



Q2 Residential Coordinating Committee (RCC)

June 16, 2026

9:00 a.m. – 12:00 p.m.

Virtual Meeting

Meeting Attendees

Committee Members:

Mikayla Bateman [Avista]

Carolyn Beebe [Snohomish PUD]

John Petosa [Snohomish PUD]

Jonathon Belmont [BPA]

John Davey [Puget Sound Energy]

Brandon Gee [Emerald PUD]

Griselda Gonzalez [Chelan PUD]

Todd Greenwell [Idaho Power]

Marshall Johnson [Energy Trust]

Haley Puntney [Inland Power & Light]

Lonnie Junderson [Tacoma Power]

Lis Saunders [Tacoma Power]

Guests:

Sarah Guenzler [Snohomish PUD]

NEEA Staff:

Suzi Asmus, Drea Bell, Anne Brink, Britt Cutsforth Dawkins, Anouksha Gardner, Alexa Hujik, Alisyn Maggiora, Alex Merrill, Jesse Nienow-Macke, Stephen O'Guin, Stephanie Quinn, Emily Rosenbloom, Tess Studley, and Sarah Widder

Resources

- Agenda Packet: [Q2 2026 RCC Agenda Packet - Northwest Energy Efficiency Alliance \(NEEA\)](#)
- Slide Deck: [Q2 2026 RCC Meeting Slides - Northwest Energy Efficiency Alliance \(NEEA\)](#)
- Recording: Q2 Meeting was transcribed

Welcome and Packet Review

- Meeting Packet Highlights
- Collective Role – Working Together – Please come prepared to participate!
- Agenda Overview – Welcome, Housekeeping, Q4 Topic Check In, Regional Roundtable, Regional Priority Topic: Advanced Heat Pumps – Minimizing Supplemental Heat and New Measure Development Priority
- Packet Review Reminder – Tier 1: Agenda Items, Tier 2: Memos and Program Activity Reports, Tier 3: Additional Resources and Reference Material

Housekeeping

Upcoming Meetings and Events:

- RCC Meetings: Q3 – No Meeting / Q4 - December 1 & 2
- Leadership in Energy Efficiency Awards Ceremony – **December 4, 2026 - 9 a.m. – 11 a.m.**
 - Nominations open in August
- Stakeholder Satisfaction Survey coming in October 2026.
- Annual Committee Planning Survey coming on September 23, 2026.
- 2026 HPWH Consumer Marketing Campaign
 - Level Up advertising started in June!
 - Final insights to be presented to RPAC/+ at the Q3 Meeting
 - Any questions, please reach out to Britt Cutsforth Dawkins bdawkins@neea.org

New Homes Coordinating Workgroup:

- Information presented by Tess Studley and Sarah Widder from NEEA
- NEEA Workshop focused on:
 - Regional alignment on future measures and program scope/focus
 - **GOAL:** Get alignment on path forward for single-family New Construction programs in the region
 - Seeking input on NEEA's role and support
- Logistics:
 - Targeting week of Sept 14th for in-person/hybrid meeting
 - **ACTION:** Ask: Who from your organization should be involved?
 - If you have questions/comments, please reach out to Tess Studley tstudley@neea.org
 - Marshall Johnson: Andrew Shepard, Energy Trust Program Manager

Q4 Topic Check In – Retail Product Portfolio: Room Heat Pumps

Anne Brink, NEEA

Notes: Alexa Hujik

For this topic, we're planning on having Christopher Dymond talk to the committee about where NEEA is at with room heat pumps. He will be presenting at the June 23rd Product Council meeting about the energy modeling on room heat pumps. This will include any new products or technologies that are advancing the category, affordability, as well as any development of a QPL.

Approved: Brandon G, Mikayla B, John D, Jonathon B, and Griselda G

Introductions and Regional Roundtable –

Mikayla Bateman – Avista

- The Home Boost program, which is our DIY Home Energy Audit Pilot, has fully launched and there has been a lot of engagement. This has drawn a lot of attention away from our current in-person audit program as most if not all applications are currently for the DIY.
- Filed to suspend Idaho gas programs in Idaho last Friday. This would start at the beginning of 2027 and would include all gas projects in our Energy Efficiency portfolio with the potential exception of low income.

- Avista has signed an MOU with a large-load customer which has turned the conversation to data centers and the potential moratorium in the city of Spokane. Because of that, we have put a hold on our current outreach and marketing for EE.
- Q: Alisyn: When you say you're suspending your gas programs, is it both in WA and ID?
 - A: Just in Idaho and it's not quite official yet.
- Q: Marshall: What was the driving force behind suspending the gas programs in Idaho?
 - A: Cost Efficiency. Gas is just very affordable in Idaho for our residential customers, so we couldn't really justify keeping the programs,
- Q: Liz: Can you talk about your Energy DIY program? What were you doing before?
 - A: Before, we only had an in-person option where customers would apply and we would set them up with our auditing partner who would do the audit in person. Now, with the new pilot, we have the option for DIY with a company called Home Boost. They send customers a thermal camera that attaches to your smart phone. There are also instructions for what they are looking for during the audit as well as a list of photos to take of their home with the camera. These photos are reviewed through an AI program as well as certified auditors to get a full report back.
- Q: Brandon: Was Home Boost the same company who presented at Efficiency Exchange?
 - A: Yes!
 - From Chat: Jonathan - For those interested in Home Boost, I met Selina Tobaccowala, CEO/Co-Founder, at EFX. She is very approachable and willing to work with utilities. I encourage you to reach out to her.

Carolyn Beebe – Snohomish PUD

- Increasing our HP Dryer rebate from \$250 to 350 to match PSE. This will be great for our customers whose territory have a bit of overlap in gas and electric. We're currently seeing about 16% of our dryer rebates be heat pump dryers, so hopefully this increases it.
- Currently in the planning stages of how to message the federal program coming up to our customers. The IRA program coming to Washington State should be launching in the next few months, so we want to be sure our customers are aware of the rebates that they can use and where they are coming from. I think there might end up being confusion around the fact that they will need to work with the state for the IRA portion and with us for the standard rebates.
- Q: Jonathon B: Is NEEA planning on continuing to do any coordination around the federal programs through IRA now that they're kind of back on again?
- Carolyn: I am also interested in hearing what's happening in the other states since we only know what is happening in WA.
 - A: We haven't heard anything, but we can go to our policy team and get you more information.
 - **ACTION:** Alisyn from NEEA to ask Jonathan Belais about NEEA's current work with federal and IRA funding with all four states and share response with the committee.
- Q: Tess: Are these homes in the HEAR programs?
 - A: Yeah, I think they've changed the effort a couple of times. But yeah, it's the federal IRA money that's going through the states that this for Washington state anyways decided to run its own program and not run it through the utilities.
 - Tess: Okay, I do think that Oregon is rolling out a statewide program through the Oregon DOE. I feel like I heard an update about that. So, I do think it's coming.

- John Davey: We also heard from [WA Department of] Commerce that they are expecting movement from HOMES and HARP.
- Alisyn Maggiora: This update was shared at NGAC 2 weeks ago: [Home Energy Rebates Program | Department of Energy](#)
- Q: Todd Greenwell - have you seen the official documentation come out of the federal DOE with regard to what you're talking about, which is a 50122 home electrification appliance rebate program? That's the one that electrifies all the stuff in a house, not the HER Home Efficiency Rebate Program, but that 50122. I know they're saying information is going to be forthcoming because Oregon, I've been working with Oregon DOE on that one, but they're on hold now waiting for an official statement from the state and federal DOE.
 - A: I haven't heard anything about the whole home electrification. WA allows the customer to do electrification, but also you can just do upgrades on heating or appliances. But each state might be doing things differently. WA state is having the money "delivered", so its not something that we're concerned about being taken back.
 - A: Marshall – there was some revised guidance from the DOE. <https://content.govdelivery.com/accounts/USDOESCEP/bulletins/4199045>
 - A: Britt - This seems to be a good summary of the newly-named HEEHR changes effective at the end of May 2026. See the 3.3 ADVANCING AFFORDABILITY section: [program-notice-26-2](#)

Marshall Johnson – Energy Trust

- Energy Trust is one of the implementers in the state of Oregon for the Home Energy Rebate Funds. We are working with Earth Advantage, who is implementing the rebate funds in non-investor-owned territories, and Ever Blue, who is contracted with the OR DOE to provide a rebate management system that does income qualification. This is going to become the entry point for customers to access the funding. Our objective is that as these new funds come online, we won't be using utility funding to pay the full cost of heat pump water heaters and heat pumps and insulation, but that those funds would pay for the amount beyond what the utility has to pay for.
- We have been growing investments in no cost heating system, heat pump, water heater, and insulation upgrades, primarily for low-income customers. We've recently changed our thresholds for how we define low income to 80% of area median income. That's the income threshold that the Home Energy Rebate programs are utilizing. And so, we adjusted our program requirements to that.
- We have made changes to our HPWH incentive program. Currently DIY has a \$1,000 rebate and the distributor rebate is \$1,200. We have received feedback that no longer allowing new construction to qualify for the distributor incentive has caused some frustration. There seems to be a bulk sales discount through Home Depot that go to builders (\$800 HPWH in bulk) but we're not providing the rebates on those.
- Pacific Power is going to be transitioning some of their service territory to other utilities, and Idaho Power is selling a portion of their service territory that is located in OR.
- Q: Todd: I'm currently working with Earth Advantage on the implementation of the Inflation Reduction Act funds, but do you know offhand, are they going to give the green light then shortly to me? Also, are you going to offer the HER, the Home Efficiency Program, where you raise the

efficiency of the house 20%, or is it just the HEAR, Home Electrification and Appliance Rebate Program?

- A: Yeah, so there's two programs. One is the HOMES program, and that program is designed for two income thresholds below 80% AMI and 81% and above. And there are two increments in each income threshold for achieving 20% efficiency and 35% efficiency. And so I think in the higher up, it's like 2000 and 4000 for the higher income program and maybe 4000 and 8000 for the lower income program. You can stack the HOMES funds with the HEAR funds. But the HOMES funds require utilizing an energy model, calibrating the bills and overall a more extensive approach. The HEAR funding is more prescriptive. The money is in the IOU, basically Oregon got 110 million, split it in half, roughly half goes to IOU territory, half goes to non-IOU territory.
- Q: Brandon: You mentioned the Home Depot HPWH, we had a customer apply for a rebate which was \$800. Are you experiencing people just being able to go in and buy these in bulk directly from Home Depot?
 - A: We currently have a limit on what we will reimburse for sales to Home Depot, and that limit is 2. So, if someone did purchase a bulk order of five units, we wouldn't provide a discount on that. This is because we are largely targeting the DIY channel. It might be a SKU issue on the Home Depot side, but we are not providing reimbursements for those purchases.

Jonathon Belmont – BPA

- First, with the HEAR programs we were just talking about, I spoke with Earth Advantage yesterday about what they're doing with the COUs and it sounds like they are in the same position as Energy Trust. They are taking in the new rules that were released a few weeks ago and figuring out how to move forward. So we are in a hurry up and wait situation for Oregon.
- We have a mid-rate period IM [Implementation Manual] coming up in October, so we are working on a handful of new measures and different heat pumps to add to the portfolio. Also working with the RTF and NEEA to ensure we are regionally aligned.
- We are working on an induction cooktop measure and a handful of single family income qualified new construction measures to launch in October. Our team will be presenting these internally in a few weeks.
- Renewed our contracts for Comfort Ready Home, so we are excited about getting the fieldwork going.
- Q: Carolyn: Are there any plans for the all-in-one washer dryer to be separate from other measures?
 - A: Yes, we are working on having that up in October as well. Now, I know that the multiple configurations of an all-in-one or a heat pump dryer and a washer or it's we're trying to cover as many bases as we can.

Brandon Gee – Emerald PUD

- Pushing the HPWH program pretty hard and have done almost 100 since Jan 1st, 2026, through GP and a little through Home Depot as well.
- We capped our income-qualified program as we ran out of funding in March this year. Last year we lasted to October, but this is just showing us how much we need those funds. So we are hoping we can push the board to spend some in-house money.

- Received a weatherization grant for \$200,000, so it is limited to \$2k per home which we can use alongside the BPA funding. We have two years to spend the funds, but we are hoping to start this summer.
- Concerned about contractors finding out that there is additional money and raising costs, so we're going to be reaching out to them directly in hopes that our relationships with them will let them keep everything on the lower end.

John Davey – Puget Sound Energy

- Launched home energy assessment program for residential customers, which is picking up steam.
- New Measured Saving Residential pilot was launched. Goal is seeing cost using this is going to be more cost effective and possibly get increased savings for a real time QAQC?
- Looking into portable heat pumps to see if it would be appropriate for a pilot or a measure to help renters with EE instead of just landlords.
- Lastly, looking into auditor training with commerce too, to see if we can get some more home energy auditors in the region for the upcoming homes. Hopefully that launches.
- Q: Suzi – What was the technology that your measured savings pilot is geared towards?
 - A: We're working with Recurve to measure residential heat pump installation first and we're also working with Resource Innovations.
- Q: Marshall: For the measured savings, are you including fuel conversion? Can you also share a little bit about the home energy assessment and what tools you're using to collect data?
 - A: For measured savings, no, we are going off our existing electric heat pump measures. Electric forced air furnace to centrally ducted, electric forced air to ductless, zonal to ductless, and then heat pump to heat pump upgrades. We're using the same pathway for customers and contractors and then evaluating on the back end to get higher savings or deem exactly how measurable what we're going to pay an incentive to the contract.
 - For the HEA, it's an in-home, in-person residential program, pretty standard, being implemented by Franklin Energy. So, auditor goes in, gives advice, and collects information. Not doing blower doors or additional tools. They are using a digital data collection tool, but not a Snug Pro.

Griselda Gonzalez – PUD

- Increased rebates for HPWH from \$1,000 to \$1,300 and have seen a little uptick in DIY, but not in contractor installs.
- Rebates are still not fully launched for our Income Qualified Household program, but we are in contracting with a promise that they will be able to do income verification. We do have all the programs in place as far as what's going to be available to them and we are hoping to speak with contractors to make them aware of the program and let them know we can do slightly higher rebates to help customers make upgrades in their homes without increasing the cost of installation. Hoping for this to go live in July or August of this year.

Todd Greenwell – Idaho Power

- Idaho stakeholders got shut down trying to advance the 2024 ICC from the 2018 edition, even with the additional help from NEEA's Idaho Energy Code Collaborative team. And now there's

State government talk about putting all codes into statute, which could diminish the power the boards would have when turning it over to the legislatures. I'm not sure what all that means yet, but there's some bills being drafted now and we'll see where that goes.

- I'm working to introduce centrally ducted heat pump training into the training that the NEEA Idaho Energy Code Collaborative does. We do all the blower door training, duct envelope training, etc., but I want to get a module for our trainers to teach how to treat centrally ducted heat pumps correctly, the nemesis that we've got going on right now in the four state region. We're just trying to get it right with new construction.
- We are actively participating in the Northwest Marketplace. All measures have been chosen and we are just waiting on a final contract.
- I just had one ask, if anybody out there has worked with Power Badger. It's a diesel engine block, heater/preheater. Let me know, please, because we're talking with that company now and it's for the colder environments, but RTF has a measure on that, so we're looking into it.
 - Jonathon Belmont - Todd, you can contact Eric Mullendore at BPA about Power Badger. He's familiar with them. Ejmullendore@bpa.gov

Sarah Guenzler – Snohomish PUD

- We have a home energy audit pilot happening now, and we're hoping the IRA numbers coming out of WA will drive participation a little bit. It's a great program, but we're looking for a carrot at the end of a stick for our customers.
- Really interested in the DIY audits that Avista was discussing earlier. I don't know if that would qualify customers for the funding, but it's interesting they have moved from Auditor Certified audits to DIY almost entirely.
- Q in Chat: Sarah G – I would really appreciate any info from folks that are having success with home energy audit programs (especially successful marketing strategies). This is my first program, and I would welcome any fresh approaches I could take! Please feel free to shoot me an email: sjguenzler@snopud.com

Haley Puntney – Inland Power & Light

- We were also awarded some HEAR funding. We are still in the process of putting together what that looks like for us as a rural electric co-op. Hoping to target some homes that contractors are a little bit sparser in like Lincoln, Whitman, and Adams since they have fewer opportunities.
- Very excited to see what comes out of the October IM.
- SO many people are taking advantage of our Residential Home Energy Audit Program. The rebate programs we have set up are really taking off right now and we have a waiting list already in place for opportunities in our area. So, we are continuing to do great work with our low-income program or our income qualifying program as well.

Lis Saunders – Tacoma Power

- Mark Percy is retiring tomorrow after 40 years in conservation at Tacoma Power. We're going to miss him!
- We have a lot of hiring happening in customer energy programs right now, so that is where a lot of our focus is.

- We did get more funding from the State through a contingent award. We are doing an intake survey before we can get to the contract. And a portion of the award is for adult family homes, so we are going to see if we can get a few electrified.
- Moving ahead with the design of a DR smart thermostat program.
- Also, we are continuing to work on getting a list of contractors who will do income-qualified projects without overbidding. We have caps on our income-qualified programs and just about every project comes in at the cap, so just working to get the pricing in an appropriate range.
- Q: You coined a term, adult family home, what is that?
 - A: So in Washington, they have a definition of an adult family home, which is like a single family home, but it's a residential home that takes in up to six adults. Homes that offer room and board for people who cannot live independently. So not a full-fledged nursing home or assisted living facility, but something more community based. They are registered throughout the state.
- Q: Wondering about your smart thermostat program. Are you offering them for Heat Pump homes or just electric?
 - A: We are still in the early stages of the process, so I don't have enough information to tell you if it's going to include both or just one. But I will update as soon as we have it more fleshed out.

Suzi Asmus – NEEA

- We have the advanced heat pump coalition Q2 all member webinar coming up, so for those of you who would like to be involved, it is happening on June 30th at 10:30 a.m. PST. We're hearing from several coalition working groups: the roadmap and manufacturer engagement group, the heat pump only homes group and program managers.
- Working on some connected commissioning field demonstrations with the Daiken and Trane products that have connected commissioning capabilities . So we are gathering some field experiences, shadowing installers, and getting their take on the experience. Hoping to get some good case studies or field demo communication pieces out of this effort.
- There was a tier 2 memo about our current practice field study. We're working with Driftless Energy and the NMR Group to implement a field study. Hoping to do 500 online surveys and 100 site visits around the Northwest. I've started doing some direct outreach to some of you and your utilities, but we did put a brief pause on direct outreach as we have been reassessing our target areas based off of collected data. It looks like we will be starting recruitment for this in July of this year, so be prepared for me to reach out to you this summer.

Alex Merrill – NEEA

- Currently in the process of reviewing proposals for the Heat Pump Water Heater program's implementation work we put out a few weeks ago. Expecting to make a final decision in July and will share more in the Q3 update once that is completed.
- We have been having some great meetings with the HPWH workgroup. It was great to see a lot of people in person at our meeting ahead of EFX! We have our fourth meeting next week, which we are looking forward to and have created some strategy profiles based on the discussions so far about program approaches, considerations of roles and responsibilities, and some challenges and mitigation strategies related to each of those.

Anne Brink – NEEA

- ENERGY STAR®, as most of you probably know, is moving from the EPA to the DOE. They were supposed to have a plan in place by this time to make that transition. They have not announced anything yet. We did hear through the grapevine at Summer CEE that they are working on it and it's moving forward.
- We attempted to add Costco to our TV program, but with the amount of sponsors the program wants to support, we're not quite big enough for them to bring us on board and start working together. We will reach out again in 2028 once the ENERGY STAR market share has likely increased.
- We have started our big project on analyzing performance of refrigerators that have these advanced controls. So, it is adaptive compressors, but it's other controls that allow the refrigerator to adapt to different conditions. There is currently no test procedure to quantify those savings, so we're working on doing a test ourselves. We just started moving with this a few months ago, but I have included the information in the reports.
- Q: Todd G - I was just curious if they talked, about ENERGY STAR, and if you've heard the Feds extended the funding past the September fiscal that ends, the money they appropriated to run that thing for a year.
 - A: No, I have not heard anything about that.

Regional Priority Topic – Advanced Heat Pumps: Minimizing Supplemental Heat and New Measure Development Priority

Presented by Suzi Asmus, NEEA

Notes: Stephen O'Guin

As a follow up from the Q1 RCC priority topic, Suzi Asmus, NEEA's Program Manager for the Advanced Heat Pump (AHP) Program, led a discussion around regional efforts to address minimizing supplemental heat in heat pump systems and new heat pump measure development. The discussion around minimizing supplemental heat began with reflections on the May 2026 Efficiency Exchange heat pump sessions, including Heat Pump 101 and 201, and the regional representation at the NW Heat Pump Symposium the day before Efficiency Exchange. The several heat pumps sessions at Efficiency Exchange highlighted increased visibility and the importance of minimizing supplemental heat to the region.

Questions and Discussion During Efficiency Exchange recap:

- **Brandon Gee (Emerald PUD):** One thing that was surprising to me was that having no setback was better than having a setback. So just leaving the temperature, set it and forget it, was actually more efficient and would reduce the amount of supplemental heat coming on. So that was that was something that stuck out to me.
- **Todd Greenwell (Idaho Power):** I was really pleased with the attendance at the Heat Pump 101 and 102 sessions. We've been talking about the challenges of how contractors treat these products in the field. I think it's important for the region to realize we are starting to do something about it with this work that you're describing. Addressing this at EFX 26 was a starting point to get everyone talking. And I hope like crazy this begins to spill over into the contractors. That's a whole other area. But what we are doing behind the curtain is tremendous work. I think that installer networks are going to be shocked to hear what we have learned and

are working on with reducing electric resistance heat. We are doing something about this, so I applaud you. Thanks for doing this.

In addition, the NW HP Symposium focused on minimizing supplemental heat. The Symposium group met a year ago and formed three work groups, focused on Manufacturers, Contractors, and Consumers. These work groups shared on each of their group's developed resources including recommendations for manufacturer improvements, consumer messaging, and elements to include in contractor training. The goal of the Symposium is to have these resources distributed and implemented throughout the region with collaboration among manufacturers, distributors, and utilities.

Questions and Discussion During the NW HP Symposium recap:

- A quick poll in the chat identified Committee meeting attendees who also attended or participated in the NW Heat Pump Symposium: Brandon Gee (Emerald PUD), Todd Greenwell (Idaho Power), John Davey (PSE), Jonathan Belmont (BPA), Griselda Gonzalez and Josh Mitchell (Chelan PUD), Lonnie Junderson (Tacoma Power), and Andrew Shepard (Energy Trust)
- **Jonathan Belmont (BPA):** I have the consumer education materials and they're great. If you haven't seen them, I recommend you all take a look.
Building off of comments from Brandon and Todd, there's been a lot of new learnings about heat pumps. BPA has the high-performance high-capacity heat pump report that it's either out or is on the cusp of coming out. The setback learning, Brandon, was something we were surprised with as well. And it's a good example of a win that we need to change and turn into a win again. Decades and decades ago, we convinced everybody that doing the setback at night was a great thing. It was a great way to save energy. People slept well and we finally convinced everyone to do it. Now we have learned that that's not how best to use heat pumps. It was both surprising and it presented us with a new challenge: how do we now convince the entire population that we had previously convinced that you should have a setback not to have a setback anymore? And it's just one of the many things we all need to work with in the region. To many other people's point, it's good to hear about these conversations. The symposium was wonderful. Listening to the talks at Efficiency Exchange was great -
listening to the discussions and the presentations, including the heat pump 101 through the RTF - All of these things taken together do at least encourage me that we're all pointed in the same direction. And I think Todd said something about how we just need to keep working at it. You're right. We do need to keep working at it. But I think what Suzi is bringing up for everyone, and I hope everyone sees, is there's a lot of momentum really building region-wide in terms of the heat pumps that we're choosing, how we install them, how they're used, how we explain them to people, how we get more of them out into the market. I wish I had more answers than anyone else at this point, but I am confident and optimistic that we are all headed in the right direction. And as long as we have folks like Suzi, as an example, that are champions of this cause, I think we have a chance of actually getting something done.
 - **Todd Greenwell (Idaho Power):** I agree with you, Jonathan. I spent time with our codes training people for the state of Idaho. We spent four hours going over all the topics and new learnings we're talking about with heat pumps now, so they clearly

understand this is not an option. Applying heat pump technology has serious issues, at least, from what we've uncovered. And we have created a lot of it - we pushed 30 degree winter design temperatures for 15 years. Now we're talking about going to the 99 percentile. That's wild in the mind of a contractor. And same time with setbacks guidance's. Some people like it cold at night. So how are we going to convince them to stop setting their thermostat back at night? All our literature at Idaho Power says if you're going to do a setback, limit it to one or two degrees. Now we're going to say don't setback at all. But I think collectively that's the education we want to reteach. Technology is changing rapidly and access to information is everywhere so in some ways, we're losing control. We have smart controls and we have AI coming in and we're going to have less and less control over what we would like to happen with these products, including smart thermostats and heat pumps. So we have probably three or four years to even have influence on how these systems decide how they're going to operate, let alone algorithm decision making. But it is good that we're making it an issue that people need to pay attention to. We used to just deal with it and put things in literature. But Suzi, your work group's consumer messaging deliverables were well done. They got all the right messaging and we'll use them in trade shows and other areas to get something in the hands of people, because there's a lot of power in that.

- **Suzi Asmus (NEEA):** I do want to say that Doug Stoeckicht from Tacoma Power was the marketing person that really came up with the consumer messaging visuals. They are AI assisted but Doug was the guiding hand. And thank you, Liz, for allowing him to spend his time on that. We were really pleased with what he did.
- **Todd Greenwell (Idaho Power):** The artwork on those resources is brilliant. It didn't look like just another boring text sheet. They are really engaging. The retro looking version is just artistic. I think designs like that are the draw to make people read this kind of information, because they don't see a sheet like that very often.
- **Brandon Gee (Emerald PUD):** I also have those materials. Adding to what Todd said, a lot of people like a setback at night for comfort to sleep. At the Symposium, Christopher Dymond said to just open a window for cooler bedroom temperatures at night. That was something that I took away as well. You can crack a window in your bedroom, as long as the thermostat's not in your bedroom, and your heat pump is really not going to be running much more but it'll eliminate the supplemental heat from coming on in the morning, which is what we don't want. This is something I plan to personally test this winter so I can speak to it with my own experience and say this really works.
 - **Jonathan Belmont (BPA) in chat:** Shut your bedroom door and open a window. Leave the temperature alone.
 - **Britt Cutsforth Dawkins (NEEA) in chat:** I agree with Jonathon--we open a window for the extra cooling at night and don't touch the thermostat.
 - **Griselda Gonzalez (Chelan PUD) in chat:** Would this cause the heat pump to work harder? That's always been my question.
 - **Jonathan Belmont (BPA) in chat:** Yes, but minimally. You'll basically ask the HP to bring a smaller space (bedroom) up to temperature vs the entire house in the morning. It's a tradeoff.

- **Suzi Asmus (NEEA):** We have received some really great feedback on the consumer materials. For example, with the ‘set it, bump it, trust it’ tagline, we heard we may want to change the order to start with trust it and leave it alone without messing with the thermostat. And then if you need to, only bump it. We also heard back at the symposium that the three work groups don't have all of our language aligned in our materials. So that's part of what we're doing right now: reviewing all the materials and making sure that the content and the language is aligned as far as what the setbacks should be. One work group said “one to two degrees”, another group said “two to three degrees”. So we need to align on that. I don't know if any of you have messaging that you're already working with in your organization about if you must, what the maximum setback is. I think that RTF is including no more than 2.9F. So if you have, if your organization wants to weigh in on that, please do so. We are still taking input and feedback on these materials. And then the installer content also is going to be really, really important. We have an outline and a large set of slides that we will share with everyone. Please give any feedback on those because what we want is for this content to be used around the Northwest by all of the distributors so that everybody's hearing the same thing and using the same.
 - **Brandon Gee (Emerald PUD) in chat:** We message no more than a 2 degree setback.

The discussion around new measure development focused on NEEA’s updated draft Advanced Heat Pump System Specification, and discussing recent activity at the Regional Technical Forum (RTF) to develop their new and updated heat pump measures, and concluded with comparing the two similar specifications.

Questions and Discussion During the NEEA specific and RTF new measure development recap:

- **Marshall Johnson (Energy Trust):** Are the proposed specification requirements something that contractors or distributors can easily identify (i.e., know which models qualify), or will additional work be needed?
 - **Suzi Asmus (NEEA):** Some of the specification criteria can be identified today using existing tools (like NEEP databases), but not all. Improving access to and clarity of qualifying equipment data is an ongoing effort, and better visibility and data infrastructure are still needed.
 - **Christopher Dymond (NEEA):** NEEA is working with NEEP to establish a user filter on the database that will provide a list of qualifying heat pumps (est. Q4 2026). An interim thermostat identification path will likely be needed outside of the NEEP database until CEE completes their thermostat specification update (est. Q1 2028). NEEA will also provide a qualified product list for those heat pumps capable of onboard “connected commissioning” should utilities wish to leverage that in their programs as well (est. Q2 2027).
- **Todd Greenwell (Idaho Power):** In 2021-2022, when the RTF dropped the savings on centrally ducted heat pumps by about 30 to 40 percent, that put me on the edge where these measures are barely cost effective- barely teetering on a 1 with a utility cost test. So this specification is not a luxury and it's not an extracurricular thing that we need in the field. It is a measure we need, in my opinion. I have 120 HVAC contractors that report to me on my program, but it may only be for 10 or 15 of them that will say, I can do this, Todd. I'm going to have to meet with all

the other companies and talk to them one-on-one with the owners to ask 'what are you willing to do'? But I will do this because the added kWh savings will potentially afford me the ability to change the compensation structure. I may be able to amend our incentive structure to support installs and change contractor behaviors too. Since we dropped PTCS in, April of 2020, when we dropped the CCS, the controls commissioning and sizing, contractors have been able to install how they would like to without the adequate calculations. This specification allows us to recapture their attention and affect their practices. I will say one thing just to credit Christopher and the HVAC subcommittee manager of the RTF. Christopher does have common sense in knowing when to push back on a rabbit hole that we potentially go down in these RTF meetings. Like what's the existing infiltration rate, the ACH 50 or the existing duct leakage? to pre-qualify a house. And right away he says, folks, contractors are not going to do this. So he's been able to help regulate the conversations to where it's been pretty practical from a contractor standpoint, in my opinion, but so I'm hopeful. Forget modeling. This is all about real world and what's been happening.

Thanks.

- **Stephen O'Guin (NEEA):** Why is the capacity ratio the only thing highlighted yellow on the specification?
 - **Suzi Asmus (NEEA):** It was initially 70%. Christopher recently tweaked it to 65% to align with the CEE tax credit for heat pumps in heating climates. And I wanted to call it out because it still says 70% on page two of the specification that I sent out so we need to fix that. But 65% is the current proposal. (Note: An updates version accompanies these meeting notes.)
- **Brandon Gee (Emerald PUD):** Regarding part of the specification about reducing electric resistance back up heat, we've been talking about this for years now at EPUD. The challenge has been getting the contractors to be willing to do what you're asking them to do. And I think that that's where we're going is limiting supplemental resistance heat to 5kW max or there won't be an incentive. And then maybe having something like what Todd mentioned earlier: you don't install backup heat, then the contractors could have an incentive for the extra risk. You're going to have to do a load calculation. You're going to have to maybe do a blower door test and just do a better job overall. And then we're going to pay you to do that. I'll keep everybody updated as to actually what we do, but we're looking at making this change in 2027.
 - **Suzi Asmus (NEEA):** That's another great point that Christopher has been making with starting with 5kW in this specification, and then going to zero kW in the future. We're not requiring a contractor to do a load calculation with this or that software, or that you have to do a blower door test, but contractors will have to do some type of load calculations and size correctly in order to feel comfortable with the 5k that they put in. So, it's fewer check boxes and the utility doesn't have to go out and confirm the numbers, confirm that they did the sizing, but the installer won't be successful if they don't figure that out and take those steps themselves. This is the thinking.
 - **Jonathan Belmont (BPA):** Just to follow up on what Brandon said, I don't think it's my opinion alone, but I also look at the potential of paying installers to put in a limited amount of backup heat really as risk mitigation. I know I have heard that one of the reasons installers are going to put in more backup heat than they need is because they're less likely to have to come back out if the heat pump isn't doing exactly what the homeowner wants. And so the consumer marketing material, the 'set it, bump it, trust

- it', that's what it is - there is a trust element that these installers have to have with their installations and the system functioning. I mention this when I talk to installers because I think it's important to acknowledge that they are taking a risk if they do. I think studies like NYSERDA and others are going to show that they'll be rewarded for taking that risk, but it's still a risk on their part. So, it's not just asking them to do load calcs, asking them to size correctly, asking them to do the things we know that they should be doing. It's asking them to put their dollars, their business, on the line to a degree. And I think that's something we can acknowledge and really call out that it's worth their trust.
- **Marshall Johnson (Energy Trust):** Suzi, on the 'not bad ducts', the first two tests [1. Confirm heat (or cooling) airflow at each register and 2. Ducts are fully insulated where outside conditioned space] seem relatively reasonable for an installer to conduct, but the third one [Duct leakage $\leq 15\%$] seems more challenging. I wonder if you think there might be opportunities where you have income qualified programs or where you're paying the full cost of equipment where you can make people do things that you can't get them to do otherwise. I understand ducts are really important to distribution, but I also wonder: Is it realistic to have a duct leakage limit and how do you enforce that?
 - **Suzi Asmus (NEEA):** Part of the thinking is you don't want to have egregiously leaky ducts. And if you do some level of duct leakage measurement and you realize that the ducts are leaky, you either don't get a centrally ducted heat pump or you get a multi-head, whole home system. If they are bad ducts, you should consider an alternate route. I can't answer your exact question regarding the mechanism of measuring it and how accurate does it need to be, that is something Christopher Dymond would have to speak to.
 - **Marshall Johnson (Energy Trust):** It makes sense from a spec perspective. It's just really challenging in practice. Maybe in new construction, you have infrastructure that can do that. And in some programs where there's an enforceable requirement for the equipment to do that. But PTCS isn't around as was discussed. There just isn't a lot of infrastructure to reinforce the duct leakage testing.
 - **Lis Saunders (Tacoma Power):** How does the RTF specification differ from NEEA's draft Advanced Heat Pump specification?
 - **Suzi Asmus (NEEA):** NEEA's spec focuses primarily on equipment characteristics. RTF's spec includes additional elements such as installation practices, controls, and operational factors. RTF's version supports utility savings attribution and verification, while NEEA's version supports manufacturers and utilities by providing a roadmap of heat pump systems criteria that balance the interests of customers and the grid. [Post-meeting clarification for the record: However, we are working to stay aligned on metrics wherever possible.]
 - **Todd Greenwell (Idaho Power):** I think the RTF inherently knows what impacts savings and they inherently know what has to change in order to deliver meaningful kWh energy savings. There's never an end to tweaking a spec. The RTF did identify additional research that needed to be done at any component of the initiative. And then they'll move into modeling this spec and see what it comes up with. I realize this is not going to be for everybody. You may get one out of 10 contractors that want to meet the spec, that even understand it. There are some who understand it and don't want to do it. So the onus is on the program managers. Back in the day we had the boardroom attention from the contractor networks. They did exactly what we

wanted. They were in all the trainings. I still require PTCS. I never relinquished that. I think we might be the only utility that still requires it, but every one of contractors do a manual load calc. You change the winter design temperature from 30 down to 9, away you go. But a lot of this work at the RTF is to minimize the size of the heat pump because ultimately you've got to install the duct system. And if you put a big heat pump in that house that didn't exist before you may choke off the air flow. So a lot of the duct specifications or even infiltration have to do with trying to minimize the size of that heat pump because the ducts are too small. So when we talk about 10% leakage based on square footage, there are other ways a contractor can make estimate good, better, best just visually. Those folks see this every day. They know what a good, better, best is for anything in those homes. So I hope they go that way because nobody is going to do a duct blaster test to measure existing duct leakage. It's a deal breaker with most contractors, let alone a blower door for Infiltration. They know what has to be delivered in order to deliver meaningful savings. Contractors have got to be on their game.

Meeting Recap, Next Steps:

Upcoming Meetings and Events:

- Upcoming RTF Meeting, June 24th – NYSERDA and Efficiency Main are both presenting on what they are currently doing in cold climate work.
- RCC Meetings: Q3 – No Meeting / Q4 - December 1 & 2
- Leadership in Energy Efficiency Awards Ceremony – December 4, 2026 - 9 a.m. – 11 a.m.
 - Nominations open in August
- Stakeholder Satisfaction Survey coming in October 2026.
- Annual Committee Planning Survey coming on September 23, 2026.

One thing you learned/appreciated from today's meeting?

- **Anouksha and Suzi:** We appreciate you all for being here and actively engaging.
- **Brandon Gee:** As far as the heat pumps and the installations that we went over at the exchange, it was it was nice to recap everything and have it fresh in my mind again.
- **Mikayla Bateman:** I appreciate all the knowledge you all have to share!
- **Britt Cutsforth Dawkins:** I learned how special the Northwest is to so many of us!
- **Lis Saunders:** That Alaska is a go to for the summer!
- **Marshall Johnson:** Set it. Bump it. Trust it.
- **Griselda Gonzalez:** Appreciate the expertise and sharing of information.
- **Todd Greenwell:** There is increasing focus by all on the regional key issues that are common to all for the future.
- **Stephen O'Guin:** I appreciate all the travel destinations I need to check out in Summer!
- **Jonathon Belmont:** I appreciate all your efforts. The region, and our customers, are all better off for it.
- **Stephanie Quinn:** I really appreciate an active discussion - thanks to the committee for chiming in and keeping these conversations lively.