

**Q2 2026: Tuesday, June 2**

10:30am – 3:00pm (Pacific)

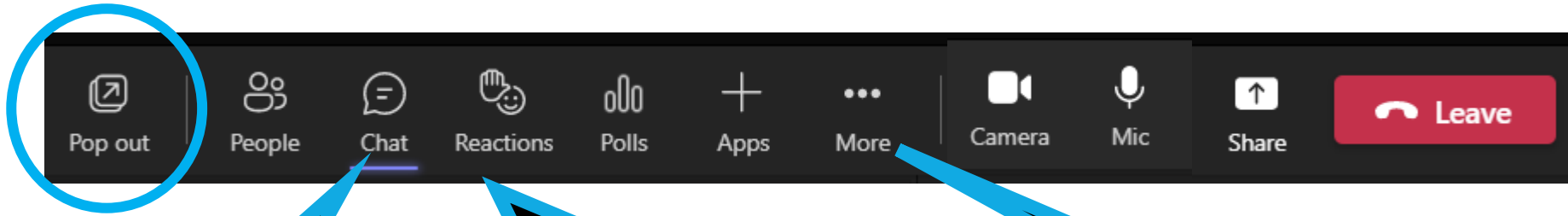
Hybrid @ NEEA's office

# *Natural Gas Advisory Committee*



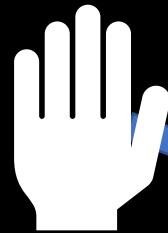


# Tools for Today: Engaging on Teams

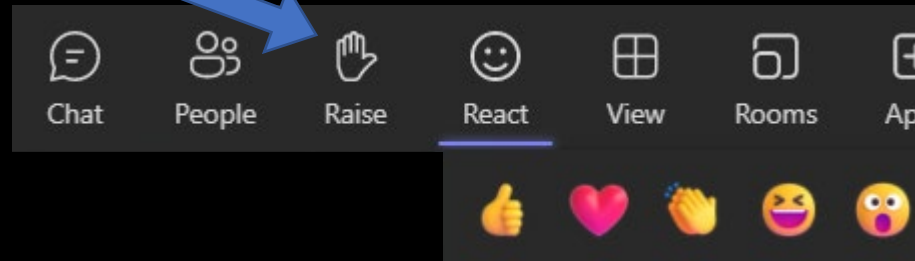


The chat is not captured automatically.

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 NGAC 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
- **Monitor outcomes of relevant workgroups & Cost-Effectiveness Committee (CEAC) meetings**
- Advises NEEA's Executive Director on portfolio decisions



# Agenda

All Times Pacific

|             |   |
|-------------|---|
| 10:30-10:50 | Welcome, Introductions, Agenda Packet Review  |
| 10:50-11:05 | Housekeeping, Looking Ahead   |
| 11:05-11:30 | Annual Gas Portfolio Review: Savings & Risks  |
| 60 min      | <b>LUNCH</b>  |
| 12:30-1:00  | <b>NGAC Round Robin</b><br><i>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?</i> |
| 1:00-1:30   | <b>Quarterly Highlights</b>   |
| 10 min      | <b>BREAK</b>  |
| 1:40-2:40   | <b>Program Expansions Overview and Update</b>   |
| 2:40-2:50   | <b>Public comment, wrap up and adjourn</b>  |



# Packet Review & Informational Updates

## Tier 1: Agenda Items

- ✓ *Annual Portfolio Review: Savings & Risk (pg. 3)*
- ✓ *Quarterly Highlights Report (pg. 7)*
- ✓ *Program Expansions Process Overview & Updates (pg. 18)*

## Tier 2: Informational Updates

- ✓ *Q1 2026 Recap: Market Progress Report (pg. 19)*

## Tier 3: Additional Resources

- ✓ *Quarterly newsletters, past NGAC meeting materials, NGAC charter (pg. 2)*

xx?

# Introductions

- Name
- Organization
- *And...*



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# Housekeeping

- *Product Council Updates*
- *Past Meeting Notes*
  - ✓ *Action items and questions*
- *Updates*
  - ✓ *Check in on Informational Memos*
- *Announcements & Reminders*
  - ✓ *2026 NEEA Meetings*
  - ✓ *Other regional / industry events*



# *Product Council Updates*

***Noe Contreras***

***[Ncontreras@neea.org](mailto:Ncontreras@neea.org)***

# Product Council



About Market Transformation Portfolio Research + Data Collaborate News + Events Search

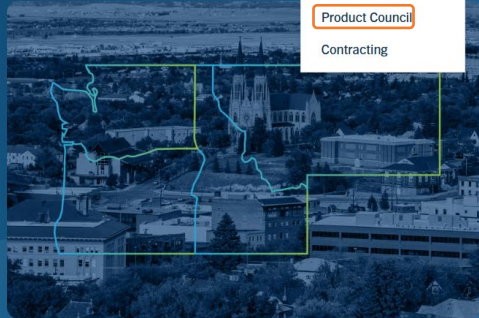
- Committees
- Product Council
- Contracting

## Advancing Energy Efficiency in the Northwest

The Northwest Energy Efficiency Alliance (NEEA) is an alliance of utilities and partners that pools resources and shares risks to transform the market for energy efficiency to the benefit of all consumers in the Northwest.

About NEEA

Market Transformation Portfolio



## Product Council

A casual forum for Northwest utilities and energy efficiency organizations to explore new technologies and market trends to meet regional energy goals.

Suggest A Topic



## Access Essential Information

Find information about recent Product Council meetings, including slides and recordings, as well as dates of upcoming meetings.

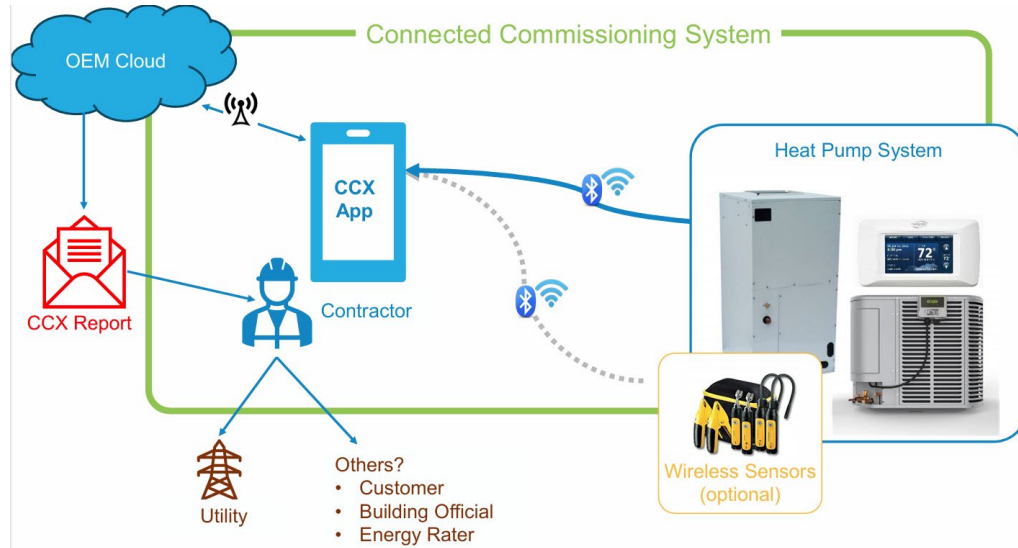
Go to Materials Library

View Upcoming Events





# Heat Pump Equipment Commissioning Systems



- Digital for ease of sharing
- Representatives from Measure Quick, Daikin, and Trane provided brief demonstrations of their systems' capabilities, contractor experience, and what data reporting is available.



## Product Council – Heat Pump Commissioning



# ResHVAC Dual-Fuel Systems Analysis



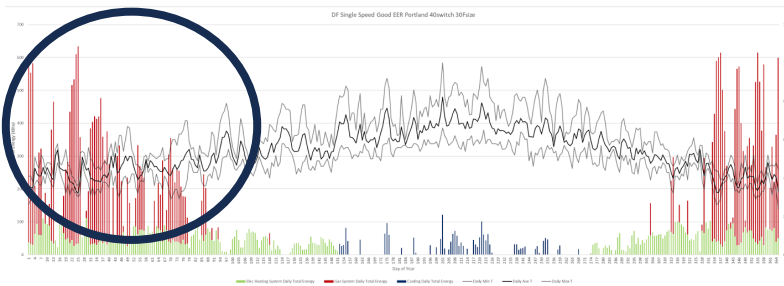
- Variable Capacity Heat Pump Levelized Cost Tool
- Customer value proposition breakeven electric COP
  - 2.1 in WA & OR for NG
  - 3.4 in ID & MT for NG
  - 1.3 in ID & MT for Propane

## Switchover @ 40F. Size 30F.

### Switchover @ 40F

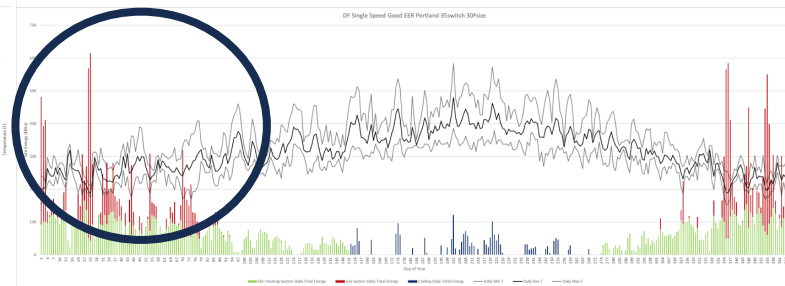
- Gas use in **red**
- Heat pump heating in **green**
- Cooling in **blue**

Annual plot by day  
Site energy in kBtu/day  
Outdoor temperature in F (black and gray)



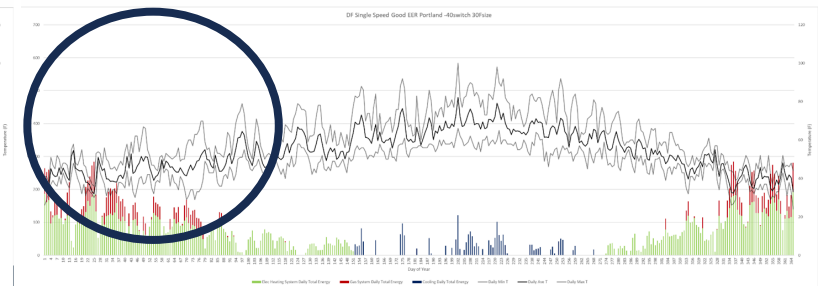
## Switchover @ 35F Size 30F

Less gas use with lower switchover temperature



## Supplement: 30F HP size

The supplement control minimizes gas. Uses gas furnace only when heat pump output capacity cannot meet 100% of the heating load.



## Product Council – Dual Fuel Systems

# Housekeeping

- *Past Meeting Notes*
  - ✓ Action items and questions
- *Updates*
  - ✓ Check in on Informational Memos
- *Announcements & Reminders*
  - ✓ 2026 NEEA Meetings
  - ✓ Other regional / industry events



# March 3 Notes & Action Items


- ✓ NEEA Staff: Include "at-risk" Strike Zone updates in future quarterly highlight slides.
- ✓ Jason Jones: Follow up with Carlos Limon on RTU field study parameters.
- ✓ Mark Rehley: Provide a briefing for the committee on national IECC development trends.
- ✓ Alisyn Maggiora: Distribute the full Commercial Water Heat Modeling slide deck and follow up with Paul Koenig on MT 101 training for UTC staff.
- ✓ Committee Members: Provide feedback on the Dual-Fuel Work Group charter by March 20.
- ✓ Committee Members: Notify Alisyn by March 30 for inclusion in the March 31 MT 101 webinar






## *Quick check-in: Informational Memos*

- **\*REMINDER\*** Q1 2026 Market Progress Report (pg. 19-30)





# Upcoming 2026 NEEA Committee Meetings

 = dual-fuel

|                     |   |   |
|---------------------|---|---|
| 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 |    |
| Tuesday September 1 | Regional Portfolio Advisory Committee     |   |
| Mon-Tues Sept 14-15 | Board Meeting (Spokane, WA)               |   |
| Wednesday Sept 16   | Regional Emerging Tech Advisory Committee |  |

# 2026 NGAC Meeting Dates

| Quarter                | Day(s)    | Date(s)          | TIME (PST) | LOCATION   |
|------------------------|-----------|------------------|------------|--|
| <i>Interim Webinar</i> | Wednesday | Jan 28           | 1-2pm      | Virtual  |
| <b>Q1</b>              | Tuesday   | Mar 3            | 9am-4pm    | <i>Now Virtual</i>   |
| <i>Interim Webinar</i> | Thursday  | Apr 16           | 1-2pm      | Virtual  |
| <b>Q2</b>              | Tuesday   | June 2           | 9am-4pm    | <b>Hybrid (NEEA)</b>                        |
| <b>Q3</b>              | –         | <b>No Q3 Mtg</b> | –          | –  |
| <i>Interim Webinar</i> | Wednesday | Sept 9           | 1-2:30pm   | Virtual  |
| <b>Q4</b>              | Thursday  | Oct 22           | 9am-4pm    | <b>Hybrid (tentative based on topics)</b>  |
| <i>Interim Webinar</i> | Wednesday | Dec 9            | 1-2pm      | Virtual  |

NOTE:  
Extending  
to 90 min

 = Proposed Hybrid / In-person Option

# Agenda

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# *Annual Gas Portfolio Review: Savings, Risks and Opportunities*

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**Stephanie Rider**

Director, Portfolio Management, Data Strategy and External Reporting



**Memo  
pg. 3-6**

## *Natural Gas Portfolio Summary*

- Progressing the development and advancement of market transformation programs
- A lot of leverage between electric and natural gas portfolios
- Building breadth through more fuel-neutral and dual-fuel system solutions
- Known headwinds in Codes and Standards
- Longer ramp in a commercial-market portfolio



# Natural Gas Market Transformation Portfolio - Current

Status as of May 2026

Infrastructure investments and specific code and standard work not included in this depiction of the portfolio





# Natural Gas Market Transformation Portfolio, mid-2027

Expected Status by mid-2027

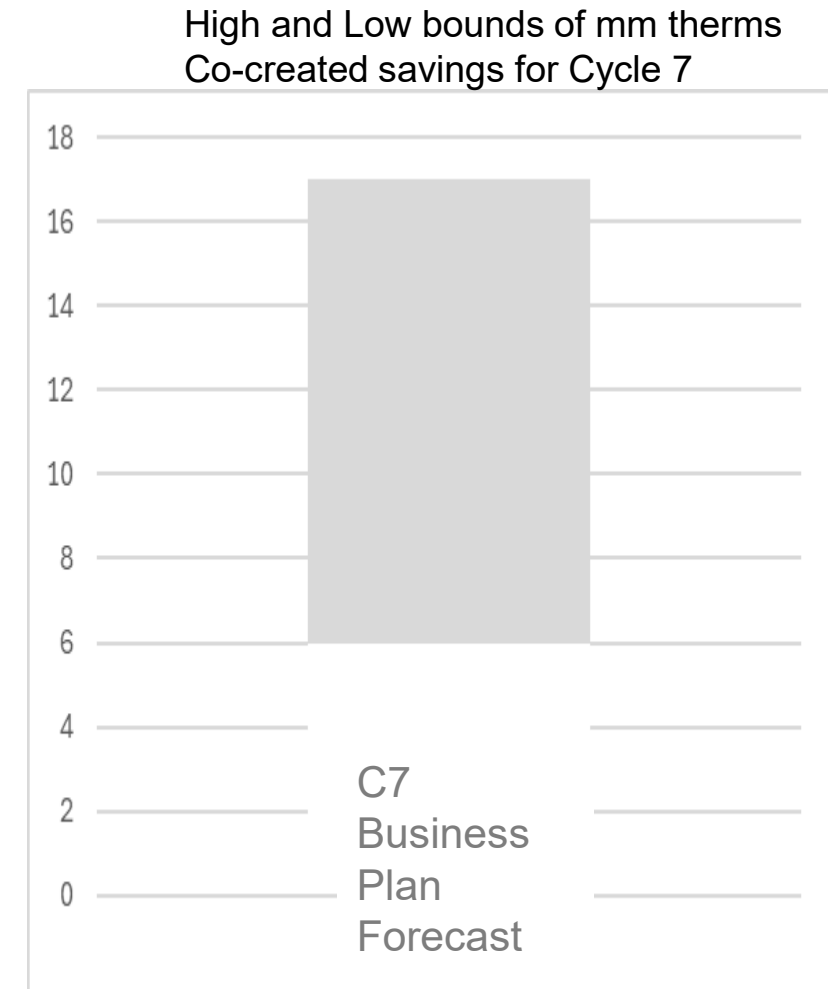
Infrastructure investments and specific code and standard work not included in this depiction of the portfolio



## Over 70mm therms of technical potential in the portfolio

# Gas Portfolio Near Term Expectations

- **Over 70mm therms of technical potential in the portfolio**
- Headwinds in New Construction and New Product Standards is bringing our expectation down to the lower end of this range
- Upside expected as we advance and quantify the new programs in the portfolio
  - Only one of the five programs is *forecast-able* right now
  - Timing of value delivery will be better known as programs advance next year

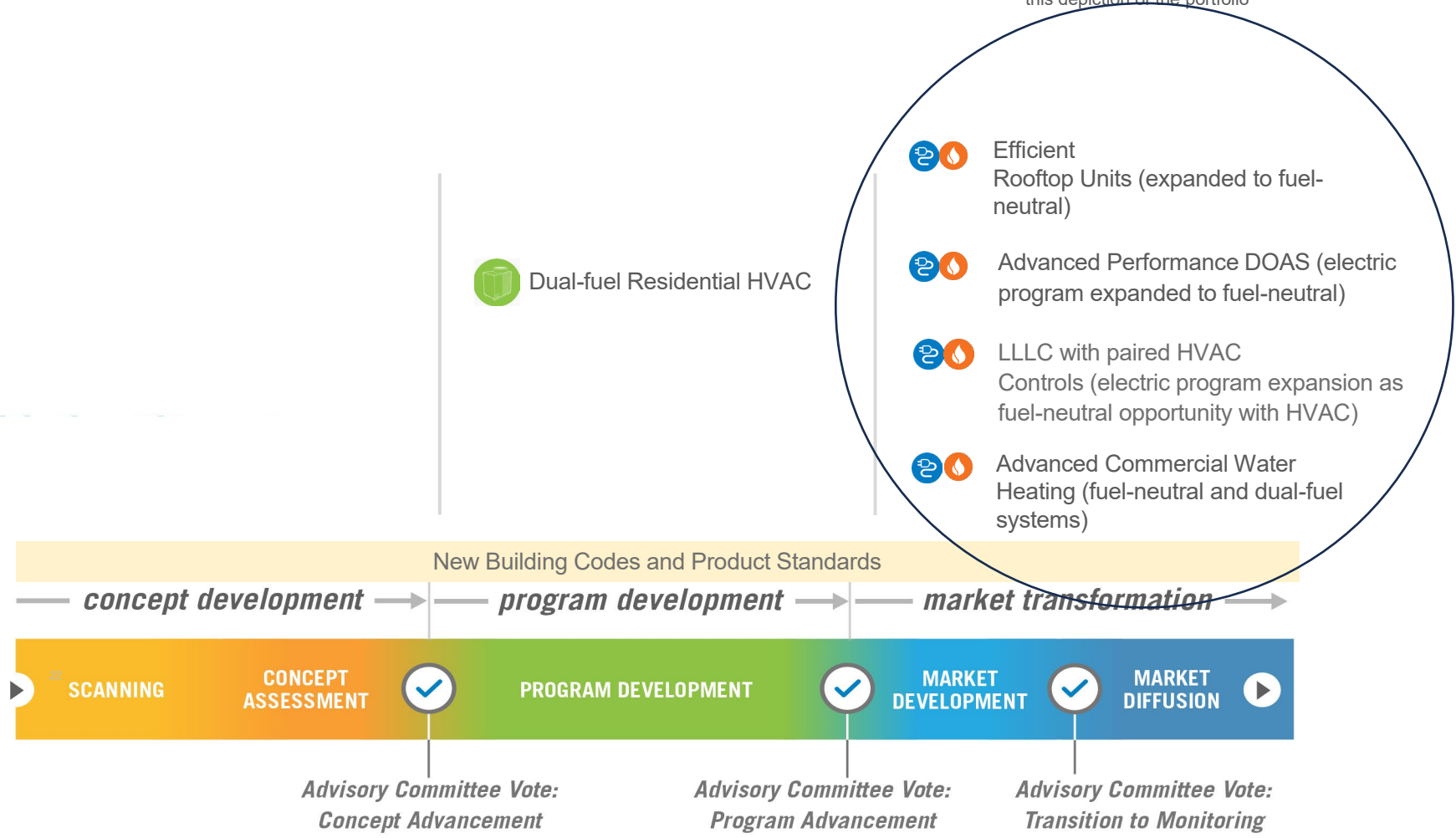




# Natural Gas Market Transformation Portfolio, mid-2027

Expected Status by mid-2027

Infrastructure investments and specific code and standard work not included in this depiction of the portfolio

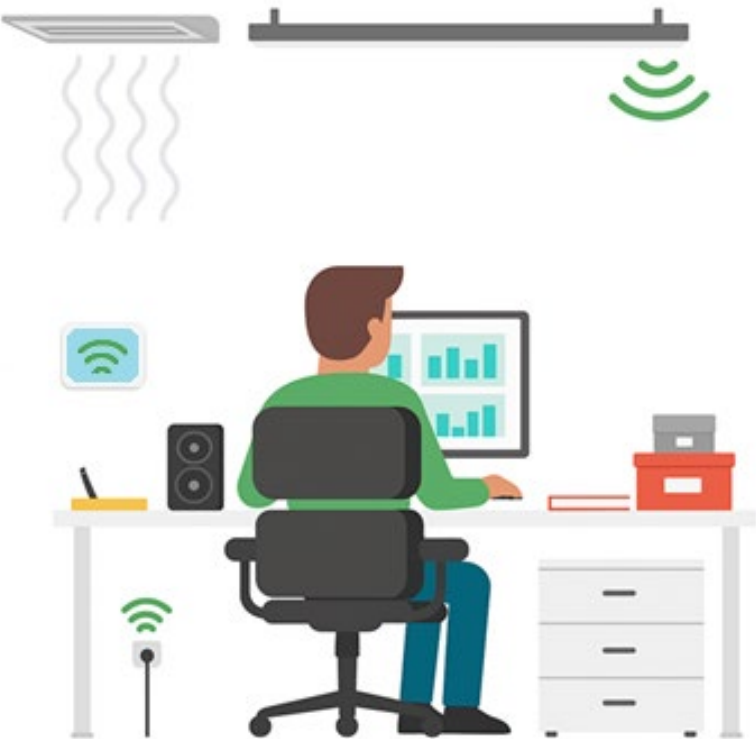


## Over 70mm therms of technical potential in the portfolio

# Portfolio Opportunities

## LLLC with HVAC Controls

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



# Commercial Heat Pump Water Heaters

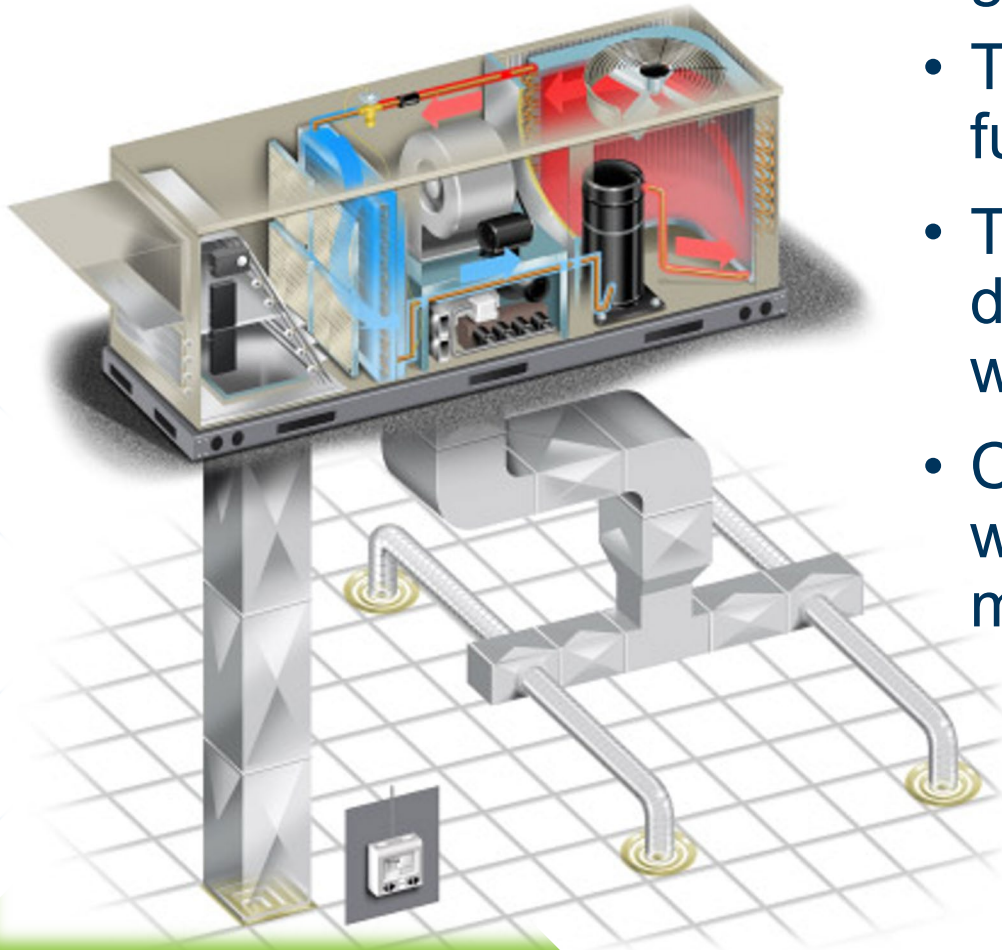
## *Portfolio Opportunities*

- The gas, electric and dual fuel systems in this space engage the same market actors
- Includes gas and electric heat pumps (pilots underway in both)
- Gas-focused Program Advancement milestone is on track for mid 2027. The program will explore expansion to include all-electric post-milestone.



# Portfolio Opportunities

## Efficient 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 savings through system improvements with the shell and dampers
- Currently exploring how an expanded program will be better positioned to engage with the market

# Thank You!

## Stephanie Rider

Director, Portfolio Management, Data Strategy and External Reporting

[srider@neea.org](mailto:srider@neea.org)



# *Lunch*

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*Please return by  
12:30pm Pacific*

# ⇒ *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:*

- Any new initiatives or adjustments to programs / plans related to affordability?
- What's the biggest overlap between your EE efforts and affordability needs?

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# PORTFOLIO HIGHLIGHTS

➤ *Q1 2026 Recap*



# Program Highlights

Efficient Rooftop Units (ERTU)

[jjones@neea.org](mailto:jjones@neea.org)

- Manufacturer Engagement on target: AHR Expo highlight: One manufacturer is expanding double-wall (R12+) offerings
- Distributor / Manufacturer Rep Recruitment on target: Currently working with 4 Manufacturers and Reps to identify projects
- Market Actor Awareness Engagements on target.
- **Collaboration Opportunity:** Still seeking field study sites to validate the National RTU Energy Modeling for gas-fired (gas or hybrid heating) RTUs.

## Initiative Lifecycle



# Program Highlights

Advanced Commercial Water Heating (ACWH)

[mmejia@neea.org](mailto:mmejia@neea.org)

- Validation testing on target. Ongoing pilots and future testing for hotel applications.
- Market research on target. Market Characterization completed.
- Engagement on target. Awarded vendor and plan development begins in Q2.
- **Collaboration Opportunity:** Seeking leads to test gas heat pumps in a full-service restaurant application.

## Initiative Lifecycle



# Program Highlights

Dual-Fuel Residential HVAC (DFRes HVAC)

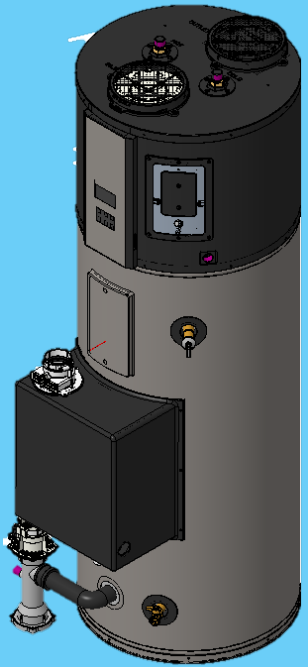
[dsunada@neea.org](mailto:dsunada@neea.org)

- Market Characterization Study ongoing. Final report expected Q4 2026
- Clark PUD/NWN demonstration data collection complete. Analysis and reporting ongoing. Final report expected in Q3 2026
- **Collaboration Opportunity:** Seeking sites and partners for dual-fuel switchover temperature experience field study
  - **\*Heads Up** (Market Progress Report): Switchover temperature field study will collect data across 2026-27 heating season and be completed in 2027

## Initiative Lifecycle



# Navien Residential Dual-Fuel Water Heater



Navien NXW700

- 50-gal dual fuel water heater (drop-in)
- 120V plug-in electric heat pump
- 40k Btu and 60k Btu
- Condensing gas burner
- Multiple out-of-the-box operating modes

Original Product Council Recording and slides:  
[Navien Dual-Fuel Residential Heat Pump Water Heater](#)

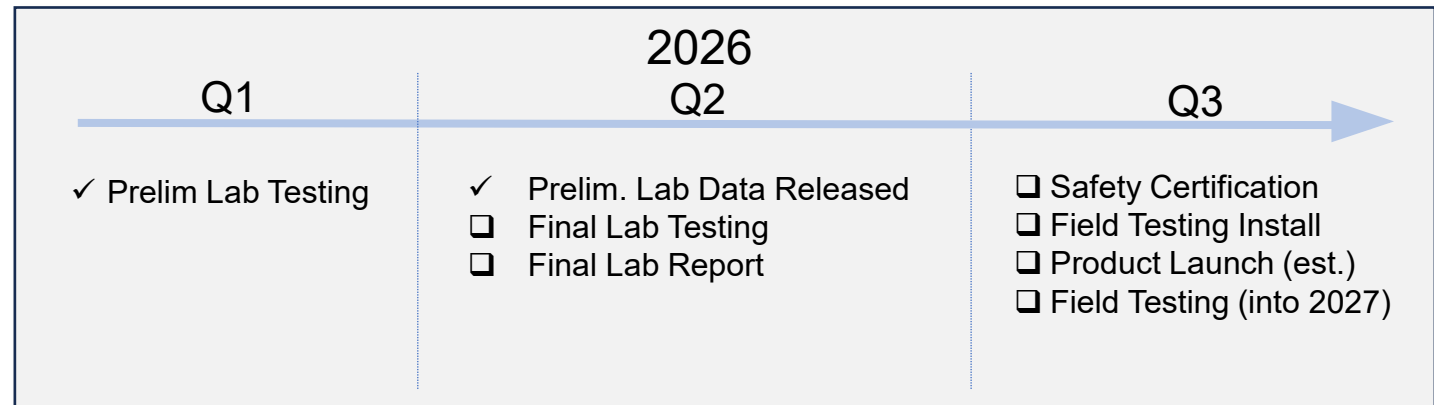
## Scanning Highlights

- Preliminary GTI Lab Testing results validate performance

|                      | CSA Testing Data | GTI Prelim Results |
|----------------------|------------------|--------------------|
| FHR* (gallons)       | 99.7             | 98.2               |
| UEF* – Gas Only mode | 0.929            | 0.928              |
| UEF* – E-Saver mode  | 4.15             | 4.18               |

\*FHR – First Hour Rating, UEF – Uniform Energy Factor

- Confirmed Field Testing locations (PSE and Clark County)
- Safety Certification (ETL) expected late July 2026
- Market Launch expected September 2026





# ***North American Gas Heat Pump Collaborative***

- **Research Projects**
  - Commercial Water Heating Market Characterization: complete
  - Savings Assessment: in-progress
- **Manufacturer Outreach**
  - Monitoring any changes with SMTI
  - Robur North American expansion and visit in July
  - Finalizing agreements with Natural Gas Innovation Fund (NGIF) to support Vicot in North America

# Codes, Standards, New Construction Highlights

Q1 2026

- **Codes**
  - **Washington** code delayed until late 2026
  - **Oregon** residential code on track for April 1, 2027; started stretch code development
  - **Idaho** – Developed 2024 IECC with amendments; failed legislative approval
  - **Montana** – Considering 2024 IECC
  - **2027 IECC** – On track for 2027, starting 2030
- **National Standards**
  - Residential gas water heaters and commercial furnaces being challenged at the Supreme court and by manufacturers' requests for standards delay.
- **New Construction**
  - Cooperating with RTF on New Homes Protocol.

# *Check-in: New Quarterly Report Format*

- ❖ Still working for you?
- ❖ Anything you like / don't like?
- ❖ Anything missing or unclear?





***Break***

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# *Program Expansions Overview and Update*

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**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: Condensing RTUs to Efficient RTUs***

- **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: Advanced Performance DOAS to include gas systems***



## *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 — Advanced Performance 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
- Expansion Benefits

### **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

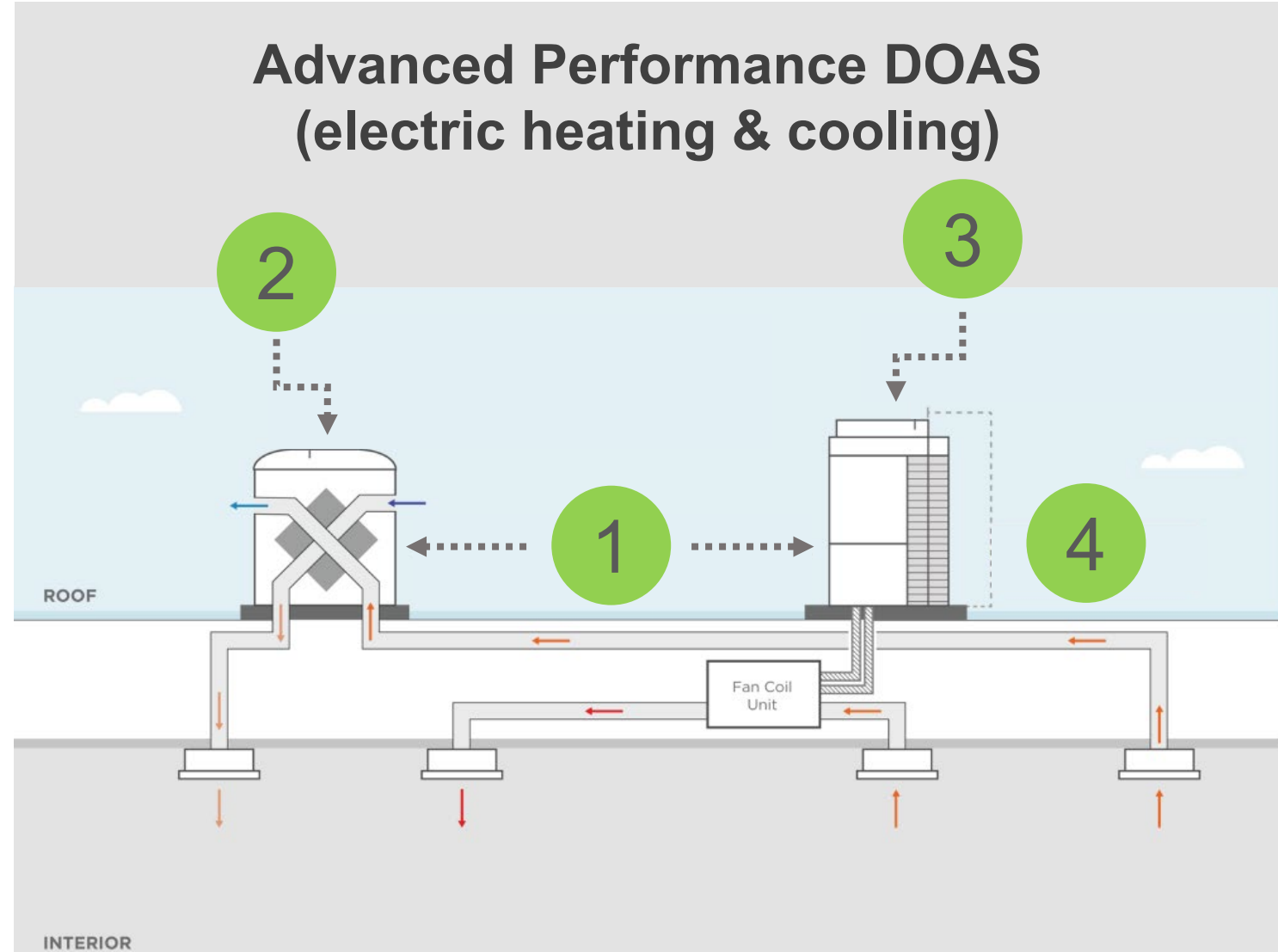
High efficiency heat/energy recovery ventilator with  $\geq 82\%$  sensible effectiveness

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 / 183  
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

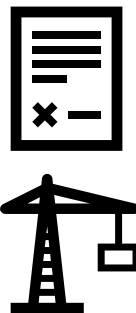
## Looking Ahead



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



Communicating full benefits of AP DOAS 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

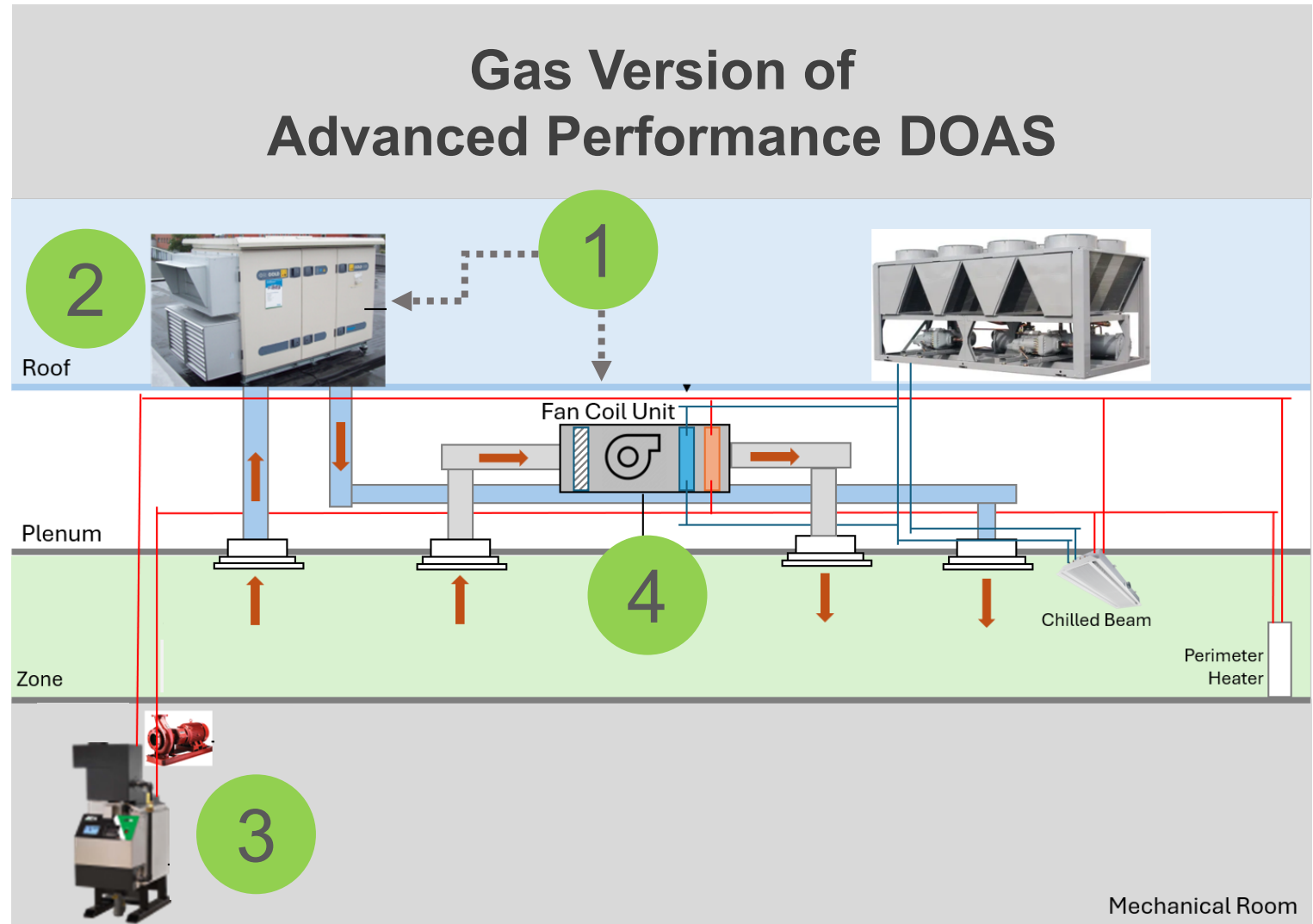
3

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 when expanding across fuels*

- ✓ 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
- ✓ Combining funding sources will result in increased program activities at a lower cost to each 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

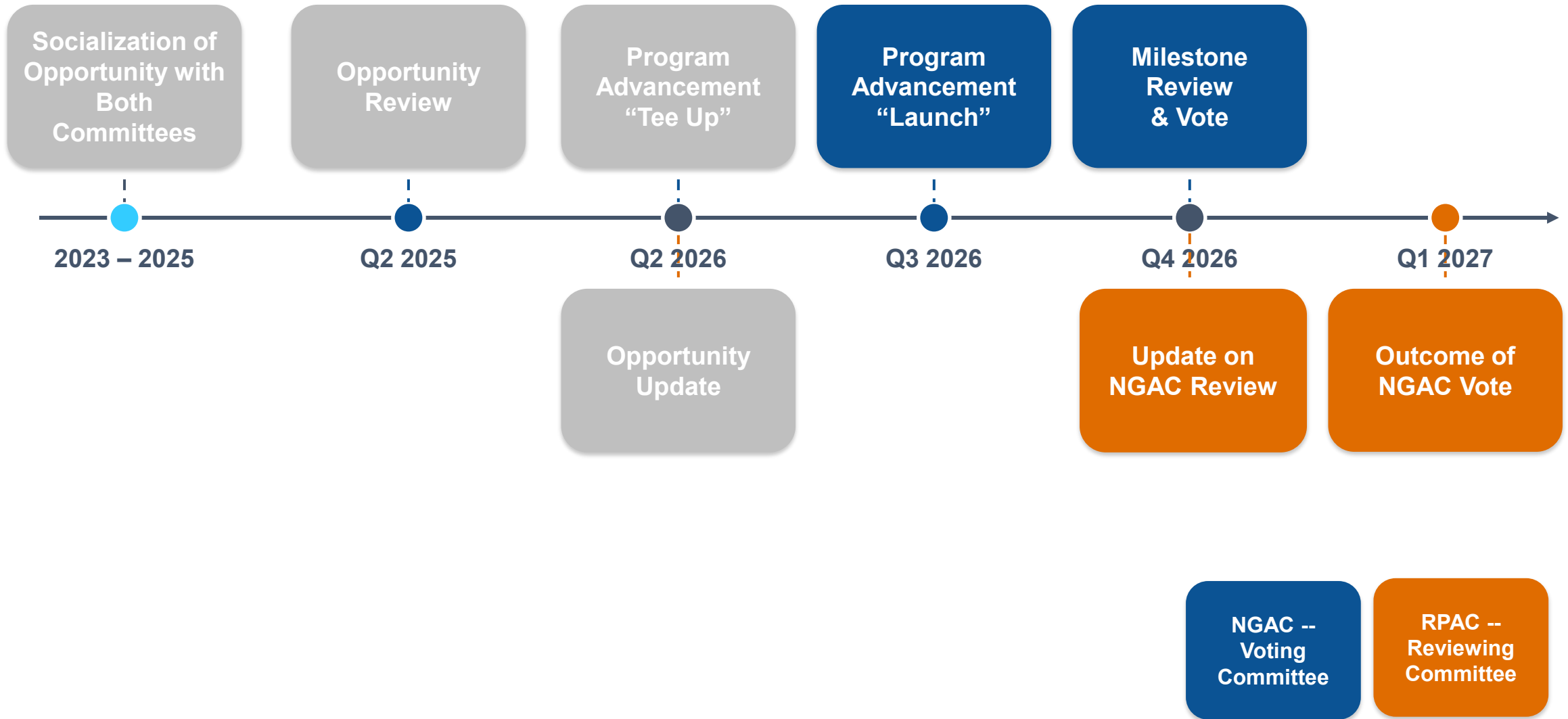
***Thank you!***

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 — Advanced Performance 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](mailto:emoore@neea.org)

## Dave Hammond

Sr. Program Manager, Commercial HVAC

[dhammond@neea.org](mailto:dhammond@neea.org)





## *Action Items / Recap / Final Qs?*

- NGAC Members:
  - XX
- NEEA staff:
  - XX

# *Meeting Feedback*

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





# *Public Comments?*

# Thank You!

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

➤ Q3 2026 Webinar: Wednesday, Sept 9 | 1-2:30

