



Regional Portfolio Advisory Committee

Q3 2026 Meeting Notes

September 1, 2026

12:30pm – 4:00pm PST

Online Only

Meeting Attendees

Committee Members:

Andy Paul, Avista
Robert Frost, Benton Public Utility District
Phillip Kelsven, Bonneville Power Administration
James White, Chelan Public Utility District
Bill Hibbs, Clark Public Utilities
Billie McWinn, Idaho Power
Kevin Smit, Northwest Power and Conservation Council
Leigh Chaffey, NorthWestern Energy

Lauren Kerr, Portland General Electric
Jeff Tripp, Puget Sound Energy
Lori Moen, Seattle City Light
Emily Kubiak, Snohomish Public Utility District
Lis Saunders, Tacoma Power (interim)
Gemma O'Connor, Tacoma Power
Emily Gilroy, Washington Utilities and Transportation Commission

NEEA Staff: Alex Merrill, Alexis Muench, Alisyn Maggiora, Becky Walker, Brandon Lindquist, Britt Cutsforth Dawkins, Emily Moore, Emily Rosenbloom, Nathan Martinez, Nick Leritz, Stephanie Quinn, Mark Rehley

Resources

- Agenda Packet: [Q3 2026 RPAC Agenda Packet](#)
- Slide Deck: [Q3 2026 RPAC Meeting Slides](#)

Welcome, Introductions & Agenda Review

Alisyn Maggiora (amaggiora@neea.org) welcomed four new RPAC members: Leigh Chaffey of NorthWestern Energy, Robert Frost of Benton Public Utility District, Emily Kubiak of Snohomish Public Utility District, and Gemma O'Connor of Tacoma Power. She then went through the agenda and the packet, which had a memo for each agenda item plus updates on the stakeholder satisfaction survey, upcoming program expansions, the Heat Pump Water Heater Work Group, the other electric committees, and the Q2 2026 Market Progress Report.

Round Robin Updates

Leigh Chaffey (NorthWestern Energy): Leigh recently joined NorthWestern Energy's energy efficiency and demand side management team. On the Black Hills Corporation merger, federal approval is in hand and the Montana Public Service Commission looks to be the last one left to sign off. The team is working through Integrated Resource Plan comments, which is taking up a lot of bandwidth, and the utility is still working through equity challenges.

Emily Gilroy (Washington Utilities and Transportation Commission): Emily works on the Commission's planning team. It presents its findings on the biennial conservation reports at a recessed open meeting next week.

James White (Chelan PUD): The Student Energy Manager Program is going very well. More than thirty students have been hired, and commercial buildings are seeing savings of twenty to fifty percent. Students pull the utility's automated metering data to review bills and load profiles, walk buildings with customers, find equipment running when it shouldn't be, and check back later to make sure the changes stuck. The contracted firm is paid on performance, about five cents per kilowatt-hour saved, and pays the students out of that. There is now a how-to guide, and Jim offered to share it with any utility wanting to do the same.

Kevin Smit (Northwest Power and Conservation Council): The Council has released the draft Ninth Power Plan for comment. Comments so far have been substantial; the period closes October 16. Two public sessions will be held in every state over the next month and a half. The draft calls for a lot of new resources of every kind, wind, solar, natural gas and conservation, as regional loads grow.

Lauren Kerr (Portland General Electric): Lauren manages PGE's strategic innovation portfolio, the utility's process for validating new technology. Much of that work is now evaluating artificial intelligence tools and building the governance to adopt them responsibly. The utility has been working on its 2026 virtual power plant multi-year plan and sees a link between NEEA's work and scaling that plant, along with updates to its programs, pilots and planned demonstrations.

Billie McWinn (Idaho Power): With the Regional Technical Forum's updated protocols in place, Idaho Power got its energy advisory group to agree to run the residential new construction program as-is through 2027 and watch what happens, with changes possible starting in 2028. The program probably will not be cost effective this year and may not be next, so the agreement buys time to understand impacts before changing anything. The utility also got alignment to drop the participating contractor requirement from its ductless heat pump measure, which should bring in more participation. The smart thermostat demand response program has launched and is beating the conservative estimates. Idaho Power pays \$50 upfront to enroll. There was some concern that worried people would sign up and immediately drop out, but only about three percent left before the first event. The program opened to Google Nest the day of the meeting once agreements were finalized, and since Nest has the largest share of thermostats in the territory, participation should climb quickly. Engine block heater controls went to the advisory group with good savings behind them, and Idaho Power hopes to launch an offering. On the commercial and industrial side, Idaho Power is launching its midstream program and moving most non-lighting retrofit measures into it. After about a year of conversations with its advisory group, it has also moved to blended baselines so it can incent measures where gas is available or already in use. The utility used to avoid these to stay conservative on fuel switching, but large customers were electrifying anyway and asking for incentives to do it efficiently. The change meant rebuilding the technical reference manual and affects commercial new construction, commercial retrofit and multifamily, with implementation expected in September.

Lori Moen (Seattle City Light): Seattle City Light has its first budget increase in a long time across the demand-side management portfolio, including four or five new positions in program management and about eleven across cross-functional teams. Planning for 2027 and 2028 is underway to match. Fuel switching is still a challenge, and the utility keeps setting up interlocal agreements and memoranda of understanding with partners. The bigger problem is incentive delivery. The vendor has mothballed City

Light's program and project tracking system and is moving the utility onto a new one, so several interim fixes are in place, including part of the Resource Innovations platform for residential heat pump rebates. City Light is now running downstream rebates, an externally delivered rebate, midstream rebates on two separate contracts, its own internal system, and other offerings through third parties. About half of what used to be an in-house portfolio is outsourced. Data tracking and keeping service delivery running are the hard parts. Lori asked how others are future-proofing systems that support several incentive delivery models at once. Targets look good, though, and the utility may hit its number this year. Over the last seven years the roughly twenty-person program management team has been fully staffed for a total of four months. Full staffing is expected by the end of October.

Lis Saunders (Tacoma Power): Lis introduced Gemma O'Connor, who joined the residential Customer Energy Solutions team two weeks ago as its new planner and will likely take over the RPAC seat. Gemma came from Tacoma Power's energy resource planning and evaluation group, where she modeled hydropower resources in a changing climate for the Integrated Resource Plan, and before that spent several years researching climate change in academia. Rate increases in 2027 and 2028 are bigger than usual, just over six percent for residential, about eight percent for small business and eleven percent for general business. The utility is holding public meetings and doing outreach ahead of the change, especially with school districts, which will feel it. The other challenge is a drop in the conservation target. Tacoma Power is working to avoid overshooting on savings and to right-size programs by adjusting incentives and capping business incentives instead of paying a flat rate per kilowatt-hour. On the business side, the utility is designing an industrial curtailment pilot for one customer, looking at how House Bill 1185 and the mercury fluorescent phase-out will change its lighting program, signing more customers up for Energy Smart Industrial, Bonneville Power Administration's industrial strategic energy management program, and managing the process and customer contact with the Department of Commerce on Clean Buildings early adopter incentives. On the residential side, a second round of Commerce Home Electrification and Appliance Rebate funding will put heat pumps and hybrid water heaters into income-qualified homes, including a carve-out for adult family homes, a group the utility has always found hard to reach. A smart thermostat demand response program is in design with an ambitious fall 2027 launch, and a demand response communications strategy is in the works. Tacoma Power was also awarded just over \$400,000 from Commerce to study whether a virtual power plant would work in its territory, with a final report due mid-November.

Andy Paul (Avista): Andy, an energy efficiency engineer at Avista, sat in for Reuben Arts. Avista is moving ahead with an energy concierge program and a distributed energy resources program, plus several pilots, including compressed air leak detection and an advanced rooftop unit and controls pilot that has not come along as fast as hoped. The utility hired a regional account executive covering the territory south of the river from Spokane to the Idaho border, and added a policy analyst and a manager.

Robert Frost (Benton PUD): Robert supervises Benton Public Utility District's residential, commercial, industrial and agricultural conservation programs, plus its solar program, which has slowed down a lot and freed up capacity for other work. Customer newsletters about the low-income program brought a strong response, with calls every day and a growing wait list for heat pumps, windows and insulation. Benton is working to launch a demand response pilot, starting with agricultural pumping loads since the utility peaks in summer, and extending to commercial and residential later. It is also putting together a generator how-to guide for customers covering what to look for, how to size one and how to install it.

Discussion

Billie McWinn (Idaho Power): We have done irrigation demand response for more than twenty years. It is the biggest single piece of our portfolio at roughly 290 megawatts. Happy to connect Benton PUD with someone on our programs team if you want to talk it through.

Robert Frost (Benton PUD): We met with Idaho Power's team right after Efficiency Exchange and have used a lot of their materials. We are building on what Idaho Power has already done and adapting it for our area.

Jeff Tripp (Puget Sound Energy): Jeff manages PSE's demand response and trade ally network teams. On energy efficiency, the utility launched a quality installation pilot, called the measured savings residential pilot, to test whether better heat pump installations actually save more. Six installers have signed up against a target of 500 installations over the coming year. Smart thermostat savings for residential homes essentially go away next year, so the utility is looking at how to incent thermostats for customers who enroll them in demand response, and possibly time-of-use programs, on the view that residential demand response does not work without them. PSE is working through the short list from its demand response request for proposals and expects to start contract negotiations in a couple of weeks. The solicitation drew twenty-three intents to bid and eleven actual bidders offering roughly a gigawatt of capacity, though a lot of it overlapped. All of this ties into the utility's multi-year general rate case, where rebuttal testimony is underway on demand response expansion, time-of-use implementation, electrification programs and thermal energy networks. Under RCW 80.86 the utility is also moving from an integrated resource plan to an integrated system plan and working out what the preferred portfolio looks like across energy efficiency, demand response and distributed energy resources. A first look was due to its conservation resource advisory group the next day and its resource planning advisory group after that.

Bill Hibbs (Clark Public Utilities): Clark Public Utilities' prescriptive retro-commissioning program is still promising. A school district wants to do all of its sites, and the utility is adding resources to keep up. Bill said he would not be surprised if retro-commissioning pulled some participation away from strategic energy management, since it is a shorter commitment. Coordination has slowed the first projects more than measurement and verification questions have. Where gas-side work is happening at the same site, the electric-side changes have to wait so the gas data is not skewed. The first energy design assistance project is still on track for the fourth quarter, though working out how projects get reported has been a long road, which Bill said is normal for a new program. Both are good problems to have. Clark is also running a lighting promotion for K-12 public schools in the county, pairing the standard commercial lighting incentive with a promotion covering the rest of the cost, so projects are free to the district. Surplus budget let the utility move it up from a planned January launch. The focus right now is gymnasiums, exteriors and common areas to keep disruption down, with a broader rollout covering any scope next year, aiming to get districts onto LED before the 2029 mercury lamp phase-out. The utility is also considering a demand response pilot with its indoor agriculture customers, focused on curtailment plus a couple of bigger load-shifting events a year, and is working out what that load looks like and what it is worth so it can be priced. Early adopter incentives for Tier 2 customers are up significantly, which Bill put down partly to the utility's Tier 2 accelerator and partly to energy service companies helping customers get the documentation done, which is much lighter for Tier 2 buildings than Tier 1.

Phillip Kelsven (Bonneville Power Administration): BPA has a new administrator, who came from Montana and is a champion of energy efficiency, and a fairly new strategic plan aimed at transmission growth and probably generation growth. The agency has also renamed its energy efficiency function to conservation. Regional customer utility roundtables start in mid-September and run through November.

New residential measures take effect October 1. Regional Technical Forum measure development has been slow, so BPA built its own in the meantime. One is a cold climate heat pump measure backed by two years of the agency's own metering on fifty units, which gives real-world data and confidence in the savings. The other is a room heat pump measure, also called "saddlebag" heat pumps. They sit over a window sill with half outside and half inside, which makes them portable, easy to install, cost effective and a good fit for multifamily and older homes. BPA is deep in the Council's Power Plan and gathering feedback from its customers. The main concern is a draft proposal to split the region into eastern and western areas with different goals, savings and measures, which would create a lot of work and frustration for its utilities.

Emily Kubiak (Snohomish PUD): Emily is taking over the RPAC seat for Jeff Feinberg. The utility finished moving rebate applications online and can now take commercial custom projects, which it calls building efficiency, through the portal. Snohomish staff recently met with NEEA staff about a pilot for integrated luminaire level lighting controls and HVAC, with details still to work out. Mercury-containing lighting comes off the market in Washington in 2029, so Snohomish raised rebates for swapping T8 lamps for LED fixtures. It expects a lighting rush over the next year, which should head off last-minute replacements. The utility is also developing a rooftop solar program with financial support and rebates, which it does not offer today.

Housekeeping and Looking Ahead ([Slides 10-21](#) | [Packet 3](#))

Alisyn Maggiora went through the informational memos: the 2026 Stakeholder Satisfaction Survey, the gas Advanced Performance DOAS (dedicated outside air system) expansion, the Heat Pump Water Heater Work Group, highlights from the other electric committees, and the Q2 2026 Market Progress Report. The Advanced Performance DOAS expansion goes to the Natural Gas Advisory Committee for a vote in December. .

Emily Moore (emoore@neea.org) walked through the 2027 Operations Planning process. A draft plan goes to the Board, RPAC and NGAC by October 8, with an overview webinar October 15; meeting invites are out. Feedback is due November 2, giving members three weeks. The plan then goes to the Finance and Audit Committee on November 10 and to a vote at the December 3 Board meeting.

Emily also previewed the plan. Near-term savings come first again, with most investment in the mature programs carrying Cycle 7 and Cycle 8 savings: Heat Pump Water Heaters, Retail Products Portfolio, Extended Motor Products Pumps, and Luminaire Level Lighting Controls. Two electric program expansions will go to the Natural Gas Advisory Committee for advancement votes, with RPAC kept current on progress, changes and the co-funding share. Advanced Performance DOAS adds units paired with gas heating, voting Q4 2026. Luminaire Level Lighting Controls adds HVAC control, voting Q4 2027, which could bring electric savings on top of gas savings from less HVAC runtime. Starting in 2027, the gas portfolio co-funds BetterBricks at roughly fifteen percent, or about \$75,000. NEEA expects to advance at least one new electric program concept in 2027, weighing options in the second quarter. Variable speed drives and room heat pumps are under review.

Alisyn ran through announcements. The New Homes Workshop is Monday, September 14, 9:00am to 1:00pm at NEEA's office, hybrid option available. The goal is regional alignment on where new construction programs go next: performance path, prescriptive path, income-qualified versus market rate, and NEEA's role. Contact Tess Studley (tstudley@neea.org) to join. Leadership in Energy Efficiency Awards nominations run August 3 through September 18 at neea.org/leadershipawards, in three categories: Rising Star, Innovative Collaboration and the Tom Eckman Lifetime Achievement award. The Board Chair and Executive Director pick a Chairperson's Award separately. Awards are presented 9:00 to 11:00am on December 4, the second day of the Q4 Board meeting in

Portland. Partial nominations are welcome. The 2026 Stakeholder Satisfaction Survey runs September 28 to October 27 and takes ten to fifteen minutes. NEEA fields it about every two years; the last was early 2024. Results go to the Board in Q1 2027, followed by a funder roadshow.

The last RPAC meeting of 2026 is Monday, November 2. Anticipated topics include a 2027 Operations Plan feedback reminder, an update on the national Department of Energy cost-effectiveness work and the 2024 International Energy Conservation Code, a Northwest Online Marketplace update with demo of utility sites, and Natural Gas Advisory Committee vote updates. Other NEEA meetings coming up: the Natural Gas Advisory Committee webinar September 9, the Q3 Board meeting in Spokane September 17-18, the Regional Emerging Technology Advisory Committee September 30, Market Transformation 101 October 7, the 2027 Draft Operations Plan webinar October 15, now cut from three and a half hours to two and recorded, the Cost-Effectiveness and Evaluation Advisory Committee October 28, the Commercial and Industrial Coordinating Committee November 4-5, and the Residential Coordinating Committee December 1-2.

Proposed 2027 RPAC dates below; feedback is due October 1 – looking for any major conflicting organizational or industry events.

- Wednesday, March 3, proposed as hybrid
- Wednesday, May 5
- Tuesday, August 17
- Wednesday, November 10

The next Market Transformation 101 session is Wednesday, October 7, 9:00 to 10:30am, with a special feature on NEEA's Codes and Standards work; sessions are recorded, contact Alisyn Maggiora to join. Efficiency Exchange 2027 session topics can be submitted September 14 through October 16 at neea.org/EFX. EFX27 is May 18-19 in Wenatchee, Washington.

Milestone Vote [Efficient Fans Program \(Slides 24-39 | Packet 4-25\)](#)

Alisyn Maggiora went over the voting process. The roll-call vote comes after the presentation and discussion, and everyone who votes has to consent for a program to advance; abstentions and absences do not impact consent. A quorum (simple majority of committee members) was present. A member or delegate can vote yes in the meeting or in writing beforehand, but no and abstain votes have to be given live. A member voting no, names the concern and proposes a solution, and the program returns for a vote at a special webinar or at Q4 RPAC. If consent still cannot be reached, the RPAC Charter's Challenge Flag Process applies: the member writes a memo, NEEA sets up a facilitated discussion, and if that fails the Executive Director takes it to the Board. Results go to the Executive Director, then the Board, and are posted publicly. The four-week document review period exists to surface show-stoppers before the meeting.

Emily Moore (emoore@neea.org) thanked members for two quarters of review and for the meetings with their staff. That engagement, she said, is to ensure clarity and regional alignment, the main reason NEEA runs milestones through the vote process. NEEA started scanning commercial and industrial fans around 2018 and landed on the Fan Energy Index as the best system-level measure of fan performance at real operating points. The Department of Energy later adopted it as the official federal test metric, and manufacturers, the Air Movement and Control Association and others now treat it as the primary efficiency metric. NEEA moved the concept into the electric portfolio in 2023 and has since run research, refined the market transformation logic, and set the baseline and savings forecast. Program Advancement means NEEA has learned enough to sharpen the strategy, thinks the barriers can be addressed, accepts the risks, and is ready to work the market.

Roughly 20,000 fans sell in the region each year. Co-created savings potential is twenty-eight average megawatts over twenty years, on par with other commercial programs. The program works upstream with manufacturers to build the index into fan selection software, midstream with representatives and specifiers, and through codes and standards. Risk is average and cost effectiveness is high. Savings ramp slowly and start in 2030, which balances against mature programs delivering savings now. Savings potential splits roughly seventy percent industrial and thirty percent commercial. The program also broadens the portfolio past lighting and HVAC, opens a code-enabled savings pathway, and could scale further if it expands to other fan types.

Alexis Muench (amuench@neea.org) recapped the program approach: raise awareness and use of the index by working with manufacturers, representatives, specifiers, the Air Movement and Control Association and others. The leverage sits earlier than the end user, in specification and selection, including inside each manufacturer's selection software. Representatives have a lot of sway with specifiers over which fan gets picked. The index is more heard than seen: people know the term but do not consistently use it. Because the leverage comes before purchase, the work fits NEEA: regional influence on selection practices, awareness, and codes and standards. No single utility could take those barriers on alone. The goal is to shift the whole distribution: raise the floor by cutting low-index selections, and make high-index selections normal instead of just compliant. The target is fan efficiency twenty-five percent better than the 2021 baseline by 2041.

Alexis summarized RPAC's feedback. Members saw a good regional opportunity and a good fit for market transformation. Most comments asked for clarification rather than changes, so NEEA added context to the funder question and answer document and left the program documentation alone. Four themes came through. First, why the index and not a specific technology: it lets you compare fans on how they will actually be used, which keeps the program technology neutral. Second, how adoption gets tracked: it becomes a primary market change measured through Market Progress Evaluation Reports. Manufacturer sales data is the main source, backed by construction documentation, specification reviews, market actor research, and evidence FEI is turning up in selection software and purchasing decisions. All of that also refines the Regional Technical Forum measure. Third, what utilities do: few [utilities] use or promote FEI today, but the strategy does not depend on utility programs having related measures. Early work in Market Development is upstream and midstream. NEEA would like utilities to promote FEI and efficient fans through existing customer and trade ally channels and to look for chances to collect project-level data, but that is not an ask today and not a condition of advancing.

The fourth theme was a request about regional reach in rural communities and traceable benefits inside NorthWestern Energy's territory. Emily Moore said conversations with NorthWestern had continued through the week of the meeting and would keep going, and that the request had not made the funder feedback summary. NorthWestern wants specific activities, deliverables and results in its territory, partly because market change moves slower in rural or less populated areas like Montana, where different barriers push benefits further out. The Board knows this; it sits within Goal 4 in the current strategic plan on equitable distribution of benefits. NEEA is researching the question, and the Board will look at rural market research outcomes and recommendations and decide whether more specific rural market diffusion strategies or metrics are needed. That conversation starts in Q4 and carries into 2027 and the next business cycle's strategic planning.

The program aim is broad coverage wherever commercial and industrial fans are sold, so NEEA will look for representatives serving all four states. Market characterization found that the vast majority of fans sold in the Northwest are produced by Greenheck, Loren Cook, and Twin City Fan, so the program will work through their representative networks to build scale and ensure reach around the region. Emily said focusing on the reps is where NEEA can have the most leverage to influence the supply chain and fan purchase decisions, a common market intervention in other NEEA programs.

Alexis closed on what changes in Market Development. The program shifts from research to active market work, deepens manufacturer and representative partnerships, gives specifiers tools and education, keeps working with the Air Movement and Control Association on awareness and codes and standards, and builds up data collection to measure progress, support the Regional Technical Forum measure and inform future utility programs.

Alisyn opened the floor for questions before the vote. None came. The roll-call vote followed.

Roll-Call Vote: Efficient Fans ‘Program Advancement’ Milestone

- Avista – **Yes (registered by Andy Paul as delegate)**
- Benton PUD – **Yes**
- Bonneville Power Administration – **Yes (registered in the meeting chat after a connection drop)**
- Chelan PUD – **Yes**
- Clark PUD – **Yes**
- Energy Trust – **Yes (submitted in advance)**
- Idaho Power – **Yes**
- Northwest Power and Conservation Council – **Yes**
- NorthWestern Energy – **Abstain**
- Pacific Power – **Not Present**
- Portland General Electric – **Yes**
- Puget Sound Energy – **Yes**
- Seattle City Light – **Yes**
- Snohomish PUD – **Yes**
- Tacoma Power – **Yes**
- Washington Utilities and Transportation Commission – **Not Present**

The vote came in at thirteen yes, one abstention and two members not present. A quorum was present and everyone who voted consented or abstained, so the milestone passed and the program moves from Program Development into Market Development.

Discussion

Leigh Chaffey (NorthWestern Energy): NorthWestern is abstaining for the reasons we have already raised, and because we want to see more effort, or at least a strategy, for getting the edges of the region the benefits the rest of the region already sees, and sooner. We want to support the program, and our dissent needs to be on the record.

Alisyn Maggiora (NEEA): Understood. Thank you for abstaining so it can move forward. We are committed to working on this together to address NorthWestern’s requests where appropriate for NEEA at this time.

[RPAC+] Recap: 2026 Heat Pump Water Heater (HPWH) Level Up Marketing Campaign ([Slides 41-72](#) | [Packet 26-27](#))

Britt Cutsforth Dawkins (bdawkins@neea.org) presented results from the 2026 Level Up consumer campaign, which ran in June. Marketing and communications staff from several electric funding utilities joined for this part of the agenda.

Most of NEEA’s marketing is midstream. Consumer campaigns are recommended where there is a strategic opening to move the market, and awareness has been a barrier for HPWHs. In a simple three-stage funnel, the

awareness stage covers people who know HPWHs exist and not much else; a slight majority of Northwest consumers have some level of awareness now. Campaigns aim at awareness and at the next stage, consideration. Conversion takes time and comes down to local factors like rebates, availability, and installer confidence.

This was the third run of the Level Up creative, after 2024 and 2025. Targeting was widened to reach more Northwest electric customers, and NEEA has heard the ask about broadening regional reach across other programs. The campaign kept the same sixteen segments; four states each split into rural and urban and then split again into English and Spanish. In 2026, NEEA removed behavioral qualifiers such as interest in home renovation. The budget was split evenly between rural and urban again—even though rural is sixteen percent of the four-state population and urban is eighty-four percent—which puts more spend toward each rural consumer.

Clickthrough rate or CTR was expected to drop with wider targeting. It varies based on individual campaign targeting, media mix, messaging and timing, as this was the first summer campaign in five years. Across campaigns the CTR has climbed from below 0.20 percent in 2021 to about 0.60 percent on average over the last three years; there was no campaign in 2023. The 2025 peak came from tighter targeting plus the ability to market the \$2,000 federal tax credit, which expired at the end of 2025. The 2026 CTR drop was smaller than expected and still beat the 2022 and 2024 CTRs—even with the broader targeting.

NEEA tracks both initial ad clicks, which indicate awareness engagement, and subsequent clicks on the Level Up landing page, such as looking for utility rebates, or local installers or retailers. That second click on the landing page is considered a “marketing” conversion as it shows movement from awareness to consideration in the marketing funnel.

Takeaway #1: Interest in HPWHs remains above average, and particularly on Meta.

Meta, which owns Facebook and Instagram, is still the top media channel for both traffic and marketing conversions, delivering nearly ninety-eight percent of the total marketing conversions. Engagement in all four states slipped a little year over year, an industry-wide trend rather than a Meta problem. Display, audio, short-form video, and alternative social sites are still useful for top-of-funnel awareness. Consumer commentary has quieted down: the 2022 campaign drew a couple hundred comments, some heated, and this one drew thirteen.

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

On Meta, Washington is still most likely to click with a 0.99 percent CTR, then Oregon at 0.93, Idaho at 0.92 and Montana at 0.89 percent. Display is a different story, with Montana and Idaho leading at 0.16 and 0.13 percent and Washington and Oregon falling to 0.09 and 0.08 percent. Display a good awareness channel in those latter two states. Audio is measured by completed listens, not clicks. The average Meta CTR was 0.94 percent. The reducing energy waste theme, which lines up with a current Department of Energy talking point, was introduced during the 2025 campaign and performed well. Do-it-yourself messaging was tested in 2025 but replaced in 2026 with owner satisfaction messaging pulled from the HPWH program’s most recent Market Progress Evaluation Report. Britt reminded attendees that every message goes through the RPAC+ process, where each electric funding utility reviews it before the campaign elections and run dates.

Idaho had a 0.92 percent CTR on Meta. Display brought cheap traffic and click efficiency held steady from 2025 even with the wider targeting. Idahoans converted most after clicking on waste reduction, affordability, and customer satisfaction messaging. Technology messaging drew interest but fewer conversions, and the urban-rural CTR gap narrowed. .

Montana held display engagement at nearly its 2025 rate, and urban Montana's display CTR was more than double the combined display CTR of every other rural and urban Northwest segment. Rural Montana produced most of the state's marketing conversions. Montanans went for practical benefits and conversion messaging focused on affordability, then waste reduction, then owner satisfaction.

Oregon responds well to technology messaging on the first click, which suggests people there are curious about how the product works. Urban Oregon engaged strongly, and the state has engaged consistently across campaigns with no single message standing out. Britt noted Oregon appears to be the only state with a Water Heater Specialty Installer license, which lets holders install water heaters (including HPWHs) under a journeyman plumber's supervision. As of 2025, forty-one percent of the installers Hot Water Solutions works with are HVAC firms that moved into plumbing. Oregon's best conversion messaging was affordability, then owner satisfaction, then technology.

Washington consumers are still most likely to click of all the state segments and in the 2026 campaign had the highest click-to-conversion rate at 0.74 percent, which fits a market further along the adoption curve. Display is a reach tactic there, not an action tactic. Washington's urban consumers were especially engaged and more focused on affordability than rural ones. Washingtonians responded very well to the gamer-leaning calls to action, "Customer-Approved? Game On" and "Efficiency Mode: Activated." Washington converted most frequently with owner satisfaction, then efficiency, then 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.

Urban consumers clicked more on Meta, 1.02 percent CTR against 0.87 percent CTR for rural, and that gap narrows every year. Display reverses it, rural at 0.11 percent CTR and urban at 0.10 percent CTR. Messaging responses were close with no clear winner, which Britt put down to three years of testing and dropping the weakest performing messaging. She recommended running different messaging so that target audiences can respond to the version most relevant to them. On the landing page, finding rebates was far and away the top action or marketing conversion for both rural and urban groups. On the campaign landing page, rural audiences had the higher click-to-conversion rate, 0.65 percent against 0.59 percent.. Rural also had a wider range of interest in the different marketing conversion options, with about twenty-five percent of rural conversion clicks going to non-rebate options against eighteen percent for urban. Nearly three percent of rural clicks went to finding an installer, against less than one percent of urban.

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

On Meta, English and Spanish were close at 0.95 and 0.92 percent CTR, and the drop from wider targeting hit English audiences harder. Two Spanish ads came in above a 1 percent CTR, which no English ad did, and the strongest single click response of the campaign came from Spanish audiences on the energy efficiency ads. On display, Spanish audiences had a CTR of more than double the English CTR, well above the usual display benchmark of roughly 0.05 to 0.10 percent. Reducing energy waste was narrowly the strongest theme for English audiences, While Spanish audiences engaged most with energy efficiency and least with reducing energy waste. Britt flagged one interesting note about the Spanish : the two waste reduction messages had some of the lowest click-through rates on Meta but the most post saves, possibly worth trying save-for-later messaging or channels like Pinterest in future campaigns.

For 2027, the HPWH Operations Plan will propose a new proactive replacement consumer campaign aimed at driving more Northwest consumers from awareness to the consideration stage. Creative direction, media spend and targeting are still to be set. NEEA conducted an RFP and selected a heat pump water heater marketing

contractor just the previous week. Britt asked members to keep NEEA posted on marketing opportunities in their territories so regional and local efforts line up.

Discussion

Lauren Kerr (PGE): Will the state-level findings shape personas or messaging for future campaigns beyond heat pump water heaters?

Britt Cutsforth Dawkins (NEEA): In my five years here everything has been regional, very high level, and I wanted to change that in 2026. Jeff Feinberg [of Snohomish Public Utility District] asked months ago whether we could get more out of the data, which helped prompt this. I hope it is useful to your marketing teams, and that it helps NEEA target more precisely with HPWH campaigns.

David Murphy (BPA): One of the messages was environmental, but it did not show up in any of the state slides [in the 2026 campaign]. Did I read that right?

Britt Cutsforth Dawkins (NEEA): Right, Montana preferred practical benefits over environmental framing, and we have not run environmental messaging for two years now. It just is not a top benefit for these consumers. They care about cost and about using less energy.

David Murphy (BPA): The work group is planning on the federal standard landing in 2029. How does this marketing strategy connect to that?

Britt Cutsforth Dawkins (NEEA): That is one of the first things we want the new marketing vendor to work on, a plan that bridges early 2027 to 2029. Manufacturers are telling us they will start messaging through retail in 2028, so 2027 is our year to get alignment on the go-to-market approach. We still meet installers who have not heard of the standard, so we will keep educating them. We'll have two case studies coming out this year featuring Northwest installers who are already getting comfortable selling and installing HPWHs. We will keep working with the supply side while running consumer campaigns around early proactive replacement of existing water heaters.

Meeting Wrap Up

- Public comment – None
- Meeting feedback – Members thanked NEEA for breaking the campaign results out by state, rural and urban, and English and Spanish.
- Action Items
 - **ACTION:** Committee members will send Alisyn Maggiora any feedback on the proposed 2027 RPAC meeting dates by October 1.
- Next meeting
 - November 2, 2026 - virtual