

Regional Portfolio Advisory Committee



DATE: Tuesday, September 1, 2026

TIME: 12:30 – 4:00pm Pacific

LOCATION: Virtual via Microsoft Teams

WEBINAR: [Click here to join the meeting](#) (Meeting ID: 244 828 967 153 474 | Passcode: 9X4j7hF6)
(if needed) Call-in audio only: 971-323-0535 | Phone Conference ID: 996 311 230#

AGENDA (All Times Pacific)		Topic Owner	Page #
12:30-12:40 (10 min)	Welcome, Agenda / Packet Review	Alisyn Maggiora	1-2
12:40-1:55 (75 min)	Introductions + Committee Round Robin General highlights: Big changes (programs/personnel); current challenges, lessons learned; how utility activities relate to NEEA's; sharable tools/materials; policy directives w/ customers; findings, filings, IRPs. <i>Desired Outcome: Committee members and NEEA staff are aware of latest activities, plans, and organizational updates from alliance members.</i>	All RPAC Members	
1:55-2:05 (10 min)	Housekeeping and Looking Ahead • Updates ○ Tier 2 memos check-in • Announcements & Reminders ○ 2027 Operations Planning Process & Webinar (Oct 15) ○ New & Manufactured Homes Webinar (Sept 14) ○ Leadership in EE Awards (Dec 4) ○ Stakeholder Satisfaction Survey (Oct) ○ Proposed 2027 RPAC dates, remaining 2026 NEEA meetings ○ Industry Events <i>Desired Outcome: Committee members aware of recent developments and upcoming topics for engagement.</i>	Alisyn Maggiora Emily Moore	3
10 min	BREAK	All	
2:15-3:00 (45 min)	*Milestone Vote* Efficient Fans Program • What does Program Advancement mean? • Summary of funder feedback • Vote for "Program Advancement" milestone <i>Desired Outcome: Committee members are aware of any changes to the milestone document to reflect funder feedback and are supportive of the Efficient Fans advancing to Market Development phase.</i>	Emily Moore Alexis Muench	4-25
3:00-3:55 (55 min)	[RPAC+] Heat Pump Water Heater (HPWH) Marketing • Results from the downstream 2026 HPWH Level Up Campaign <i>Desired Outcome: Committee members understand the results of the latest HPWH consumer campaign and gain context around state-by-state, rural/urban, and English/Spanish audience engagement.</i>	Britt Cutsforth Dawkins	26-27
3:55-4:00	Wrap-Up & Adjourn	Alisyn Maggiora	

Informational Updates

- **Page 28-29:** 2026 Stakeholder Satisfaction Survey
- **Page 30:** Program Expansion Update: Advanced Performance DOAS (gas)
- **Page 31:** Heat Pump Water Heater Work Group Update
- **Page 32-33:** Q2/Q3 Electric Committee Highlights
- **Page 34-45:** Q2 2026 Market Progress Report (Gas + Electric Programs – Progress toward annual goals)

Additional Reference Materials:

- **Committee Meeting Materials & Charters:**
Please review the committee updates on pg.31 for a recap on recent and upcoming committee activities/topics. Links to recent meeting materials are provided there.
 - Most recent meeting notes, slides and agenda packets available on neea.org [here](#).
 - Charters: [RPAC](#), [CEAC](#), [RETAC](#), [Coordinating Committees](#)
- **Latest Functional Newsletters** (Emerging Tech | Market Research & Eval | Codes, Standards, New Construction): <https://neea.org/resource-type/quarterly-updates/>

2026 RPAC Meeting Dates:

Quarter	Day(s)	Date(s)	TIME (Pacific)	LOCATION	KEY TOPICS / NOTES
Q1	Tuesday	Feb 10	9am-4pm	Hybrid	• Fans program refresher • Portfolio updates (2026 plans) • HPWH marketing campaigns: 2025 results & 2026 proposal
Q2	Tuesday	May 19	9am-4pm	Virtual	• Annual portfolio review (savings + risk) • Program expansions • Efficient Fans program deep dive (vote prep) • HPWH 2026 marketing campaign <i>*elections*</i>
Q3	Tuesday	Sept 1	9am-4pm	Virtual	• Efficient Fans <i>*vote*</i> • Results: HPWH 2026 marketing campaign • Review proposed 2027 RPAC meeting dates
Q4	Monday	Nov 2	9am-4pm	Virtual	• Draft 2027 Operations Plan Feedback Reminder • National DOE Cost-Effectiveness & 2024 IECC • NW Online Marketplace Update & Utility Sites • NGAC Vote Updates (program expansions)

Proposed 2027 RPAC Meeting Dates

Quarter	Day(s)	Date(s)	TIME (Pacific)	LOCATION
Q1	Wednesday	Mar 3	9am-4pm	Hybrid
Q2	Wednesday	May 5	9am-4pm	Virtual
Q3	Tuesday	Aug 17	9am-4pm	Virtual
Q4	Wednesday	Nov 10	9am-4pm	Virtual

Memorandum – *Agenda item (Tier 1)*



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Moore, Director, Market Strategy & Execution

SUBJECT: 2027 Operations Planning Process



Brief Overview:

NEEA staff have begun developing the 2027 Operations Plan and want to ensure RPAC members are aware of the process and the upcoming timeline for stakeholder engagement and feedback.

The 2027 process and Operations Plan deliverable will be very similar to years past and will culminate in Board approval at the December 8th Board meeting.

Here are the key dates for stakeholder review of the Operations Plan that RPAC members should be aware of:

- 10/8: Draft 2026 Operations Plan shared with regional stakeholders
- 10/15: Webinar meeting held to review the draft Operations Plan
- 11/2: Feedback is due to NEEA

In the Q3 RPAC meeting, we'll review the timeline and preview any expected changes or milestones in the 2027 plan. Please raise any questions you have at the meeting and/or contact [Emily Moore](mailto:emoore@neea.org) (emoore@neea.org).

Memorandum – *Agenda item*



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Alisyn Maggiora, Sr. Stakeholder Relations Manager

SUBJECT: RPAC Vote on Efficient Fans ‘Program Advancement’ Milestone

Our Ask of You:

Please review this refresher on the RPAC voting process and come to the September 1 RPAC meeting prepared to vote on the Efficient Fans ‘Program Advancement’ milestone, which marks the program’s transition from the Program Development phase to the Market Development phase of NEEA’s initiative lifecycle (diagram below).



Refresher on RPAC Voting Process:

The process is detailed in Addendum A of the [RPAC Charter](#); in summary:

- A roll-call vote will be taken at RPAC and full consent must be reached by those casting votes for a NEEA program to advance.
- An RPAC Member may register their vote as follows:
 - A ‘Yes’ vote may be registered during the meeting by the RPAC member or an appointed delegate, or may be submitted in writing to NEEA staff in advance of the meeting.
 - A ‘No’ vote may be registered during the meeting by an RPAC member; an RPAC member voting ‘No’ shall identify their concern and propose a solution they feel addresses the concern as well as the viability of the NEEA market transformation effort.
 - Other:
 - ‘Abstain’ – An RPAC Member may choose to abstain as a means of registering a neutral opinion or dissent without voting ‘No’.
 - ‘Present, Not Voting’ – An RPAC Member who is present may choose not to vote as a means of remaining neutral on a program’s advancement.

For any questions on the voting process, please contact [Alisyn Maggiora](#). For any questions on the Efficient Fans Program Advancement milestone document (sent to RPAC on July 21) please contact [Alexis Muench](#) and copy [Emily Moore](#).

Appendix to Efficient Fans Program Advancement Proposal: Funder Questions on Program Proposal and NEEA Responses

Initially delivered to RPAC members 7/21/26 with Milestone Document for review

Final version delivered to RPAC members 8/25/2026 in preparation for 9/1/2026 milestone vote

Thank you for your organization's review and feedback on the Efficient Fans Program Proposal Preview, shared in the Q2 RPAC meeting. The dialog we've had so far with your teams has resulted in rich Q&A. For anyone interested in a summary, we've packaged the questions received and NEEA's responses below.

Please review and reach out to Alexis Meunch, ameunch@neea.org, with any concerns or follow-up questions. Your input is crucial to informing the Efficient Fans Program Advancement proposal. The Program Advancement vote is scheduled for the September 1 RPAC meeting.

	Date Received	Source (Person, Org.)	Question	NEEA Response
1	2/10/26 RPAC Q1 Meeting	PGE	Curious about consultants in this space? An ESCO?	The Efficient Fans program is focused on market audiences that have the greatest opportunity to influence the adoption of efficient fan models. The audience currently includes manufacturers, manufacturer representatives, and specifiers. Our research indicates interventions with these roles can have the greatest impact on design and fan selection decisions. We will continue monitoring audiences and evaluating opportunities to engage with additional market actors, including ESCOs, where appropriate.
2	2/10/26 RPAC Q1 Meeting	PGE	Is there a threshold or hurdle established as a minimum for what megawatt average needs to be to pursue new ideas?	No. There is currently no hardline aMW threshold. While opportunities in the minimum 50 to 100 aMW range are more highly considered, NEEA also considers factors such as market transformation potential, portfolio balance, strategic fit, and regional value when evaluating new initiatives. Resources are then scaled to the size of the opportunity.
3	6/23/26	SnoPUD	Clarification about what the MT effort/goal is?	The program goal is to increase the efficiency of fans sold across the Northwest. To do this, we plan to boost market awareness of the Fan Energy Index* (FEI) through education and engaging our target audiences during their design and specification process, before equipment is purchased downstream.
4	6/23/26	SnoPUD	What is the emerging tech that will be deployed? What's the convo w/ MFRs to help move that needle? Is the ultimate goal	The program does not promote a specific fan type, configuration, or brand. Instead, it focuses on increasing the awareness and use of FEI as the standardized metric to support optimized fan selection and system design across a wide range of applications. By encouraging the selection of the right

Date Received	Source (Person, Org.)	Question	NEEA Response
		to get this codified? Or getting utilities to try to quantify savings?	fan, motor, and controls for each operating condition, the program aims to improve overall fan efficiency and energy performance. NEEA also seeks to support broader market adoption of FEI through opportunities to help shape state energy codes, where appropriate. Additionally, we aim to generate the evidence needed to help utilities recognize efficient fans as a proven measure for energy-efficiency programs.
5	6/23/26	SnoPUD	Is there any certification or other approach to demonstrate success in adoption (for M&V purposes)? Yes. Fans included in the program are expected to be certified by Air Movement and Control Association International, Inc. (AMCA International) and meet the program's minimum FEI qualification of 1.05. However, because FEI is calculated at a fan's specific operating point, certification alone does not demonstrate market adoption or savings. NEEA will assess adoption using the market progress indicators identified in the Efficient Fans logic model. These indicators will be assessed through Market Progress Evaluation Reports and help track changes in the specification, selection, and purchase of higher-FEI fans. Evidence may include manufacturer and representative sales data, changes in FEI distributions, specification practices, designer and market-actor surveys, and representative installation modeling. These findings will also support verification and continued advancement of the existing RTF measure. Note: AMCA International-certified fans are independently tested and have catalog and software ratings checked by internal staff. Certified fan models undergo check-testing every three years to ensure consistency of their ratings. A list of AMCA International-certified fans is available at www.amca.org/find-fei/.
6	6/23/26	SnoPUD	What percentage of fans out there (of the 20,000) already have a drive? Do you have this data? Currently, NEEA does not have sufficient data to estimate the percentage of fans that include variable frequency drives (VFDs). Available information from the U. S. Department of Energy (DOE) and NEEA's Market Characterization research DOE Technical Support Document, Resources - Northwest Energy Efficiency Alliance (NEEA) distinguishes between belt-driven and direct-drive fans but does not identify VFD adoption. As the program develops, NEEA will

Date Received	Source (Person, Org.)	Question	NEEA Response
			continue working with manufacturers and other market partners to address this data gap.
7	8/3/26	Energy Trust	Are the savings that NEEA has identified “co-created savings” and does NEEA have a perspective on when an efficiency acquisition organization might play a role to incentives widespread market adoption? Yes. The forecasted savings are co-created savings because they represent market changes above the naturally occurring baseline that result from NEEA’s work with funders and market partners. They are close to total regional savings because very little natural market movement is currently expected. To avoid double counting, any overlapping savings from Energy Trust or other local program of consumer or market partner efforts would be accounted for when calculating NEEA’s net market efforts. Acquisition incentives could become valuable when the measure is sufficiently established and where they can overcome first-cost barriers or accelerate widespread adoption. NEEA is interested in coordinating with local programs on the appropriate timing, eligibility criteria, and the division of roles.
8	8/3/26	Energy Trust	What is the breakdown of potential between new construction and existing unit replacement? Based on the current program savings analysis, approximately 67% of the savings potential is associated with new construction, 21% with planned replacement of existing units, and the remaining 12% with emergency replacement. Together, planned and emergency replacements represent approximately 33% of the total potential.
9	8/3/26	Energy Trust	How does NEEA expect to work with local programs? NEEA expects to work with local programs by sharing market intelligence and manufacturer data, coordinating outreach and education, and identifying where acquisition activities could complement NEEA’s market-transformation interventions. NEEA’s initial focus is on manufacturers, manufacturer representatives, and specifiers, particularly improving FEI visibility in selection tools and influencing specification and selection practices before purchase. As the market develops, NEEA and local programs can coordinate incentive timing, eligibility criteria, market-actor roles, attribution, and data collection. This coordination would help local programs accelerate adoption while avoiding duplicative activities or double counting of savings.
10	8/3/26	Energy Trust	Is FEI a specification for an individual fan, or is it a specification for fans working together in a system? FEI is generally calculated for an individual fan at a specific operating or duty point. It accounts for the combined energy performance of the fan, motor, and complete drive module (CDM), when one is included. The CDM includes the variable-speed drive and associated components or sensors. Because FEI is

Date Received		Source (Person, Org.)	Question	NEEA Response
				duty-point-specific, the same fan can have different FEI values under different airflow and pressure conditions. AMCA 208 provides a methodology for calculating a fan array-level FEI. FEI does not, however, measure the efficiency of the entire air distribution system. System design factors, including duct configuration, pressure losses, controls, and operating schedules, also affect overall energy use.
11	8/3/26	Energy Trust	What price deltas are there between efficient fans and non-efficient fans?	There is not a single, consistent price difference associated with achieving a higher FEI. In many applications, a higher FEI selection can be achieved with little or no incremental equipment cost by selecting a fan that is better matched to the required duty point. In other applications, achieving a higher FEI may involve a larger fan, a more efficient impeller, a higher-efficiency motor, a different transmission type—such as direct rather than belt transmission—or the inclusion of a complete drive module for variable-speed control. The resulting cost difference therefore depends on many variables, including the fan type, size, airflow and pressure requirements, space and sound constraints, motor and transmission configuration, and whether a complete drive module is included. NEEA is working with manufacturers and representatives to better understand these price relationships across common applications and FEI ranges.
12	8/3/26	Energy Trust	Is NEEA expecting to provide incentives to upstream or midstream actors?	NEEA is currently testing targeted incentives with manufacturer representatives, including participation bonuses intended to support engagement and accelerate higher FEI fan selections. The program is also evaluating whether a per-unit incentive tied to FEI and fan characteristics could be workable. However, NEEA is not currently committed to a broad upstream or midstream product-rebate model. Any expanded incentive approach will depend on available sales data, in-the-field observations, and whether eligibility and savings can be defined reliably for application-specific fan selections.
13	8/13/26	NWE	Are there any strategies NEEA is exploring to ensure reach into more rural areas?	NEEA’s upstream and midstream strategy is designed to broaden reach through manufacturer representatives and specifiers with existing local

	Date Received	Source (Person, Org.)	Question	NEEA Response
				relationships. In Market Development, NEEA will prioritize reps with broad geographic coverage, offer virtual training, and leverage utilities and industry associations for local outreach. While rural areas have fewer commercial and industrial fans than urban areas, these approaches will help ensure that rural markets are included where relevant opportunities exist.
14	8/13/26	NWE	Can you clarify the timeframe for funding the investment of \$8.1 million? And is this included in current funding?	The estimated \$8.1 million is for the Market Development phase of the program, expected to be over approximately 10 years. The Efficient Fans program was included in the portfolio and budgeting for the Cycle 7 business plan, and is accounted for the existing electric program portfolio budget.
15	8/18/26	BPA	What is the horsepower range for fans in your program?	The program focuses on fans ranging from 1 to 150 horsepower. The RTF measures generally apply to fans in the 1 to 70 horsepower range, based on the applicable test method.
16	8/18/26	BPA	Are fans embedded in larger HVAC systems eligible for the program if fan energy is not included in the equipment COP rating or applicable efficiency standard?	The program includes standalone fans and those embedded in larger equipment when the fan's energy use is not captured by the equipment's overall efficiency rating or applicable standard. Highly specialized applications or fans outside the program's size and product scope may not be included.
17	8/18/26	BPA	How does the estimated 110 aMW of combined commercial and industrial technical potential translate to approximately 30 aMW of program savings over 10 years?	Technical potential represents the savings that could theoretically be achieved across all applicable commercial and industrial fans, with most of the opportunity coming from the industrial sector. The program forecast is lower because it reflects the portion of the market NEEA expects to influence through its targeted interventions and removal of identified market barriers. NEEA will continue refining the forecast as additional market and sales data become available.
18	8/18/26	BPA	How does the program approach data collection?	The program will collect data from manufacturers and manufacturer representatives and supplement it with available third-party and industry sources. NEEA will analyze and share market trends with participating partners to demonstrate the value of continued data sharing and encourage broader participation. The strategy will be refined as additional data becomes available, particularly as the industry adjusts following the withdrawal of federal fan-efficiency rulemaking.
19	8/18/26	BPA	Does the industrial estimate include agriculture?	No. FEI applies to commercial and industrial fans, while the agricultural sector primarily uses air-circulating fans (ACFs), which are evaluated using a different efficiency metric. The program is not currently focused on ACFs.

	Date Received	Source (Person, Org.)	Question	NEEA Response
20	8/18/26	BPA	Will Motor Stock assessment inform the estimate of savings or market size?	The assessment may provide additional context on the types and sizes of motors used in industrial fan applications, but it is unlikely to provide enough fan-specific detail to materially change the program's market-size or savings estimates. NEEA will review the findings and consider whether they can support future refinements to the savings forecast or the RTF's development of utility measures.
21	8/19/26	NWPCC	The Council supports the program and agrees that the savings potential is significant. The program's savings estimates are lower than those in the 2021 Power Plan. Is this difference primarily due to the program's narrower definition of standalone fans?	Thank you for the support and for noting the difference from the Council's estimate. We agree that the lower savings estimate is likely due, at least in part, to the program's narrower focus on standalone commercial and industrial fans. The 2021 Power Plan evaluated a broader set of fan applications and used different scope and modeling assumptions. NEEA will continue sharing market and program data to help refine and align regional savings forecasts as the program advances.



Efficient Fans:

Program Advancement Proposal

8/25/2026: Final version for Vote; no changes made from July 18 version



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Executive Summary

Commercial and industrial fans and blower systems represent a significant regional energy opportunity, accounting for approximately 839 average megawatts of regional load, with an estimated technical achievable potential of 114 aMW through increased adoption of higher-efficiency fan systems. The program focuses on standalone Fan Energy Index (FEI)-rated commercial and industrial fans, using FEI as the primary system-level efficiency metric to improve fan and blower selection practices across the market. Program Development phase (refer to Initiative Lifecycle diagram on page 1) activities confirmed that fan selection decisions are heavily influenced during the design and specification phase and that low awareness of FEI, limited understanding of the value proposition of efficient fans and blowers, and limited integration of FEI into standard workflows remain key barriers to market adoption of higher efficiency fans.

The investment rationale for advancing to the Market Development phase is based on validated market learnings showing that meaningful market change is achievable through coordinated intervention across manufacturers, manufacturer representatives, specifiers, and industry organizations. Program Development demonstrated growing industry awareness and engagement around FEI, validated manufacturer representatives as key for influencing specifiers, and confirmed that improving FEI visibility alone is insufficient without broader education, value proposition development, and market engagement. The program has also strengthened collaboration with Air Movement and Control Association (AMCA) and other industry stakeholders to support longer-term alignment through education, standards, and codes activities.

In Market Development, the program will shift from validating strategies to scaling coordinated market interventions designed to transform fan selection practices across the commercial and industrial market. The program's objective is to increase the market share of higher-efficiency fan systems by reducing the prevalence of low-FEI fan selections, embedding FEI into standard specification and procurement workflows, and increasing the consideration of lifecycle value during fan selection decisions. Near-term efforts will focus on “raising the floor” by reducing low-efficiency selections that represent the greatest remaining savings opportunity, while also supporting broader adoption of higher-efficiency fan and blower systems over time. Planned interventions include: improving FEI visibility within selection software, supporting manufacturer representatives in specification-stage engagement, directly engaging specifiers and contractors through marketing and technical education, and collaborating with AMCA to build broader market education and alignment. Together, these interventions are intended to create sustained market change that persists beyond direct program influence and contributes to long-term regional energy savings.

NEEA's role during Market Development is to coordinate and scale regional market transformation activities, convene industry stakeholders, support education and awareness efforts, advance market intelligence and data collection, and align regional efforts with evolving codes and standards activities. Regional alliance funders and utilities will continue to partner with NEEA to support the program through coordination, market engagement alignment, and potential complementary local programs as the market matures.

Annual funding requirements for the program are approximately \$800,000 in direct costs, plus NEEA staff time of approximately 2.2 FTE.

1 - Background

1.1 – Program Overview and Objectives

NEEA began market scanning work on commercial and industrial fans and blowers in 2018 to better understand fan efficiency opportunities and evaluate emerging performance metrics. Through this work, NEEA identified the Fan Energy Index (FEI) as the most consistent system-level metric for evaluating fan efficiency across fan types and operating points. FEI measures the efficiency of a fan selection at a specific duty point, or the specific flow and pressure rates the fan is designed to operate, enabling more informed comparisons and improved selection practices during design and specification. Recognizing its importance, NEEA formally supported FEI in both state and federal regulatory proceedings, and the U.S. Department of Energy (DOE) later adopted FEI as the official federal test metric for commercial and industrial fans. Although DOE withdrew the associated proposed federal rulemaking in 2025, FEI remains widely supported by manufacturers, the Air Movement and Control Association (AMCA), and industry stakeholders as the primary efficiency metric for fan performance.

In 2019–2020, NEEA supported the Regional Technical Forum (RTF) in developing unit energy consumption (UEC) measures for commercial and industrial fans, helping establish an early foundation for quantifying savings potential. Efficient Fans were initially explored under the Extended Motor Products (XMP) program, but market research later demonstrated that the fan market operates through a distinct set of actors and decision pathways. Unlike pumps and circulators, which are largely distributor driven, fan selection decisions are heavily influenced by manufacturers, manufacturer representatives, and specifying engineers during the design phase. These findings led to the creation of a standalone Efficient Fans program with a tailored market transformation strategy focused on influencing fan selection practices and increasing adoption of higher-efficiency fan systems.

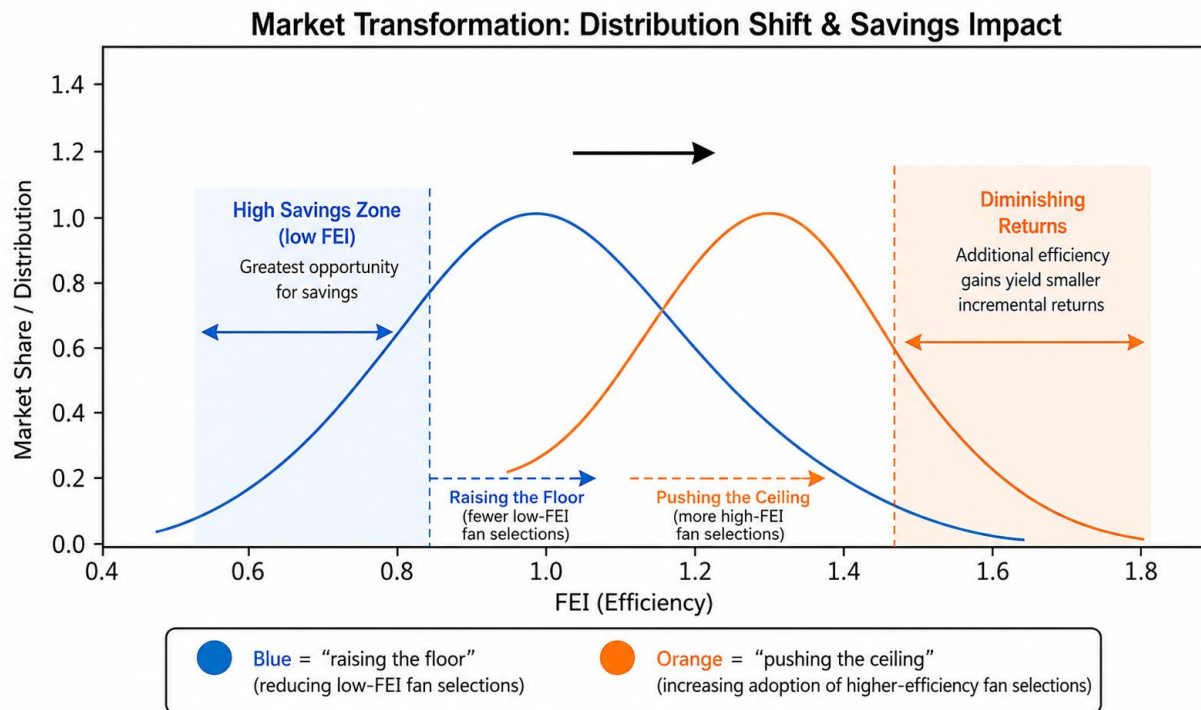
In 2021, NEEA became an associate member of AMCA, strengthening collaboration with manufacturers and industry stakeholders around FEI market education and codes and standards activities. Early program development efforts focused primarily on manufacturers and improving FEI visibility within fan selection software. However, market characterization, additional research, and in-field learnings in 2024-25 demonstrated that software improvements alone were insufficient to drive market change. These learnings supported the program’s decision to intervene at multiple points in the supply chain — including manufacturers, manufacturer representatives, and specifiers — to better influence purchasing and selection decisions throughout the design process.

As a result, the program expanded its strategy to explicitly include manufacturer representatives and specifiers as primary influencers alongside manufacturers. This broader market approach directly supports the program’s primary objective of increasing the consistent specification and installation of higher-efficiency fan systems by making FEI more visible, actionable, and integrated into real-world fan selection practices.

Our program data and manufacturer engagement indicate that while a portion of the market is already selecting fans above current minimum FEI thresholds, a meaningful portion of fans sold into the market continue to fall below FEI levels required by current energy codes in Northwest states. Research and market engagement suggest that significant energy savings opportunities exist by reducing the prevalence of these lower-FEI fan selections and increasing adoption of readily available, higher-efficiency alternatives.

As a result, the program will prioritize a strategy referred to as “raising the floor,” focused on increasing the minimum efficiency level of fan selections occurring within the market. Over the longer term, the program also seeks to support continued upward movement in market efficiency, or “pushing the

ceiling,” through improved FEI visibility, education, selection practices, and codes and standards activities. As illustrated in the graph below, the program’s strategy is intended to shift the overall market distribution toward higher-efficiency fan selections over time while capturing the largest available energy savings opportunities in the near-term. Together, these efforts position the program to support sustained market adoption of more efficient fan selection practices while continuing to adapt strategies based on market feedback, research findings, and evolving industry conditions.



1.2 – Key Learnings

Substantial research and interactions with market partners during Program Development were essential in informing the program. The following are key learnings that informed the program strategy for market development.

1. Market change requires intervention beyond manufacturers and selection software

Initial Program Development efforts focused primarily on manufacturers and improving FEI visibility within selection software. Research and market engagement demonstrated that this approach alone would not sufficiently influence fan selection decisions. Learnings from manufacturer representative and specifier engagement showed that additional intervention points were needed in the decision-making process. In response, the Market Transformation strategy evolved to include direct engagement with manufacturer representatives, specifiers, and broader market actors to influence decision-making throughout the design and selection process.

2. The design and specification stage is the critical leverage point in the process for influencing fan efficiency

Program research confirmed that fan efficiency outcomes are largely determined during the design and specification phase of projects. Research also showed that the majority of fan purchases occur through new construction projects, where first-cost pressures, compressed timelines, and standardized bidding practices limit the effectiveness of downstream interventions. Manufacturer representatives were identified as a key influence on specifiers, who ultimately serve as the primary leverage point in

determining fan selections. As a result, the program shifted greater focus toward supporting specification-stage interventions, increasing FEI visibility within design workflows, and enabling representatives to better communicate the value proposition of efficient fan selections.

3. FEI visibility alone is insufficient to influence purchasing decisions

Program Development activities showed that while awareness of FEI is increasing across portions of the market, FEI is still not consistently understood, valued, or applied in fan selection decisions. Purchasing decisions continue to be driven primarily by first cost, performance requirements, and project constraints. In some cases, higher FEI selections may involve incremental first-cost impacts, while in others FEI is simply not a primary factor considered during selection tradeoff discussions. As a result, FEI currently plays a limited and inconsistent role in final fan selections. These learnings reinforced the need to focus market interventions not only on increasing awareness, but also on improving understanding of the total value proposition of efficient fans and embedding FEI into standard design and selection practices.

4. Sustained market transformation will require industry alignment and supportive codes and standards

Program Development activities reinforced that long-term market change cannot rely solely on voluntary market adoption. Broader industry alignment around FEI, including coordination with manufacturers, trade associations, utilities, and code bodies, will be necessary to scale and sustain market transformation. This learning strengthened the program's strategy to collaborate closely with AMCA and support advancements in codes, standards, and industry education that reinforce efficient fan selection practices over time.

2 - Program Description

2.1 – Market Transformation Theory

Fans are ubiquitous across commercial and industrial buildings. While they individually represent a small portion of a building's energy use, fans account for a total regional load of 839 average megawatts. By partnering with market actors to increase understanding, visibility, and adoption of more efficient fan products, the region could see an estimated energy savings of 114 aMW of technical achievable potential.

However, there are several barriers to realizing these savings. First, market actors such as specifiers, contractors, and influencers have low awareness of efficient fans and the Fan Energy Index (FEI) metric. Second, market actors tend to prioritize factors other than fan energy efficiency when making fan selections. Third, purchasing decisions are heavily driven by first cost at the bidding and selection phase and the limited understanding of the value proposition for efficient fans leads to a consistent preference for lowest-cost options.

To overcome these barriers and accelerate adoption and achieve a transformed market, NEEA's intervention strategies focus on making fan efficiency more visible, better understood, valued, and embedded in standard design and selection practices. NEEA engages with fan manufacturers to improve fan selection software so that FEI is clearly highlighted and optimized to aid in fan selection decisions. NEEA also works to strengthen the value proposition for efficient fans and encourage increasing efficient product design. In parallel, engaging manufacturer representatives to increase FEI understanding and leverage the metric to support efficient fan sales is critical. Manufacturer representatives directly influence specifiers who serve as a key leverage point in the market and will contribute to market

diffusion. This is complemented by engagement with building owners and facility managers through industry associations, such as Building Owners and Managers Association (BOMA) and International Facility Management Association (IFMA), to build FEI awareness, educate on the value proposition of efficient fan systems, and create upward market pressure for efficient products. NEEA works to influence industry alignment through collaboration with organizations such as AMCA and will convene interested organizations to support the advancement of test procedures, standards, and codes. Diffusion is expected to occur as specifiers incorporate FEI into standard specifications, manufacturers shift product offerings and selection software defaults, manufacturer reps normalize efficient options in sales practices, and codes and standards reinforce and scale these changes across the broader market.

When successful, manufacturers will increasingly produce, and their representatives will promote, efficient fan system products as the standard offering, resulting in a sustained increase in the average efficiency of fans in the market. Over time, market actors will consistently select higher FEI specifications, and efficiency will become a routine consideration of selecting decisions rather than a secondary consideration. These market shifts will be reinforced by increasingly stringent codes and standards that reference FEI, ultimately leading to an overall fan efficiency that is 25% better than the 2021 baseline by 2041.

2.2 – Product Definition

Highly efficient fans and blowers are motor-driven systems that are 20-60% more efficient at moving or circulating air compared to standard fans. The focus of the Efficient Fans Program is FEI-rated fans and blowers that are standalone or not part of an efficiency-rated packaged system.

2.3 – Market Description

Target Market		
Who Purchases?	Mechanical contractors – Execute the installation and often place the order Large facility owners/developers – May purchase direct, especially in replacement scenarios or specialized applications	
Who are the End Users?	Building Owners Maintenance Teams Industrial Facility Operators	
Who Influences the Purchase Decision?	Specifying engineers – Define performance requirements, create project specifications and schedules Manufacturer representatives – Provide product options, leverage selection software to make recommendations, impact development of specifications Mechanical contractors – Recommend product based on project requirements, influence selection process based on cost and time, make product substitutions during bidding/procurement Building owners – High influence in retrofit, mostly limited to budget setting and specific features in new construction Facility managers – Influence timing of projects and brand or type of product	
Market Size		Data Sources
Current Market Size	20,000 fans and approximately \$50M annually	Market characterization
Potential of Market	Power Plan 20-year Technical Achievable Potential (TAP): - Commercial: 32 aMW - Industrial: 82 aMW	NEEA & RTF estimates

2.4 – Next Phase: Primary Intervention Strategies

Primary Intervention Strategies	Barrier(s) or Opportunity(s) being addressed	Desired Outcomes
Engage Manufacturers to build awareness and value proposition of efficient fans, and increase selection software effectiveness	Barrier -- Awareness and understanding of (a) efficient fans and (b) the FEI metric is low among market actors, especially specifiers	- Awareness of FEI and non-energy benefits (NEBs) increase for manufacturer reps - Overall FEI of fans designed & produced increases
Partner with Manufacturer Reps to build their understanding and leverage of FEI, support engineering specifier education on value proposition of FEI and efficient fans, and prioritize efficient fan sales	Barrier – Market actors tend to prioritize factors other than fan energy efficiency	- Awareness of FEI and NEBs increase among manufacturer reps - Manufacturer reps leverage FEI and NEBs as part of their sales process - Specifiers, contractors, and influencers are aware of and value/leverage FEI and NEBs of efficient fans - Manufacturer representatives are actively participating in program initiatives and consistently incorporating FEI and efficient fan value propositions into conversations with specifiers and customers, increasing promotion and consideration of higher-efficiency fan selections.
Increase awareness and understanding of Specifiers of FEI and the value proposition of efficient fan systems, and create upward market pressure	Barrier – High First cost and limited understanding of the value proposition for efficient fans limits the selection of efficient fans at the bidding and selection phase of projects. Opportunity – Specifiers are receptive to accessing and using non-energy benefit and financial tool information	- Specifiers are aware of and value/leverage FEI and NEBs of efficient fans - Specifiers are increasingly using FEI within construction documentation materials

Primary Intervention Strategies	Barrier(s) or Opportunity(s) being addressed	Desired Outcomes
• Increase awareness among building owners and facility managers of efficient fan systems and the non-energy benefits, and strengthen demand for efficient fan selection through owner requirements and project expectations	• Barrier – Market actors tend to prioritize factors other than fan efficiency and there is limited understanding of the value proposition of efficient fans	• Building owners and facility managers engaged through industry organizations such as IFMA and BOMA increasingly understand the value proposition of efficient fan systems and create demand for higher-efficiency fan selections within their projects and facilities
• Collaborate with and participate in the Air Movement and Control Association (AMCA) to influence efficiency thresholds, support FEI and fan system efficiency education and awareness, and assist in securing sales data sources	• Opportunity – AMCA and manufacturers are aligned on FEI and support its use	• Northwest State codes and standards reference FEI with increasing stringency • Consensus-based proposal for future DOE FEI levels created and implemented

2.5 – Transition Plan (How will we know when we’re done?)

The program team will monitor Market Progress Indicators (MPIs) for barrier reduction/removal and market growth that can be sustained without NEEA interventions, leading toward the ultimate impact indicated in the table below.

In addition to tracking MPIs, the program’s externally conducted evaluation will include formative/process evaluation to promote continuous improvement and adaptive management of market interventions. This ensures continued diffusion and minimize/eliminate any new barriers that may arise. This, along with the Exit Criteria listed below, will indicate the program is ready for transition to Monitoring in the years ahead.

Target Year for Transition Complete Milestone: 2036	
Ultimate Impact	The average efficiency of commercial and industrial fan systems sold in 2041 that meets the program product definition, in retrofit or new construction applications, will be 25% better than it was in 2021
NEEA’s Exit Criteria	NEEA will exit the market when indications of sustained market change are observed, as operationalized through key MPIs such as: • More than 75% of engaged manufacturer reps leverage FEI and NEBs of efficient fans systems in their business practices • At least 20% of construction documentation specifies minimum FEI levels • DOE published ruling regarding FEI enforcement at or above current program thresholds

3 - Milestone Decision

Program Advancement Criteria

The Program Advancement milestone represents a decision that NEEA has validated that this is a good Market Transformation program for the region and the portfolio, we understand the market barriers and there is a viable plan for how to remove those barriers and achieve the identified savings potential. In the Market Development phase, we will implement intervention strategies, evaluate NEEA’s influence, and measure market progress. The internal stage gate go/no go criteria for Program Advancement that NEEA uses include:

- **Market:** There is a clear target market and a compelling value proposition for that market.
- **Product:** There is a clear product definition and we have met critical product assessment/validation objectives.
- **Interventions:** We have a viable leverage point for intervening in the market. Interventions are tailored to that market, and we have a solid theory of diffusion.
- **Energy Savings and Benefit/Cost Analysis:** The forecasted energy savings is worth the anticipated cost/effort to intervene in the market, and the benefit cost ratio is above 1.
- **Risk:** We have addressed the knowledge gaps that were identified as critical to mitigate risk. We have identified any product, market or policy or measurability risks that could prevent success, and the risk mitigation plan is acceptable.

- **Portfolio:** This program supports short-term and long-term portfolio needs and there are available resources.
- **Product Group:** The Program aligns with the Product Group strategy and has identified potential opportunities to leverage existing programs/infrastructure.
- **Funder coordination:** We are aligned with stakeholders on roles, responsibilities, and communications/engagement expectations.

3.1.1 What does the transition to Market Development entail?

In Market Development, the program will continue working with existing manufacturers and manufacturer representative partners to reinforce successful engagement strategies and influence fan selection practices. At the same time, the program will selectively expand participation by onboarding additional manufacturers and manufacturer representatives to increase market coverage, improve data robustness, and extend reach across the region. Expansion will be prioritized based on market impact potential and available budget through NEEA's annual Operations Planning process.

The program will also deepen collaboration with industry partners, including AMCA, to support broader market alignment through education, standards, and advocacy efforts. And the program will increase investment in marketing, education, and outreach activities designed to directly engage specifiers as well as other audiences, such as contractors, building owners, and facility managers who are involved in fan selection decisions. The program anticipates leveraging channels such as [BetterBricks](#), technical trainings, and industry events to increase awareness and consideration of efficient fan selection practices and FEI within the market. The program also expects to deepen engagement through industry organizations such as ASHRAE, BOMA, and IFMA to expand market reach, reinforce education efforts, and support broader industry alignment around efficient fan selection practices.

In parallel, the program will continue its data acquisition, analysis, and reporting to better track changes in FEI distribution and purchasing behavior, while enhancing communication and education resources to make participation easier and more impactful for market actors.

3.1 - Utility Role

The Efficient Fans program will maintain coordination with alliance utilities through NEEA's Commercial & Industrial Coordinating Committee (CICC) and periodic check-ins to share program progress, market insights, emerging opportunities, and identify opportunities where local utility efforts can effectively complement broader regional market transformation strategies over time. While utility programs are not expected to play a significant role in early program implementation, ongoing engagement with utilities will help ensure alignment with existing offerings and avoid potential overlap.

As the program matures and FEI and efficient fan systems increases, utilities may provide complementary support through local engagement, trade ally and customer education, awareness activities, future fan utility program alignment, and potential future incentive pathways where appropriate. Utilities may also help reinforce regional market transformation efforts through existing relationships with contractors, distributors, building owners, and other local market actors.

3.4 – Investment

Proposed Investment for Market Development (Q3 2026 – Q3 2036)			
Activities			
Amount (Direct Costs)			
Implement program strategies focused on barrier removal and market transformation	6,161,000		
Marketing	641,000		
Market research and evaluation	1,145,000		
Total	7,947,000		
Total Proposed Program Investment – Direct Costs Only			
Phase	Investment to Date	Future Estimated Investment	Total
Scanning	147,000	N/A	147,000
Concept Assessment	N/A	N/A	
Program Development (Q3 2022-Q3 2025)	456,308	N/A	456,308
Market Development	N/A	7,947,000	7,947,000
Market Diffusion*	N/A	120,000	120,000
Total Investment	566,308	8,104,000	8,670,308
* includes one year of Market Diffusion costs			

3.5 – Return on Investment

Return on Investment (ROI)/Outcomes			
Program Benefits			
The Efficient Fans program provides several benefits to the alliance and regional utilities by advancing a coordinated market transformation strategy focused on increasing the specification and installation of higher-efficiency commercial and industrial fan systems. Through engagement with manufacturers, manufacturer representatives, specifiers, and industry organizations, the program is improving awareness and application of the Fan Energy Index (FEI), increasing the visibility of efficiency within fan selection software, and influencing purchasing decisions at key points in the market. In addition to delivering long-term regional energy savings, the program supports utility decarbonization and peak demand goals, strengthens alignment with emerging codes and standards, and helps establish consistent market practices that can accelerate broader adoption of efficient fan systems across the Northwest.			
Energy Efficiency/Savings			
Savings Forecast	2025 - 2029	2030 – 2034	20 - Year Total
Total Regional Savings	0.2 aMW	5.7 aMW	30 aMW
Co-Created Savings	0.2 aMW	5.6 aMW	28 aMW
Net Market Effects	0.2 aMW	5.6 aMW	28 aMW
Current Power Plan Baseline Regional Savings	0.02	0 aMW	0 aMW
Cost Effectiveness: Total Resource Cost Perspective			

	Value	Additional Information (please include source of information)
Levelized Cost	0 cents/kWh	
Benefit Cost Ratio	3.51	Incremental Cost estimate based on RTF Commercial and Industrial Fans version 3.1

3.6 – Portfolio Fit

How does this program support the portfolio goals?	• Medium/long-term electric savings • Diversification beyond traditional measures • Code-enabled savings pathways • Commercial + industrial segment coverage • Measurable market effects with scalable upside	
How does this program impact portfolio risks? (e.g. measurability, timing of savings)	• Reduces Cost-Effectiveness risk • Some unproven market approach risk	
% of Savings (Cycle 7 Investments)	5-Year Co-Created Savings	10-Year Co-Created Savings
	.12%-1.25%	1%-7.8%
% of Budget (Cycle 7 Electric Portfolio Direct)	1.4%	

3.7 – Regional Distribution of Potential Metrics

	Regional Equity
Measurement Context	NEEA assesses regional distribution of potential by comparing each state's share of Technical Achievable Potential, the maximum amount of energy savings that can realistically be captured the efficiency opportunity, to each state's share of NEEA funding. <i>This produces a regional distribution index where 1.0 indicates a perfect alignment between opportunity and investment.</i> Values less than 1.0 indicate that a state has relatively more technical achievable potential (opportunity) than its share of NEEA funding, while values higher than 1.0 indicate a state's share of opportunity exceeds its share of funding. These differences are expected and reflect variations in market conditions, including industry composition, product applicability, and baseline efficiency across states. This metric is used at the <i>portfolio level</i> to ensure the overall portfolio expectations are delivering value to each state in line with funding levels. <i>Values between approximately 0.8 and 1.2 reflect a balanced portfolio in which the opportunities pursued generally match the dollars spent.</i> <i>Provided below is the distribution index specific to the Efficient Fans program, which is one part of the whole portfolio. There is no material impact to the portfolio's total distribution index by state with the addition of the Efficient Fans program to the portfolio.</i>
Program Findings	For Efficient Fans, the results show a slight underrepresentation in Idaho while the other three states fall within the threshold. NEEA program teams will interpret these results alongside program strategy and may adjust expectations based on

	where long-term market transformation impacts are most achievable, while maintaining overall regional balance at the portfolio level. While the distribution of potential index is below the ideal threshold for Idaho state for the Efficient Fans program, the overall portfolio remains within threshold across all four states. There is no risk to the portfolio metric by adding this program to the portfolio.				
		Index where 1 Indicates Share of Opportunity is Equal to NEEA Funding Share			
	By State	ID	MT	OR	WA
		0.7	0.8	1.0	1.2

4 - Program Risk Summary

4.1 – Risk and Response

Risk Event		Probability (H/M/L)			Impact (H/M/L)	Risk Response (Accept, Avoid, Mitigate, Transfer)	Response Plan
"IF" this happens	"THEN" this will occur (impact)						
IF Fan Energy Index (FEI) is not understood and valued by fan engineers and specifiers	THEN Fan engineers and specifiers will not prioritize the most efficient options	M			H	Mitigate	Ensure consistent, simplified messaging and better alignment with market actors
IF manufacturer reps don't see the value and the program is unable to recruit as participants in our program	THEN the program may need to pivot program strategies	L			H	Avoid	Consider aligning more with other NEEA programs who interact with the same manufacturer reps to alleviate market confusion and NEEA fatigue in addition to alternative pathways to partnerships, like via trade associations, or access other leverage points or increase traction
IF we cannot get manufacturer / manufacturer rep data	THEN we will not be able to accurately measure or forecast energy savings or market progress	L			H	Avoid	Consider alternative program strategies to enhance opportunities for market partners like leveraging construction databases, engineering firms, rep/distributor insights, and industry partnerships to maintain

					market visibility and reduce reliance on any single data source.
IF Federal rulemaking uncertainty continues due to the DOE Notice of Proposed Rulemaking (NOPR) not being finalized or adopted	THEN the program will have limited ability to drive consistent market-wide adoption of FEI requirements through mandatory federal standards, reducing the ability to uniformly raise the efficiency floor in the market	M	M	Mitigate	Following the DOE NOPR withdrawal in 2025, the program has increasingly shifted focus toward state and regional code alignment efforts, including FEI state unification activities via AMCA manufacturer, created on behalf of the withdrawal. While the withdrawal may delay broader federal adoption timelines, in this case we would continue advancing regional market transformation efforts while monitoring future federal rulemaking opportunities
IF manufacturers do not prioritize or expand availability of higher efficiency fan products and selections	THEN market adoption and buy-in of efficient fans may remain limited, reducing broader market shifts toward higher efficiency products	L	H	Mitigate	Continue engaging manufacturers and AMCA to support ongoing improvements in fan product efficiency, communicate the value proposition and benefits of higher-efficiency fan offerings, monitor shifts in manufacturer product portfolios, and encourage continued market alignment toward higher-efficiency fan selections. This ongoing engagement helps maintain manufacturer support for efficiency improvements, reinforces the business case for continued participation, and reduces the likelihood of significant market pullback or reduced adoption of higher-efficiency products.
IF input data used to calculate and report FEI is inconsistent or unreliable due to inaccuracies in fan selection inputs and assumptions	THEN FEI fan selection software will not gain trust of the market and will not yield increased selection of efficient fans in the market	L	M	Accept	Accept and apply adaptive management to adjust to new findings, including working with manufacturers to address technical and data-related limitations. In parallel, track market progress through upstream indicators such as changes in selection practices, increased visibility of FEI in selection tools, and incorporation of FEI in specifications.

4.2 – Competitive Landscape

Competitive Landscape				
Use this table to identify competitive products, practices or services that are a risk to NEEA's Market Transformation objectives. The products identified may result in positive or negative outcomes for the region.				
Competitive Product, Practice or Service	Commercially available?	Comparable Cost	Energy Savings	Comments/Notes
Out of scope Low-FEI or unrated fans	Yes	Less expensive	No	These are the main products that the program is targeting
VFDs, sensors, and controls	Yes	More expensive	Yes	VFDs and controls can help to reduce run time and energy consumption, but will not be reflected in FEI
FEG Metric	Yes	N/A - Not cost associated	N/A	Legacy fan efficiency metric that does not account for fan selection at the operating point in the same way as FEI; still in reference in some state codes

Memorandum – *Agenda item (Tier 1)*



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Britt Cutsforth Dawkins, Senior Manager, Marketing Strategy

SUBJECT: 2026 Heat Pump Water Heater (HPWH) Level Up Campaign Results

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Our Ask of You:

Review the summary information below and join the RPAC/RPAC+ meeting on September 1 to hear about the results from the 2026 HPWH *Level Up* campaign, including insights about state-by-state, urban/rural, and English/Spanish performance.

Background/Context:

The *Level Up* campaign creative was initially developed and vetted closely with the RPAC+ group in 2024. It ran the same year to continue to raise consumer awareness and increase consideration of HPWHs across the region. The 2024 and 2025 campaigns were a success, resulting in a combined 50 million impressions across the target audience and more than 320,000 site sessions to the *Level Up* campaign landing page.

At the Q1 2026 RPAC meeting, NEEA staff proposed a brief run in 2026 with a modest \$80,000 budget. All of RPAC's electric funders opted to participate.

2026 Campaign Results:

The campaign—which leveraged the existing and optimized gaming creative, Northwest targeting, and messaging—ran in June 2026 and drove 9.5 million impressions and more than 46,000 clicks. The duration was shorter than the 2024 and 2025 *Level Up* campaigns, each of which ran for a full quarter.

The 2026 campaign benefitted from the testing conducted in the two previous years, allowing for broader targeting in order to reach a wider base of Northwest consumers.

TAKEAWAY #1: Interest in HPWHs remains above average, as indicated by engagement with the campaign ads—and particularly on Meta.

As in previous campaigns, the ad clickthrough rate (CTR) showed that Northwest consumers continue to be interested in learning about HPWHs. While the CTR has fluctuated through the years based on both targeting and each campaign's unique media mix, it has generally increased steadily since 2021 and remained above average CTR benchmarks for both Meta (Facebook and Instagram) and display ads.

Meta continues to be the most cost-efficient marketing conversion media channel across all four states.

TAKEAWAY #2: Northwest consumers engage with the marketing channels and messaging in distinct ways.

While the Northwest is one market, the four states do respond differently to the advertising. The campaign corralled the region into eight segments, with urban and rural lists for each state, then further split each of those eight lists into English and Spanish.

- *Idaho consumers* were most responsive to waste reduction and affordability messaging in ads. Technology generated interest but less downstream action.
- *Montana consumers* were quite practical, preferring to click on ads about affordability, waste reduction, and customer satisfaction. They were also far more likely to engage with display ads than any other of the seven segments, with a CTR more than double the average display ad rate.
- *Oregon consumers* have the broadest set of interests, with engagement across multiple themes. Affordability, customer satisfaction, and technology messages all performed well in the state.
- *Washington consumers* were most likely to click on the campaign ads overall, and were most motivated by ads that had customer satisfaction, efficiency, and affordability messaging.

TAKEAWAY #3: Urban consumers remain more likely to click on the ads, though rural consumers are more likely to take the next step on the campaign landing page.

Urban audiences had a slightly higher click-through rate, 0.59% compared with 0.56% for rural audiences. Rural website visitors had a higher marketing conversion rate, 0.45% compared with 0.42% for urban. While urban audiences have clicked at a higher rate in all of our campaigns since 2022, rural media should be evaluated on downstream customer behavior as well as CTR.

Rebate information on the landing page was the most frequently selected resource (79% of marketing conversions) across every market, continuing a pattern seen in previous years. However, rural consumers were also slightly less concentrated on the “Find Rebates” and also showed interest in the other options on the campaign landing page.

TAKEAWAY #4: English and Spanish consumers continue to be motivated by differing messages.

For English-speaking audiences, different messaging drove different actions. Reducing energy waste was the top click driver, but consumers clicking on heat pump efficiency and technology ads drove the most marketing conversions once they came to the campaign landing page.

For Spanish-speaking audiences, affordability was by far the strongest action driver. Messaging about the practical value of upgrading to a HPWH and dependable performance was the most powerful in driving ad clicks and marketing conversions. The highest engagement from Spanish consumers came from Oregon and Washington.

Please contact [Britt Cutsforth Dawkins](mailto:bdawkins@neea.org) (bdawkins@neea.org) if you have any questions about the campaign or marketing for the Heat Pump Water Heater Program.

Memorandum – *Informational item (Tier 2)*

August 25, 2026

TO: Regional Portfolio Advisory Committee

FROM: Peter Christeleit, Senior Manager, Corporate Strategy & Stakeholder Relations
Virginia Mersereau, Vice President, Corporate Strategy, Relationships & Communication

SUBJECT: Planned 2026 Stakeholder Satisfaction Survey (Sept 28 – Oct 27)

Our Ask:

Please review the request below and encourage your staff engaged with NEEA to complete the survey. The results drive continuous improvement efforts for the alliance's stakeholder experience. Please contact Peter Christeleit with questions: pchristeleit@neea.org.

Need to Know:

In October, 2026, NEEA will launch an **online stakeholder satisfaction survey**, similar to the survey that was completed in 2024. The survey will be open for 4 weeks (Sept 28 – Oct 27) and will seek feedback on funders/stakeholders' experience with NEEA's work, committees/forums and staff engagements (see additional detail below). Once the NEEA board approves the survey language and recipients, NEEA staff will send the survey to all current participants in alliance committees and work.

Survey Details:

The last time NEEA conducted a formal stakeholder satisfaction survey was in 2024. To assess the current perception of NEEA's performance with stakeholders, staff are preparing to launch another stakeholder satisfaction survey in October 2026. Survey results, insights and an action plan to address the results (if needed) will be shared with the Board at its Q1 meeting in 2027.

Research Goals:

- Benchmark stakeholder satisfaction of the alliance's work and engagements with NEEA staff and Northwest stakeholder forums against previous survey findings.
- Gain insights that can be put into action to improve stakeholders' experience with NEEA.
- Understand where regional collaboration and work are excelling and where there are opportunities for improvement and/or new approaches.

Categories of Survey Recipients:

- Board members (~20 people)
- Members of the Regional Portfolio Advisory Committee and Natural Gas Advisory Committee as well as members of the marketing group that joins RPAC+ discussions (~30 people).
- Members of the Cost-Effectiveness Advisory Committee (~12 people)
- Members of the Regional Emerging Technology Advisory Committee (~12 people)

- Coordinating Committee members (~40 people)
- Workgroup and steering committee members (e.g., End Use Load Research, building stock assessments, etc.) (~45 members)
- Special Projects Steering Committees (~12)
- Others as requested by the Board.

Proposed Timeline:

- Q2 Board meeting (June 23-24): Share Stakeholder Engagement Survey Plan + Questions with the Board
- June-Sept: Notifications in committee meetings that survey is coming
- Week of September 28: Link to online survey sent to stakeholders
- Survey Period: 2-3 Reminders sent to respondents.
- Week of October 26: Survey period is closed.
- Early January: Results shared with internal team/ key staff.
- Feb 2027: Action plan developed based on survey results.
- February 2027: Exec Committee review of survey results, insights and potential actions
- February 2027: RPAC/NGAC review
- March 2027: Board presentation

Memorandum – Informational item (Tier 2)



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Emily Moore, Director, Market Strategy & Execution and Dave Hammond, Manager,
Program Management

SUBJECT: Program Expansion Update for Advanced Performance DOAS

Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the upcoming RPAC meeting, or contact NEEA staff listed below.

In Q2, NEEA staff shared an overview of program expansion opportunities and a proposed approach for stakeholder engagement in these instances. The Committee also heard more specifics about an upcoming opportunity to expand the Advanced Performance DOAS program to include DOAS units paired with gas heating systems.

As a reminder, in both the electric and natural gas portfolios, new opportunities are emerging that expand the scope of an existing program. Many of these opportunities cross fuels and may ultimately lead to dual-fuel funded programs. By definition, program expansions are the advancement of a technology or solution that is closely aligned with an existing NEEA program and can be effectively delivered by adapting that program's scope, intervention strategies, and market approach. Program expansions leverage established market knowledge, relationships, and infrastructure to reduce duplication, lower incremental risk, and accelerate entry into Market Development.

In Q4, the Natural Gas Advisory Committee (NGAC) will be reviewing the Program Advancement milestone to add Advanced Performance DOAS to the natural gas portfolio and begin co-investing in Market Development activities. With a successful vote, the program will track and report electric and gas savings and become dual-fuel funded. As discussed in Q2, this change will produce some cost savings for the electric portfolio funders while helping accelerate the overall market transformation effort by engaging building owners and designers regardless of their fuel choice.

In parallel to bringing the program forward to NGAC and facilitating that committee's review and vote, NEEA staff will keep RPAC apprised and ensure the following is shared with RPAC for visibility and opportunity for feedback:

- Proposed changes to the program's scope and MT interventions
- Benefits and any potential risks from the current program perspective
- Methodology for the co-funding approach and funding share for the electric and gas portfolios

Please **contact Emily Moore (emoore@neea.org) or Dave Hammond (dhammond@neea.org)** if you have questions about the planned program expansion.

Memorandum – *Informational item (Tier 2)*



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)
FROM: Alex Merrill, Program Manager, Heat Pump Water
SUBJECT: Heaters Heat Pump Water Heater Work Group Update

Our Ask of You:

Please review the update below and reach out with any questions or feedback you have. Thank you to those who helped assign a representative(s) from your organization.

Brief Update:

NEEA staff launched the Heat Pump Water Heater (HPWH) work group in Q1 2026 to convene the region and identify opportunities to focus and amplify our collective regional resources and efforts to increase adoption of HPWH. This work group will develop a roadmap of actionable steps for the region to consider and adopt as appropriate based on assessed gaps and needs. Work group members from 12 utilities (including BPA & Energy Trust) are participating.

Following kickoff and workshopping of priority areas in Q1, the work group continued with more focused conversations around prioritized solutions. At the June meeting, NEEA shared information regarding the draft HPWH Advanced Water Heating Specification update. The meeting focused on an in-depth discussion of the installer specialist strategy with a focus on program design, roles and responsibilities, and challenges and related mitigation strategies. At the August meeting, the group held a similarly structured discussion focused on the second priority topic, negotiated pricing.

The work group facilitators are scheduling one-on-one meetings with participants in preparation for September's meeting, which will focus on developing a draft regional strategy based on the discussions to date.

Program Context:

In May 2024, the U.S. DOE finalized a federal standard requiring most electric storage water heaters to transition to heat pump technology by 2029. The standard is key to the region realizing the significant energy savings potential that this technology offers. This period leading up to 2029 is a critical time for deeper regional collaboration to help ready the market for this shift, which motivated NEEA to stand up a work group. Key outcomes of this work group are to develop strategies that increase short-term energy savings and support long-term HPWH adoption in compliance with the new federal standard.

RPAC Context:

As a reminder, work groups are formed by RPAC on an as-needed basis and staffed with as-needed expertise, for a limited term and specific purpose that is distinct from that of RPAC and the Coordinating Committees.

Please contact **Alex Merrill** (amerrill@neea.org) if you have questions about the Heat Pump Water Heater work group.

Memorandum – Informational Update



August 25, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Anouksha Gardner, Stakeholder Relations Manager (Coordinating Committees)
Mark Rehley, Director, Codes, Standards, New Construction, & Emerging Tech (RETAC)
Jonathan Belais, Policy Manager (CEAC)

SUBJECT: Update on recent electric committee meetings (Q2 / Q3 2026)

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Our Ask of You:

Please review the memo and bring any questions, recommendations, feedback, or concerns to the upcoming RPAC meeting, or contact NEEA staff listed below.

Commercial & Industrial Coordinating Committee (CICC):

The CICC uses an annual planning process to co-create high-priority regional topics for the following NEEA programs (commercial & industrial focus): Luminaire Level Lighting Controls (LLLC), High-Performance HVAC, Extended Motor Products (XMP) Pumps & Circulators, Efficient Fans, and Better Bricks. This year's co-created regional priority topics are listed in the [CICC 2026 Workplan](#). As a reminder, the coordinating committees skip Q3 and only meet three times a year.

In the Q4 2026 CICC meeting on day 1 (Nov 4), the Committee will receive a presentation from the Efficient Fans Program Manager Alexis Muench for the regional priority topic *Optimizing fan selection software to highlight Fan Energy Index (FEI) and influence specifier decision-making*. Committee members and NEEA Program Managers will also share out organizational and programmatic updates during the Regional Roundtable. On day 2 (Nov 5), the Committee will engage in the annual planning process to co-create regional priority topics for 2027. To access 2026 meeting notes, slides and agenda packets for past or upcoming meetings, please visit neea.org [here](#).

Please contact [Stephanie Quinn](#) or [Anouksha Gardner](#) with questions about the CICC.

Residential Coordinating Committee (RCC):

Like the CICC, the RCC uses an annual planning process to co-create high-priority regional topics for the following NEEA programs (residential focus): Heat Pump Water Heaters (HPWH), Consumer Products/Retail Product Portfolio (RPP), and Advanced Heat Pumps (Advanced HP). This year's co-created regional priority topics are listed in the [RCC 2026 Workplan](#). As a reminder, the coordinating committees skip Q3 and only meet three times a year.

In the Q4 2026 RCC meeting on day 1 (Dec 1), the Committee will engage in a discussion on the results of *Energy Modeling on room heat pumps*, as the regional priority topic facilitated by NEEA Program Manager Anne Brink. Committee members and NEEA Program Managers will also share out organizational and programmatic updates during the Regional Roundtable. On day 2 (Dec 2), the Committee will engage in the annual planning process to co-create regional priority topics for 2027. To access 2026 meeting notes, slides and agenda packets for past or upcoming meetings, please visit neea.org [here](#).

Please contact [Stephanie Quinn](#) or [Anouksha Gardner](#) with questions about the RCC.

Regional Emerging Technology Advisory Committee (RETAC):

The Q2, June 17, RETAC meeting included presentations from Ron Domitrovic with the Electric Power Research Institute (EPRI) and Spencer Sator with the Consortium for Energy Efficiency (CEE) as well as a group round robin. The EPRI presentation was an in-depth exploration of heat pump technologies covering residential, commercial and industrial applications including a discussion of the implications for grid management, efficiency, and demand response. The CEE presentation reviewed CEE's mission, membership and technology tracking done by the Emerging Technology Collaborative (ETC) and CEE's staff. In addition to an update on CEE's tracking database, several technologies were reviewed that are priorities for the ETC.

The Q3 meeting is scheduled for September 30, 2026.

Resources / reference:

- Recent & upcoming meeting notes, slides and agenda packets are available on neea.org [here](#).
- To view the Product Council schedule and recordings of previous meetings or to submit requests for product councils, visit [neea.org](#).

Please contact [Mark Rehley](#) or [Alisyn Maggiora](#) with any questions about the RETAC.

Cost-Effectiveness & Evaluation Advisory Committee (CEAC):

The Q3 2026 Cost-Effectiveness and Evaluation Advisory Committee Meeting on August 26 will orient members to NEEA's major energy-use studies and how their data support market sizing, modeling, program strategy, and savings forecasts; review findings from Heat Pump Water Heater Market Progress Evaluation Report #8; and provide a brief market research and evaluation update. The committee will also review updated key inputs and assumptions and advise on the third-party review of the Efficient Fans naturally occurring baseline. The final discussion will seek CEAC feedback on NEEA's proposed methodology for allocating costs between electric and natural-gas funders for dual-fuel-funded market transformation programs.

The next meeting (Q3 2026) is scheduled for August 26, 2026.

Recent & upcoming meeting notes, slides and agenda packets are available on neea.org [here](#)

Please contact [Nathan Martinez](#) or [Jonathan Belais](#) if you have questions about the CEAC.

Market Progress Quarterly Report

Residential



**Retail Products
Portfolio**



**Heat Pump Water
Heaters**



**Advanced Heat
Pumps**

Commercial and Industrial



High Performance HVAC



Extended Motor Products



Efficient Rooftop Units



Efficient Fans



**Luminaire Level Lighting
Controls**



**Advanced Commercial
Water Heating**

Infrastructure



BetterBricks

Residential

Initiative Name					
Manager		Fuel Type		Initiative Goal	
Consumer Products Product Group	Retail Products Portfolio (RPP)	Anne Brink	Electric	Leverage midstream incentives to influence retail stocking practices, ultimately driving manufacturing and standards for a portfolio of energy efficient products sold through the retail channel.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Advance heat pump dryer and refrigerator readiness for further market adoption in Cycle 7.	Initiate testing of refrigerators by Q2 2026. Produce initial insights on product updates for heat pump dryers by Q4 2026.	Complete one of the following activities: Initiate testing of refrigerators by Q2 2026. Produce initial insights related to product improvements for heat pump dryers by Q4 2026.	Heads up	Refrigerator testing of advanced adaptive controls was initiated early in Q2 and is on track for completion in 2027. Heat pump dryer research on consumer dissatisfiers will provide initial insights in Q1 2027.
	Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026. Add TV incentives to ESRPP by Q3 2026.	Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026. Add TV incentives to ESRPP by Q3 2026.	Develop an action plan to accelerate ENERGY STAR TV market share by Q2 2026.	Heads up	The team developed an accelerated TV action plan during Q2. Progress was also made on the TV voluntary agreement with signatories verbally agreeing to on-mode power levels in Q2. The team will work to gain support for ENERGY STAR TV's among current and potential ESRPP sponsors and work to include ENERGY STAR TV's in the ESRPP portfolio, though that is not likely to happen until 2028.
	Strengthen relationships with key partners to maintain and improve long term program success.	Identify one collaborative marketing sales effort with retailers by Q2 2026 to implement in 2027. Scope opportunity with Pro Channel and develop recommendations by Q3 2026.	Identify one collaborative marketing sales effort with retailers by Q2 2026 to implement in 2027.	On target	The RPP team is working with one major retailer to advance the sales of heat pump water heaters. This retailer is planning to update website content and sales associate selling tools to improve sales performance in this product category. Additional promotional activities are being explored by the retailer's program contacts and the merchant team. Pro Channel investigation is complete and the findings and recommendations will be reviewed internally in Q3.

Residential

Initiative Name					
Manager		Fuel Type		Initiative Goal	
Water Heating Product Group	Heat Pump Water Heaters (HPWHs)	Emily Rosenbloom	Electric	Influence passage of a federal standard for all electric storage tanks > 45 gallons by 2025.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Deepen engagement with local stakeholders to accelerate adoption and impact.	Conduct at least four new collaborations with regional stakeholders to accelerate adoption of HPWH.	Conduct at least two new collaborations with regional stakeholders to accelerate adoption of HPWH.	Heads up	In Q2, the program continued convening the HPWH utility work group. The work group focused on prioritizing strategies identified by the group followed by in-depth discussions of the identified priority strategies. The work group is continuing to meet in Q3 to continue these discussions. The program continued the partnership with Energy Trust of Oregon to deliver targeted retail training at two Lowe's branches in Oregon in Q2, equipping store employees with key information and considerations for HPWH sales. The program is on track to meet the threshold of this goal.
	Leverage national engagement to increase extra-regional adoption of HPWHs to ease the transition to the upcoming standard change.	Collaborate with at least three extra-regional partners on an activity to increase the market share of HPWH by Q3 2026.	Collaborate with at least two extra-regional partners on an activity to increase the market share of HPWH by Q4 2026.	On target	In Q2, the program led a Regional Energy Efficiency Organization (REEO) roundtable call to share updates on HPWH efforts throughout the country. The program also met with Southeast Energy Efficiency Alliance (SEEA) separately to share best practice experiences in engaging HPWH installers and regional stakeholders. The program is on track to meet the target of this goal.
	Ensure a broad range of high-performing products are available and well-supported by maintaining and updating product qualification standards, expanding technical resources, and showcasing innovation.	Complete lab testing and award Hot Water Innovation Prize by Q3 2026 Secure commitment from at least two entities to run demonstration projects with the winning product to bring awareness to the innovative solution.	Complete lab testing and award Hot Water Innovation Prize by Q3 2026.	On target	In Q2, the program completed lab testing for the Hot Water Innovation Prize and the winner was selected and notified. The winner will be announced in Q3 and an industry conference was secured to host the announcement. The program also identified a third demonstration project partner to build awareness of the winning product. The program is on track to meet the target of this goal.

Residential

Initiative Name					
Manager		Fuel Type		Initiative Goal	
HVAC Product Group	Advanced Heat Pumps		Suzi Asmus		Electric
					Develop program to lock in heat pump efficiency that is 30 percent more efficient than current standards via a series of improvements to the federal test procedure and minimum standard, driving transition from all electric heating to VSHP across all applications and optimizing performance with connected controls.
	2026 Operations Plan Milestones		Target		Threshold
					Status as of 8/24/2026
					Comment
	Build alignment with priority partners and manufacturers on products, standards, codes, specifications, and metrics that include advanced heat pump improvements.		Conduct targeted outreach to each of the program's priority partners and manufacturers to achieve strategic alignment, resulting in individualized strategic plans with at least six partners by Q4 2026.		Conduct targeted outreach to each of the program's priority partners and manufacturers to achieve strategic alignment, resulting in individualized strategic plans with at least three partners by Q4 2026.
	Refine improvement specifications and savings rate confidence.		Launch current practice field research and start 3-5 field demonstrations in Q3 2026.		Launch current practice field research and initiate contracting for 3-5 field demonstrations in Q4 2026.
	Effectively communicate value proposition to key market stakeholders and strategic partners.		Develop and deploy 3-5 high value communications pieces (e.g. videos, infographics, case studies, testimonials) by Q4 2026.		Develop and deploy two high value communications pieces by Q4 2026.
					On target
					NEEA has begun development of strategic plans for a total of eight priority partners, including four manufacturers and four efficiency organization partners. Two manufacturers and two national laboratories are co-funding connected commissioning certification testing with NEEA. Six additional manufacturers are co-developing with NEEA a new connected commissioning certification requirement. NEEA's work with Regional Technical Forum and other regional energy efficiency stakeholders has resulted in significant alignment on a strategy to minimize use of electric resistance heat through utility program measures.
					On target
					NEEA is working with Driftless Energy to conduct the heat pump field study on current practices for heat pump installations. Participant recruitment is anticipated to start in September. NEEA completed two field demonstrations of embedded commissioning capabilities in the Daikin and Trane systems. Three additional field demonstrations are in development for completion in September and October, positioning the program well to meet the goal for the year.
					On target
					Foundational program collateral is now in place with a photo library, new program-related content on BetterBuiltNW.com, and conference-ready materials (banner, tabletop signage, 1-pagers, and a "recipe card" for Advanced Heat pumps). The program's first field demonstrations of Daikin's and Trane's embedded commissioning capabilities informed two summary communications shared with utilities for discussion in the Consortium for Energy Efficiency forum. Additional pieces are in development for completion in 2026.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
HVAC Product Group	High-Performance HVAC / Very High Efficiency Dedicated Outside Air Systems (VHE DOAS)		Electric	Accelerate the adoption of high efficiency HVAC systems and components, and support commercial code advancement that requires the very high efficiency DOAS approach or equivalent efficiency by 2035.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Promote system approach and highlight full value proposition (including non-energy benefits) throughout the supply chain.	Conduct at least 10 awareness or educational efforts targeting supply chain audiences.	Conduct at least 7 awareness or educational efforts targeting supply chain audiences.	On target	The Advanced Performance DOAS program conducted five additional presentations/educational events in Q2, highlighted by an opportunity to discuss DOAS benefits at a Seattle building tour event and multiple presentations on the recent ERV/HRV testing procedure analysis results to national leaders focused on commercial codes & standards. This brings the total educational efforts to eight for the year, well on track to exceed the target of ten efforts for the year.
	Expand program engagement strategy and technical resources to include focus on efficient hydronic heating and cooling systems (e.g. air-to-water heat pumps).	Develop and publish at least five technical resources and/or case studies focused on very high efficiency DOAS and hydronic heating and cooling to BetterBricks.	Develop and publish at least three technical resources and/or case studies focused on very high efficiency DOAS and hydronic heating and cooling to BetterBricks.	On target	The program team continued to review and update core program documents in Q2 to ensure hydronic system specifications are clearly defined. External facing updates to two core program resources are planned to be completed by Q3. Additional existing materials will be updated in Q4 as well as the creation of new resources. The program team is on track to meet or exceed the target of five hydronic-focused technical resources and/or case studies.
	Build support for NEEA's proposed code changes for ASHRAE and IECC.	ASHRAE technical committee accepts new ERV/HRV testing procedure using components of the CSA SP18 testing procedure.	Submit proposed change to ASHRAE committee overseeing ERV/HRV testing procedures using components of the CSA SP18 testing procedure.	Action required	The testing of the CSA SP18 testing procedure was completed in Q2 with the accompanying report planned for publication and presentations in Q3. Prior to moving forward with the submission of an American Society of Heating, Refrigeration and Air Conditioning Engineers (ASHRAE) code proposal, the program team now plans to build support for this proposal through engagement with the Air Conditioning, Heating & Refrigeration Institute (AHRI) and the key manufacturers participating with AHRI. This was identified as a critical step in order to gain ASHRAE support for new testing procedure proposals. This will likely delay the timing of this strike zone target & threshold, pushing the ASHRAE proposal to 2027.

Commercial and Industrial

Initiative Name		Manager	Fuel Type	Initiative Goal	
HVAC Product Group	Efficient Rooftop Units (Efficient RTUs)	Jason Jones	Gas	Increase the efficiency of rooftop units through product differentiation and ultimately an updated federal standard by 2034 that requires at least 20 percent more efficient RTUs than the 2020 market average.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Deepen and expand manufacturer relationships to support and accelerate their product development efforts on efficient RTUs for the light commercial market.	Engage with a minimum of three new, code-level manufacturers (e.g., Trane, Lennox, Carrier, etc.) to develop plans for producing new eligible equipment.	"Achieve one of the following outcomes: Two manufacturers (new or existing) producing new eligible equipment. Two new price points introduced. Two expanded product lines serving the light commercial market."	On target	The program team is currently engaging with Carrier, Trane, and York (Bosch) about adding AP RTU features in new designs. Additionally, as part of CEE's RTU Project team, NEEA staff are working with industry partners (manufacturers) to finalize new CEE efficiency tiers that will include additional features (low leakage dampers, etc.).
	Continue to create and increase partnerships and support for already-qualified efficient RTUs among market actors (manufacturers, manufacturer reps, distributors, contractors) and utilities across the U.S. and Canada.	Recruit six new manufacturers/ distributors/ manufacturer representatives to provide efficient RTU sales data by Q2 2026.	Recruit four new manufacturers/ distributors/ manufacturer representatives to provide sales data by Q4 2026.	Heads up	The program has a project order in place with one manufacturer rep to collect sales data, and is working with 4 additional partners to get agreements in place. Currently, the program is on track to meet the goal threshold.
	Build market actor awareness to ensure a clear, cohesive set of value propositions for efficient RTUs throughout the supply chain.	Deliver four high-impact engagements (e.g., in-person trainings or presentations) utilizing four new marketing assets tailored to supply chain groups such as installers, contractors or facility organizations by Q3 2026.	Develop four new marketing assets (e.g., trainings, flyers, case studies, etc.) by Q4 2026.	Heads up	Marketing team has created multiple marketing assets for Advance Performance RTUs, resulting in increased traffic to the RTU page on BetterBricks. Program is not on pace to meet the goal target goal of delivering four engagements by end of Q3 but is expecting to have at least four by the end of 2026 and exceeding the goal threshold goal.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
HVAC Product Group	Dual-Fuel Residential HVAC	Deborah Sunada	Gas	Build awareness and communicate the value proposition of optimally designed and installed dual fuel systems while supporting the market in developing and specifying the best performing systems, including grid-enabled controls benefits.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Validate dual fuel system product performance and energy savings through demonstration projects.	Complete 2 demonstration projects showcasing dual fuel configuration technology or demand response capabilities with final reports published.	Complete one demonstration project and initiate second demonstration project showcasing dual fuel product performance and energy savings.	Heads up	This goal is ongoing with one demonstration project completed and a second field research project underway. Completed project report is expected to be published in Q3 2026. Second field study is expected to collect data through 2026-2027 heating season.
	Understand current market conditions in Residential HVAC and implications/motivators for adoption across the supply chain and consumers.	Complete Market Characterization study and issue final report.	Complete Market Characterization study with initial findings	On target	This goal is on target with the Market Characterization study ongoing and final report expected in Q4 2026.
	Identify and refine program barriers, leverage points, and interventions.	Develop preliminary logic model including barriers, leverage points, and interventions using Market Characterization findings.	Develop preliminary logic model.	On target	This goal is on target with preliminary logic model developed in Q3 2026 and Market Characterization findings that will be incorporated in Q4 2026.
	Refine target market, baseline conditions and near-term gas savings	Refine Program Development target market, baseline and validate gas savings over baseline.	Refine Program Development target market and baseline.	Heads up	The work to refine the target market and baseline is ongoing as part of program development. Independent validation of gas savings over baseline will be conducted in Q1/Q2 2027.

Commercial and Industrial

Initiative Name					Manager	Fuel Type	Initiative Goal	
Lighting Product Group	Luminaire Level Lighting Controls (LLLC)		Anne Curran		Electric		Develop best practice specifications for luminaire level lighting controls, aiming to have the technology adopted as standard industry practice.	
	2026 Operations Plan Milestones		Target		Threshold		Status as of 8/24/2026	Comment
	Strengthen focus and promotion of LLLC by key manufacturer sales channels to motivate more sales professionals to champion LLLC to their customers.		Collaborate on strategic events with 14 manufacturer representatives who have not previously featured LLLC.		Collaborate on strategic events with 10 manufacturer representatives who have not previously featured LLLC.		On target	The program team supported Idaho Power on two trade ally lighting trainings in Q2, featuring eight lighting manufacturer representatives who had not previously worked with the LLLC program to promote LLLC. These events serve the dual purpose of featuring LLLC to this lighting installer audience and also strengthening the capacity and commitment of these manufacturer representatives to champion LLLC to their clients in the future. The program is well positioned to meet its goal in 2026.
	Influence leading lighting designers, engineers and installers to include LLLC in their ongoing business practices.		Conduct 10 educational events, with at least four featuring a presentation by a lighting designer, engineer or installer.		Conduct eight educational events, with at least three featuring a presentation by a lighting designer, engineer or installer.		On target	The program team collaborated in Q2 with Energy Trust of Oregon to deliver two trainings for LLLC. The first was featured at Energy Trust of Oregon 2026 Technical Forum, and a second was featured Energy Trust of Oregon Existing Buildings Trade Ally Trainings in Portland, Bend and Medford. Additionally, the program delivered a hands-on LLLC training to staff at Platt Electric, a lighting distributor. The program is well positioned to meet its goal for 2026.
Lighting Product Group	Increase visibility and demand for LLLC through strategic national engagements to build scale.		Strengthen strategic alignment and collaboration with IES, DLC and ASHRAE.		Strengthen strategic alignment and collaboration with at least two of the three following organizations – IES, DLC or ASHRAE.		On target	Design Lights Consortium (DLC) which administers the national technical specification and qualified product list (QPL) for LLLC, updated its specifications v5.2 to include the capture of information about connectivity of LLLC to HVAC via a thermostat, influenced by NEEA's work on this emerging capability. The DLC v5.2 update also includes system configuration reporting aligned with industry standards, which NEEA supported. NEEA staff is representing Lighting on ASHRAE's board for the new Center of Excellence for Indoor Environmental Quality (IEQ). The new IEQ education rolled out in Q2 positions LLLC as a key solution to meet recommended capabilities. These developments in Q2 with both DLC and ASHRAE position the program well to meet its 2026 goal.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
Motors Product Group	Extended Motors Products (XMP)	Warren Fish	Electric	Working midstream with distributors and manufacturers, drive awareness, stocking and sales of highly efficient pumps and circulators, and influence Federal standards over time.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Motivate participating manufacturer representative firms to preferentially stock and increase sales of smart pumps and smart circulators.	Reach market share of 25% for smart pumps and smart circulators, excluding sales in the submersible turbine category.	Reach market share of 20% for smart pumps and smart circulators, excluding sales in the submersible turbine category.	On target	Smart pumps reached 26% market share in Q2 and smart circulators reached 47% market share in Q2, reflecting outstanding efforts by participating rep firms to convince customers of the value of high efficiency pumps and circulators.
	Raise awareness of the value of efficient pump products and increase the use of the ER label in identifying smart pumps.	Complete 15+ high-impact awareness building activities: HI progress toward smart pump registry, smart pump promotion resources, case studies, lunch & learn events, and "Industry Voices" videos.	Complete 10+ high-impact awareness building activities: HI progress toward smart pump registry, smart pump promotion resources, case studies, lunch & learn events, and "Industry Voices" videos.	On target	The program is on track to meet this goal, with multiple awareness building highlights from the first half of the year: Hydraulic Institute (HI) has wireframes and smart pump content drafted for HI Smart Pump Database the Alliance is supporting; five lunch & learn and distributor events completed; and Smart Pump case study analysis complete and progressing toward publication.
	Accelerate program participation by growing the number of participating manufacturer representative firms, and by expanding the program scope into additional markets.	Recruit manufacturer representative firms to support and participate in program activities, resulting in a total of at least 12 firms by Q4 2026.	Recruit manufacturer representative firms to support and participate in program activities, resulting in a total of at least 10 firms by Q4 2026.	On target	Have ten active participants and are currently developing agreements with two additional pump company participants, one in industrial and one in irrigation/well pumping.

Commercial and Industrial

Initiative Name		Manager	Fuel Type	Initiative Goal	
Motors Product Group	Efficient Fans	Alexis Muench	Electric	Develop program to accelerate the adoption of efficient fans and fan system components.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Complete critical program development activities, finalize the Market Transformation theory and logic model, and gather additional market data to support program advancement to Market Development in 2026.	Finalize Market Transformation theory and key intervention strategies by Q3 2026.	Finalize Market Transformation theory and key intervention strategies by Q4 2026.	On target	Finalized the Market Transformation theory and logic model, completed critical program development activities, and gathered additional market data before Q3—supporting the program’s planned advancement to Market Development in 2026.
	Leverage findings from recent market research on specifiers and manufacturer representatives to refine messaging, test market responses, and better understand communication channels that influence purchasing decisions.	Develop 2+ resources by the end of Q3 that further define target audiences and their intervention points based on market research, manufacturer and rep engagement, events, and conversations with industry leaders.	Develop 2+ resources by end of Q4 that further define target audiences and their intervention points based on market research, manufacturer and rep engagement, events, and conversations with industry leaders.	On target	Developed and circulated three audience and market-engagement resources before Q3. Informed by partner engagement, industry events, market research, and conversations with market leaders.
	"Build on the program’s relationship with the Air Movement and Controls Association (AMCA) to strengthen FEI awareness across the market and collaborating on a potential data collection effort involving multiple fan manufacturers."	Finalize a renewed AMCA partnership agreement and execute 3+ strategic initiatives that measurably expand FEI visibility, strengthen industry alignment, and support manufacturer engagement.	Execute strategic collaboration with AMCA through 2 initiatives, including conferences, communications, or joint initiatives that expand FEI visibility.	On target	This goal was met as the program finalized the renewed AMCA partnership agreement, participated in an AMCA subcommittee, presented at an industry conference, and completed FEI education initiatives to increase FEI visibility, strengthen industry alignment, and support manufacturer engagement.

Commercial and Industrial

Commercial and Industrial					
Initiative Name		Manager	Fuel Type	Initiative Goal	
Water Heating Group	Advanced Commercial Water Heating	Melissa Mejía	Gas	The program will transform the commercial and multifamily water heating retrofit and new construction market to increase the adoption of gas heat pump (GHP) water heating systems, resulting in reduced gas consumption and carbon emissions in these sectors.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Validate advanced commercial water heating systems' performance and savings via continued field and lab testing	Complete and share interim field test findings with stakeholders and identify and scope opportunity to validate performance in additional target application.	Complete field test interim report and identify opportunity to validate performance in additional target application	Heads up	One field demonstration is in progress and another is expected to begin in Q3. The program has also selected a lab to test configurations for commercial applications that we have not been able to conduct in the field, specifically lodging, and testing will commence in Q3. For the field demonstration currently in progress, the system continues to be monitored and is achieving system COPs over 2. Metering and monitoring will begin in Q3 at the second demonstration site. The field test interim draft report is expected at the end of Q3.
	Complete the market characterization and integrate learnings into the program's Market Transformation theory and intervention strategy.	Integrate learnings from market characterization and internal synthesis session to update MT Theory and Logic Model.	Complete study and hold internal synthesis session	On target	The Market Characterization of Commercial Water Heating Systems in Select North American Regions has been completed in partnership with the North American Gas Heat Pump Collaborative, with a team synthesis session planned for Q3. The findings will be integrated into the program's Market Transformation theory and Logic Model, as well as overall program strategy. The program has also launched a Limited RFP for the Commercial Dual Fuel & Electric Water Heating Market Characterization Study, targeting work to begin in Q4 2026.
	Engage manufacturers and key stakeholders to refine channel development interventions.	Initiate manufacturer and key stakeholder engagement plans by end of Q3.	Finalize manufacturer and key stakeholder engagement plans by end of Q3	Heads up	The program awarded the Program Engagement Support work in Q2, which will formalize engagement strategy with upstream and midstream market actors, strengthen relationships, and seek to identify opportunities to support commercial water heating advancement in the Northwest. Manufacturer and Key Stakeholder Engagement Plans are on track to be finalized by the end of Q3. Engagement Plan facilitation will not initiate until Q4.

Infrastructure

Initiative Name		Manager	Fuel Type	Initiative Goal	
Infrastructure Programs	BetterBricks	Josh Pelham	Electric	To support the alliance’s commercial and industrial programs by fostering market relationships and providing tools and resources to help raise market awareness and capability for energy-efficient products, services and practices.	
	2026 Operations Plan Milestones	Target	Threshold	Status as of 8/24/2026	Comment
	Increase BetterBricks brand awareness and audience reach.	Increase website traffic by 12% year-over-year.	Increase website traffic by 8% year-over-year.	On target	Due to a big increase in BetterBricks events and the initial launch of a regional HVAC campaign in Q2, the BetterBricks website saw a 24.1% increase in traffic compared to Q2 2025. The team expects this number to continue to grow in Q3 as in-market activities and the HVAC campaign continue to ramp up.
	Influence commercial building industry perspectives and practices.	Engage in 15 market events, including hosting or cohosting at least two. Publish 12 pieces of original content."	Engage in 10 market events, including hosting or cohosting at least one. Publish eight pieces of original content"	On target	BetterBricks and NEEA's commercial programs participated in 13 industry events in Q2, including: - Three events with regional IFMA organizations (IFMA OR & SW WA and IFMA Seattle), including two expo-style events and one lunch and learn spotlighting advanced performance DOAS. - Attendance and a lighting presentation at the Northwest Facilities Expo in Portland, OR. - Attendance and sponsorship at two Seattle 2030 events: the Vision Awards and Energy Week, including co-hosting a building tour at the Metropole building in Seattle with University of Washington's Integrated Design Lab. - Hosting a booth at NEEA's regional Efficiency Exchange conference in Boise, ID. An additional 10 events are currently being planned for in Q3. Four new resources were added to betterbricks.com in Q2, including: - One video and print case study featuring luminaire level lighting controls at a K-12 school in Vancouver, WA. - One new BetterBricks Industry Voices article featuring a lighting expert discussing the community impacts of lighting upgrades. - Two fact sheets, including one covering multi-pump booster systems and another discussing code compliance requirements of the Fan Energy Index (FEI).