
 - Trade association driving awareness and value of fan efficiency
- XMP – Pumps
- Drives (in development)



Efficient Fans Program Review

Desired Outcomes



Shared understanding of program approach and status



Alignment on milestone process, expectations and next steps



Identification of RPAC concerns or questions



Efficient Fans Program Refresher

- **Program Focus**

- Stand-alone commercial and industrial fan systems (fan + motor + controller)
 - FEI rated fans and blowers that are standalone or not part of an efficiency rated packaged system

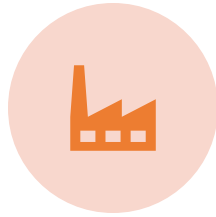
- **Market Transformation Approach**

- Increase visibility and value of FEI in the selection process
- Drive market adoption through education and channel engagement (reps, specifiers, installers)

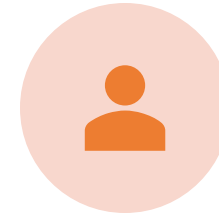
- **Technical Savings Potential**

- Commercial: 78 aMW
- Industrial: 83 aMW

Program Development Accomplishments



Engaged
Manufacturer Reps



Collected Market
Feedback on
Specifier Behavior



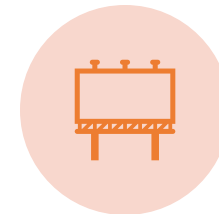
Added Manufacturer
and Manufacturer
Reps Partnerships
and Data



Used Engagement to
Understand/Validate
Barriers



Completed Market
Characterization



Additional Research
on Fan Purchasing
Decisions

Program Development Key Learnings





1. Awareness vs. Understanding of FEI

- **Key Insight**

- *While awareness of FEI is increasing across the market, it is not yet consistently prioritized in fan selection decisions.*

- **What We Learned**

- Cost, performance requirements, and project constraints continue to dominate fan selection decisions
- Additional education and integration of FEI into the selection process are needed for FEI to consistently guide purchasing and specification decisions



2. Market Change will Require Additional Intervention Points

- **Key Insight**

- *Market transformation for efficient fans requires coordinated action across the broader fan ecosystem — including manufacturers, manufacturer reps, industry organizations, and code bodies.*

- **What We Learned**

- Collaboration with AMCA (Air Movement and Controls Association) is critical to align messaging, support codes and standards development, and reinforce market signals
- Manufacturers provide a critical foundation, but coordination across reps, specifiers, and industry organizations is needed to accelerate market adoption



3. *Specifiers are the Key Leverage Point*

- **Key Insight**

- *The design and selection stage is the critical leverage point for influencing efficient fan outcomes, with manufacturer reps playing a key role in shaping specification and selection decisions.*

- **What We Learned**

- Specifiers play a central role in fan selection decisions, and additional education and integration of FEI into selection workflows can help make FEI more actionable at the point of decision

Where We Are Influencing Fan Selection Decisions

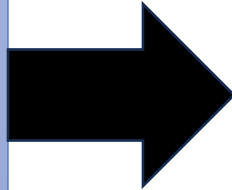
Market Actor	Where They Show Up	What Needs to Change
Manufacturers	Develop tools & products, selection software	Increase FEI visibility in selection software
Manufacturer Reps	Influence selections	Promote FEI in real-time decision-making
Designers / Specifiers	Specify Equipment	Incorporate FEI into specifications
Industry Organizations (AMCA)	Industry Alignment	Support education, standards, and awareness



How Our Strategy Drives Market Change

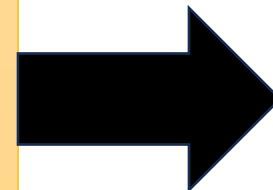
Barriers and Opportunities

- Awareness and understanding of FEI and efficient fan systems remains limited
- Selection decisions prioritize cost, performance, and project constraints
- First cost is critical at the bidding and selection phase of fan projects
- AMCA and manufacturers are aligned on FEI and support its use



Interventions

- Increase FEI visibility and usability in the purchasing process
- Support manufacturer reps in reinforcing FEI and its value proposition during selection
- Educate specifiers on FEI and its value in fan selection process and decision-making
- Collaborate with AMCA and industry to influence increasingly stringent codes and standards

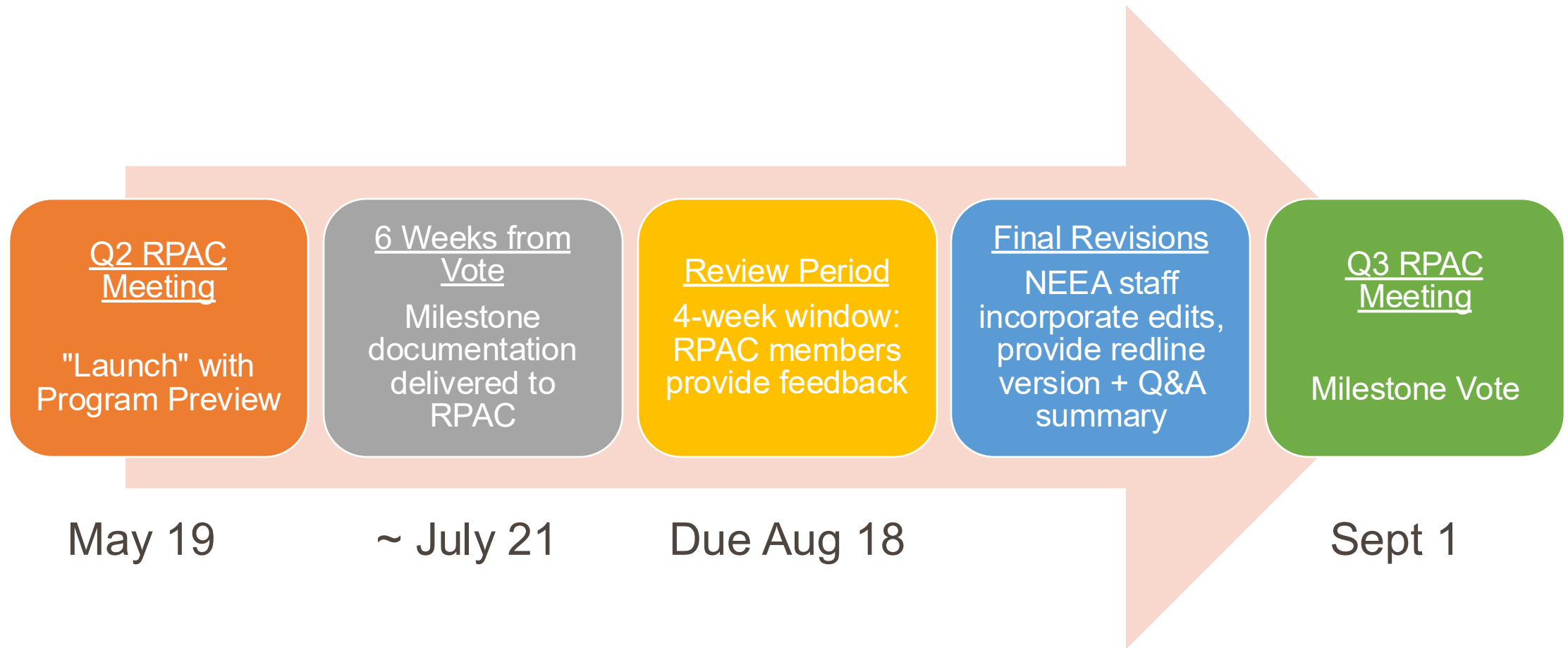


Ultimate Outcome

- FEI is consistently used in fan selection decisions
- Higher efficiency fans are specified and installed
- Market shifts toward higher average FEI over time



What to Expect





Questions & Discussion

- What questions or feedback do you have?
- What would you like to ensure is included or clarified in the milestone document provided to RPAC?
- Do you anticipate wanting to have 1:1 time with NEEA staff prior to the milestone vote?

Thank You!

Nick Michel

Sr. Market Transformation Manager, Motor-driven Systems

nmichel@neea.org

Alexis Muench

Program Manager, Efficient Fans

amuench@neea.org





Action Items / Recap / Final Qs?

- RPAC Members:

- **By June 1** – any concerns with moving Q4 to Monday Nov 2
- Do you anticipate wanting an Efficient Fans milestone review meeting with your team?

- Chelan

- NEEA staff:

- Schedule Fans milestone review with Chelan, ?

Meeting Feedback

- ❖ One thing you learned / appreciated?
- ❖ Opportunities for improvement?
- ❖ Would you like us to follow up with you on anything?





Public Comments?

Thank You!

That's a wrap, RPAC! Until we meet again...

➤ Q3 2026: Tuesday, Sept 1 | Virtual

