This meeting will be transcribed for notes

Natural Gas Advisory Committee

Q4 2026: Thursday, October 22

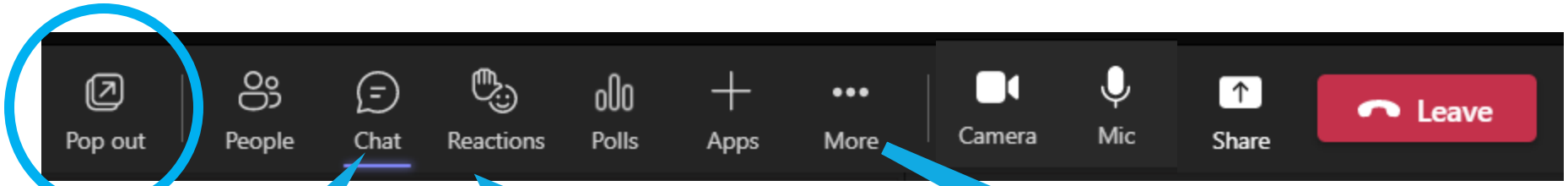
9:30am – 12:00pm (Pacific)

Virtual Meeting



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Tools for Today: Engaging on Teams



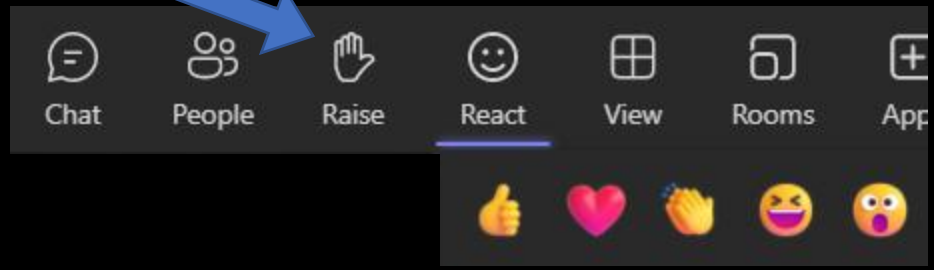
The chat is not captured automatically.

Do you have any accessibility challenges with this technology today?

Comments/Questions?

Please raise your virtual hand or chime in

Chat & reactions also welcome



"…" More includes:

- ✓ Settings: mic & video
- ✓ Background effects

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Heads Up!

“Spotlighting” Speakers



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Reminder of NGAC Purpose & Role







Purpose

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

Responsibilities

- Portfolio optimization & program advancement (milestone votes)
- Coordinate downstream marketing
- Monitor outcomes of relevant workgroups & Cost-Effectiveness Committee (CEAC) meetings
- Advises NEEA's Executive Director on portfolio decisions

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Agenda

All Times Pacific

9:30-9:50	**Welcome, Agenda Packet Review, Introductions**
9:50-10:10	**Committee Round Robin**
10:10-10:30	**Housekeeping, Looking Ahead**
10 min	**BREAK**
10:40-11:10	**[Vote Prep] Program Expansion: Gas Advanced Performance DOAS**
11:10-11:45	**Portfolio Report Highlights**
11:45-11:50	**Public comment, wrap up and adjourn**



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Packet Review & Informational Updates

Tier 1: Agenda Items

- ✓ *Gas AP DOAS Program Expansion Vote Prep (pg. 3)*

Tier 2: Informational Updates

- ✓ *LLLC+HVAC coordination opporutnities (pg. 17)*

Tier 3: Additional Resources

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

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Introductions

- **Name**
- **Organization**
- ***And…***



What's the best and/or worst item (candy or otherwise) you received in your trick-or-treat bag?



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Round Robin Updates

Focus: Organizational & program highlights

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

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Housekeeping

- *Product Council Updates*
- *Past Meeting Notes (September webinar)*
  - ✓ No action items; any questions/ follow up?
- *Updates*
  - ✓ Check in on Informational Memos
- *Announcements & Reminders*
  - ✓ 2027 Operations Planning Reminders
  - ✓ Leadership in EE Awards (Dec 4)
  - ✓ Stakeholder Satisfaction Survey (Oct)
  - ✓ 2027 Efficiency Exchange Ideas
  - ✓ Upcoming Meetings, 2027 NGAC Dates
  - ✓ Other regional / industry events



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Product Council Updates

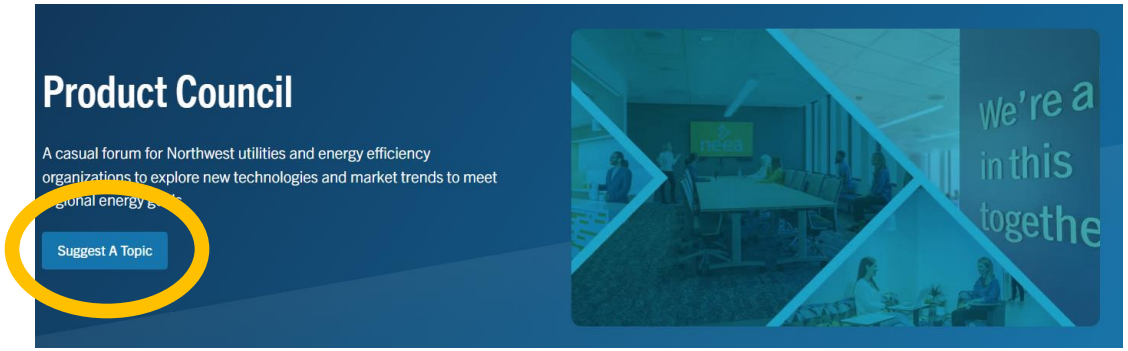
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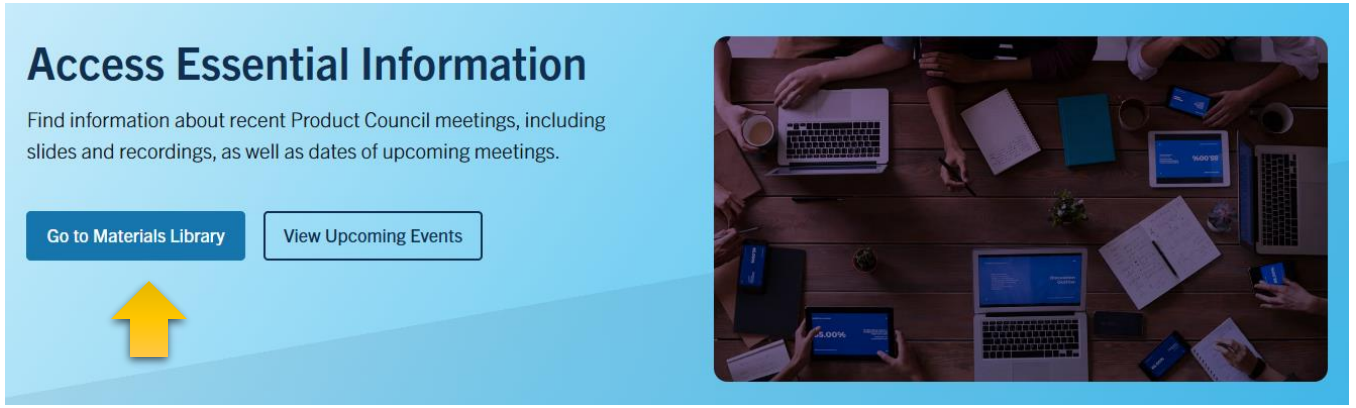
Ncontreras@neea.org

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Product Council







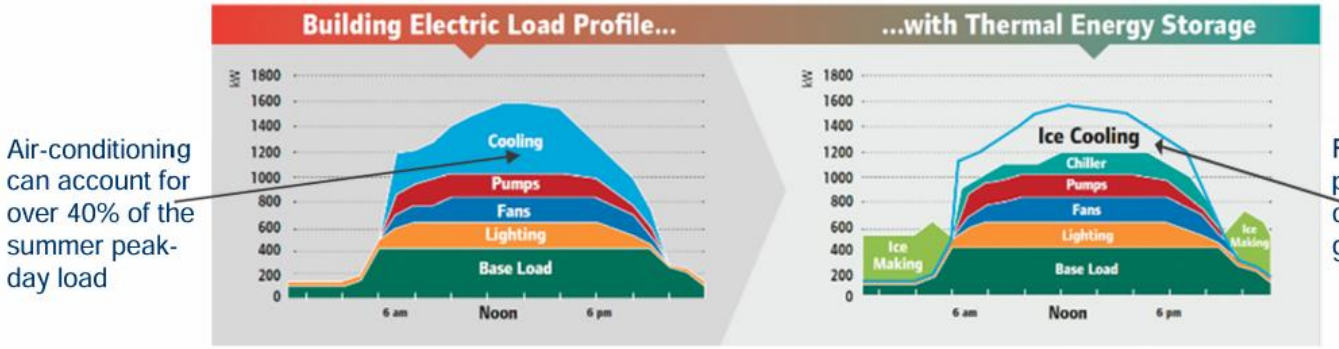
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HVAC Thermal Storage for Enhanced Heating & Cooling – Larger Buildings

Flexible to interact with the Grid

- ✓ *Shifting*
- ✓ *Space – Size*
- ✓ *Low ambient supplemental*

Shift Demand by Cooling with Thermal Storage



Air-conditioning can account for over 40% of the summer peak-day load

Reduced need for peaking plants & other redundant grid infrastructure

Thermal storage meets grid challenges

- Addressing **critical** utility/grid peaks
- Avoid **expensive** and **high-emission** peaker plants
- Supporting **advanced grid services** and **demand response**





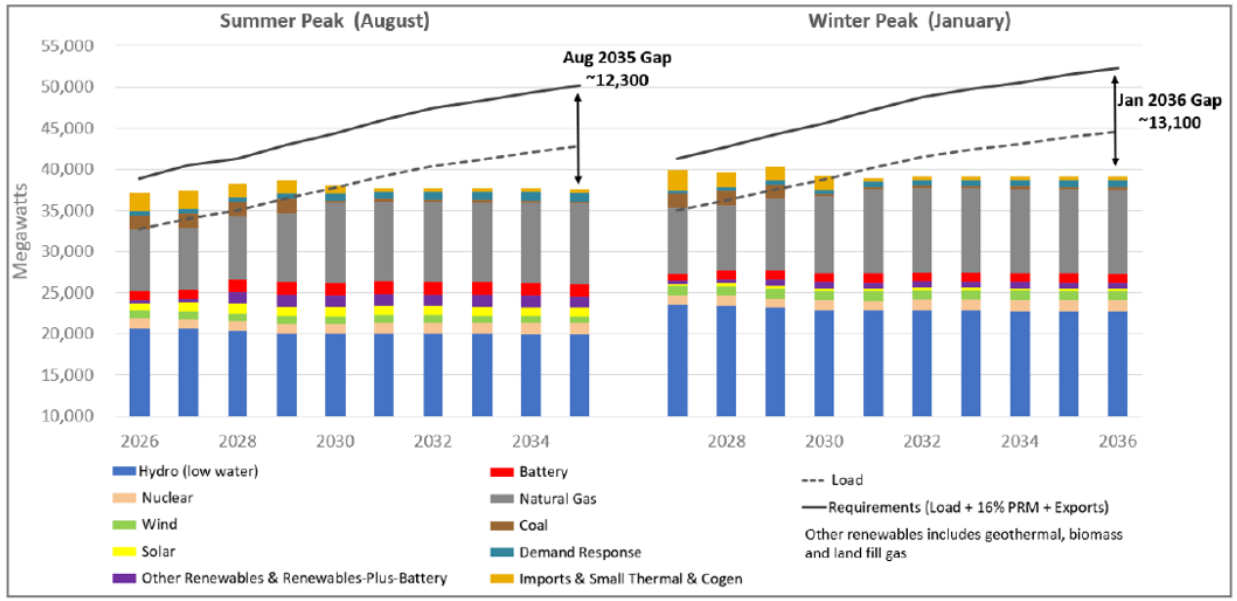
[Product Council Materials]

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2026 Integrated Design Lab (IDL)

Capacity gaps in both summer and winter

Figure 2: Summer and Winter Peak Hour Picture



Source: PNUCC 2026 Regional Forecast

- REGIONAL IMPERATIVE
  - Northwest electrification and industrial growth are increasing winter and summer capacity risk. Efficiency, load flexibility, and dual-fuel strategies can reduce resource-adequacy needs while supporting affordability and decarbonization.

Product Council Material

2026 Integrated Design Lab (IDL)

Climate + systems testing

Energy codes, psychrometrics, embodied carbon, cold-climate IAQ and heat-recovery technologies

Low-carbon prototyping

Façade retrofits, full-scale prototypes, human factors, residential efficiency and acoustics

Modeling + technology outreach

Economic energy modeling, lifecycle analysis, windows, PoE lighting and residential HVAC/IAQ

Implementation + standards

Market-specific tools, whole-building decarbonization and building-performance standards

Human-centered deployment

Occupant engagement, human-building interfaces, program evaluation and industry partnerships

The regional IDL network was first established with support from NEEA and has existed for nearly 20 years. IDLs exist at Universities of Idaho, Oregon and Washington and at Montana and Washington State Universities and play a critical role in advancing energy-efficient design and building performance across the Northwest.

Product Council Material

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Financing Market Transformation

THE PROBLEM

Load growth is outpacing conventional grid expansion, while cost-of-service regulation rewards capital investment more directly than lower-cost alternatives.

THE THESIS

Efficiency, storage, demand flexibility, and virtual power plants can provide capacity faster, but need financing structures that allocate risk and repayment.

THE OPPORTUNITY

Treat buildings and distributed equipment as grid resources, directing capital toward avoided cost rather than infrastructure ownership alone.

- Proposed Delivery Models
  - Innovative Rate Design
  - Data center tariff + Virtual Power Plant Access
- Desired Outcome
  - Scale distributed capacity quickly, reduce pressure on customer rates, create a utility earning pathway, and give private capital a bankable route to deployment

Product Council Material

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Commercial Secondary Windows – A Solution for Existing Buildings

- Commercial secondary windows unlock a scalable retrofit path
  - Rather than replacing the existing window or glazing, add an additional frame and glazing layer that creates an insulating air space between the existing and new window
  - As an alternative to window replacement, Secondary Glazing Systems (SGS)



WHY IT MATTERS

~⅓
of full window-replacement cost

59–64%
U-factor reduction over single-pane windows

10–20%
whole-building air-leakage reduction in field results

- What enables scale
  - Count air sealing in TRMs and cost-effectiveness models
  - Bundle CSW into multi-measure commercial retrofit packages
  - Build confidence through pilots, local proof points, rated products, and installer/specifier education
- Bottom Line
  - CSW can deliver replacement-like benefits with less cost and disruption, but market growth depends on recognizing air-sealing savings and accelerating regional adoption.

Product Council Material

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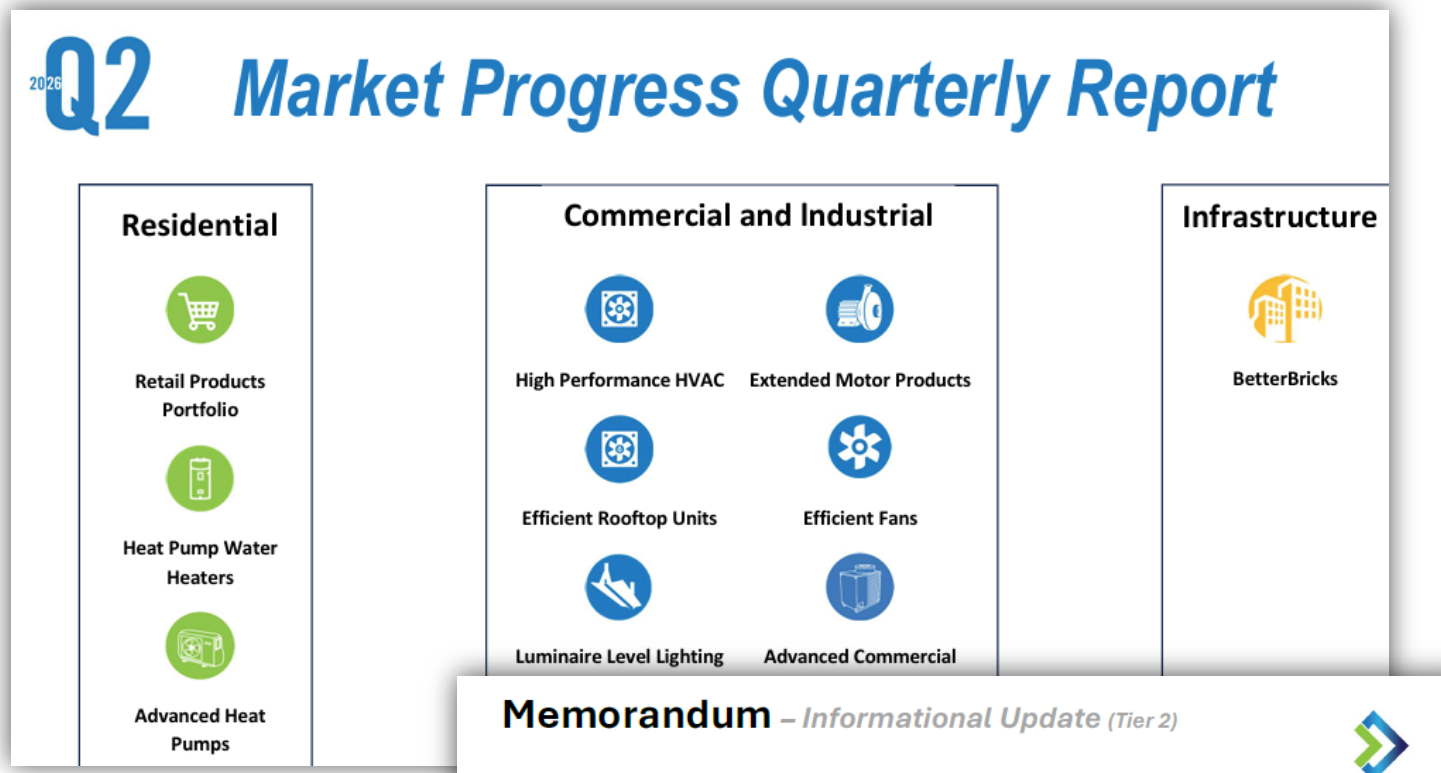
Past Meeting Notes

- Sept 9 webinar
  - Key topic: LLLC+HVAC opportunity and pilots
  - No action items
  - Link to notes: https://neea.org/resource/q3-2026-ngac-webinar-meeting-notes/

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Informational Memos

- ✓ *LLLC + HVAC pilots (pg. 17)*
- ✓ *Reminder: Q2 Market Progress Report (9/9 packet)*



Memorandum – *Informational Update (Tier 2)*

October 15, 2026

TO: Natural Gas Advisory Committee

FROM: Suzi Asmus, Principal Program Manager, Luminaire Level Lighting Controls

SUBJECT: Luminaire Level Lighting Controls + HVAC Field Pilots

Our Ask of You:
Share the information in this memo with the relevant stakeholders in your organization for awareness of these efforts.

Brief Overview:
At the Q3 meeting (held Sept 9th), the Luminaire Level Lighting Control program informed this Natural Gas Advisory Committee about the work the team will be doing throughout the coming year to develop a program expansion opportunity, aiming for a Program Advancement vote in Q4 2027. The expansion opportunity builds on the existing electric LLLC program by adding a simple integration pathway between lighting occupancy sensors and commercial roof top units (RTUs) through a thermostat or other controls device to reduce HVAC run time.

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2027 Operations Planning Underway

Timing	What to Expect
10/8/26	Draft Ops Plan Emailed to the Board, RPAC, NGAC
10/15/26	**Draft Ops Plan Overview Webinar**
11/2/26	Feedback due from Board + Committee Members
11/10/26	Finance & Audit Committee Meeting
12/3/26	December Board Meeting (vote on 2026 Ops Plan)

*** Timeframe for NGAC review and feedback**

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LEADERSHIP IN ENERGY EFFICIENCY AWARDS

Help us honor the innovators and collaborators driving energy efficiency across the Northwest and beyond.

NEEA will recognize individuals and teams for their exemplary dedication and performance in the industry.

EVENT: 9-11 a.m. Dec. 4

REGISTRATION: Opens week of Oct. 26

MORE INFO: **neea.org/leadershipawards**

Nominations

Aug 03
Through
Sept 18

Event

Dec 04



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Reminder: 2026 Stakeholder Satisfaction Survey

- ***Goals:***
  - Solicit feedback on stakeholders' experience working with NEEA staff; participating in NEEA forums
  - Build understanding of stakeholder needs
- ***Timeframe:***
  - Sept 28 - **October 27**, 2026
- ***Link:***
  - 2026 NEEA Stakeholder Survey
- ***Follow up:***
  - Q1 2027: Present results to Board
  - Anticipate roadshow in Q2-Q3 2027



Conducted approx. every 2 years with all board and committee members

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Efficiency Exchange 2027



Submit Ideas for Session Topics

Deadline: October 23

neea.org/EFX

Save the Date for EFX27

May 18-19

Wenatchee, WA

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Upcoming 2026 NEEA Committee Meetings

NGAC

QTR	DAY	DATE	HOLD TIME	LOCATION	KEY TOPICS / NOTES
Webinar	Wed	Dec 9	1-2pm	Virtual	Adv Perf. DOAS (gas) milestone *vote*

Other

Thurs/Fri Sept 17-18	Q3 Board Meeting (Spokane, WA)
Wed Sept 30	Regional Emerging Tech Adv. Cmtee
Wed Oct 7	NEEA / Market Transformation 101
Thurs Oct 15	2027 Draft Operations Plan Webinar
Wed Oct 28	Cost Effectiveness & Eval. Adv. Cmtee
Wed/Thurs Nov 4-5	C&I Coordinating Committee
Tues/Wed Dec 1-2	Residential Coordinating Committee

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2027 Planned NGAC Dates

Now going to Board for approval

QUARTER	DAY	DATE	HOLD TIME (Pacific)	LOCATION
Webinar	Wed	Jan 27	1-2pm	Virtual
Q1	Thurs	Mar 18	9am-4pm	Virtual
Webinar	Thurs	Apr 15	1-2pm	Virtual
Q2	Tues	June 1	9am-4pm	**Hybrid (Seattle)**
Webinar	Wed	Sept 22	1-2pm	Virtual
Q4	Thurs	Oct 28	9am-4pm	Virtual

= Proposed Hybrid / In-person Option

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Other regional / industry events or announcements?



[Check out the EFX26 photo highlights here!]



Lisa Grow

CEO & Pres., Idaho Power

EFX 2026, Boise

Let’s take a break!



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Program Advancement:

Expansion of Advanced Performance DOAS program into the Natural Gas Portfolio



Emily Moore

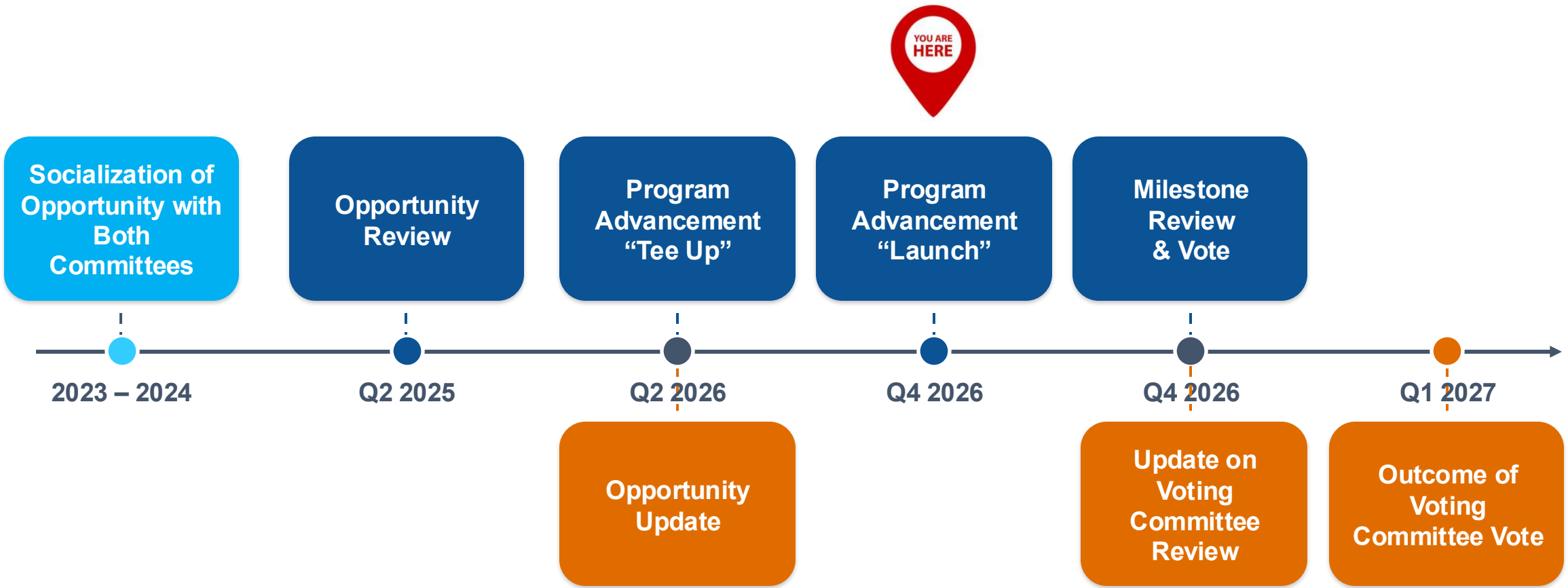
Director, Market Strategy & Execution

Dave Hammond

Manager, Program Management

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Stakeholder Engagement Touchpoints and Timeline — AP DOAS



Voting Committee (NGAC)

Reviewing Committee (RPAC)

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Program Advancement Review Timeline

10/22: Program Advancement Launch

10/28: Cost effectiveness assumptions and baseline reviewed at CEAC

10/29-11/18: NEEA/Utility Huddles

11/18: NGAC feedback due

12/9: Program Advancement milestone vote

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Program Advancement Proposal

Program Overview	Key Learnings	Market Transformation Theory
Product Definition	Market Description	Intervention Strategies
Investment / Return	Portfolio Fit	Program Risk Summary

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Advanced Performance DOAS Market Transformation Theory



Opportunity

Pair high efficiency heat recovery ventilators with high efficiency heating and cooling equipment while following design principles to realize deep commercial HVAC energy savings and improved IAQ



Barriers

- Lack of awareness

- System complexity and resistance to change



Interventions

- Educate and provide technical support to designers/specifiers

- Market system approach and benefits

- Provide evidence to influence national model codes

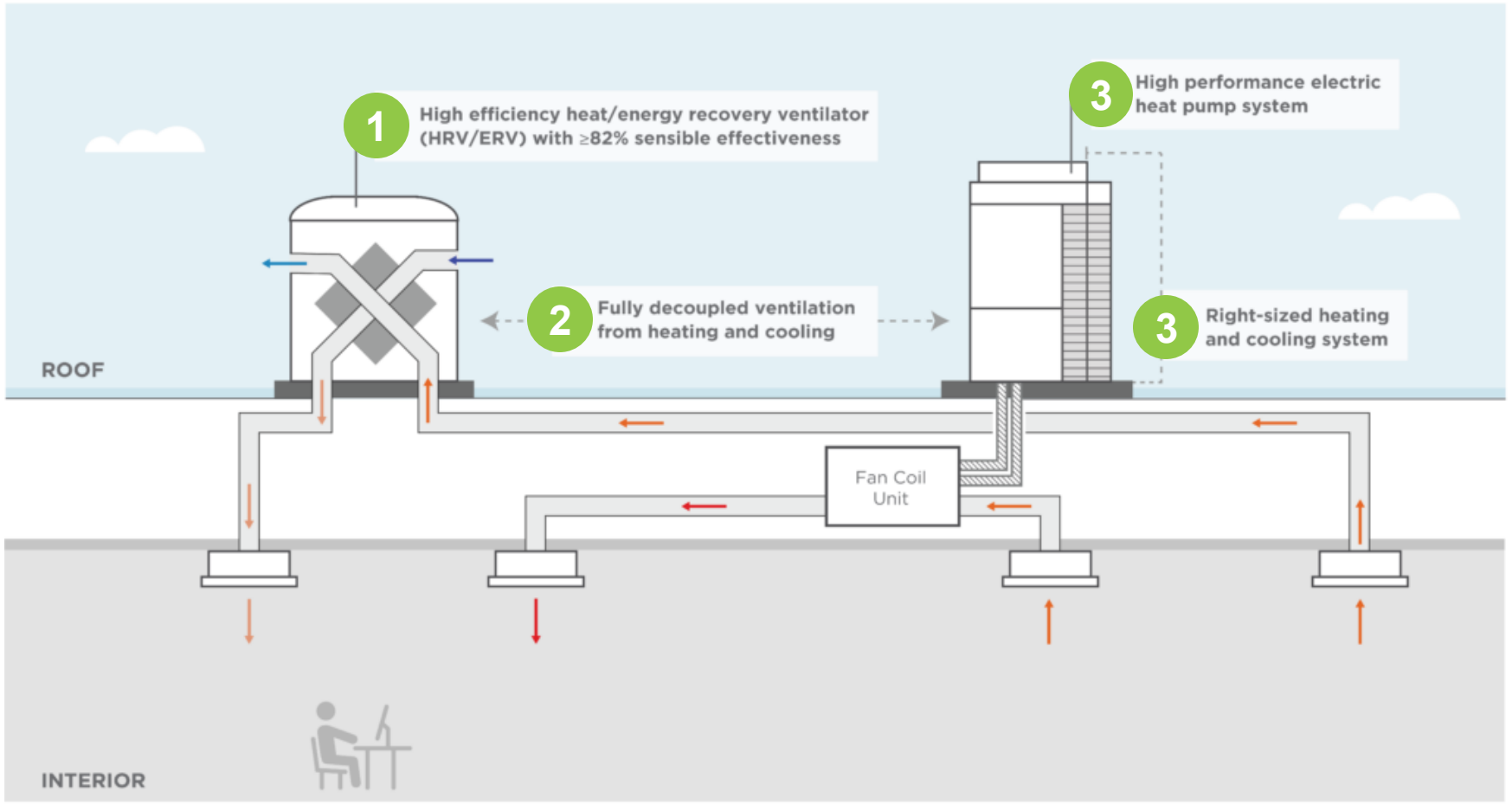


Impact

Commercial energy codes in each Northwest state will require the AP DOAS approach or equivalent efficiency

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Original AP DOAS (electric) system



Technology:

1. DOAS w/ high eff. E/HRV
2. Fully decoupled ventilation
3. Right-sized high-performance heat pump (typically VRF)*

Targeted Project Types:

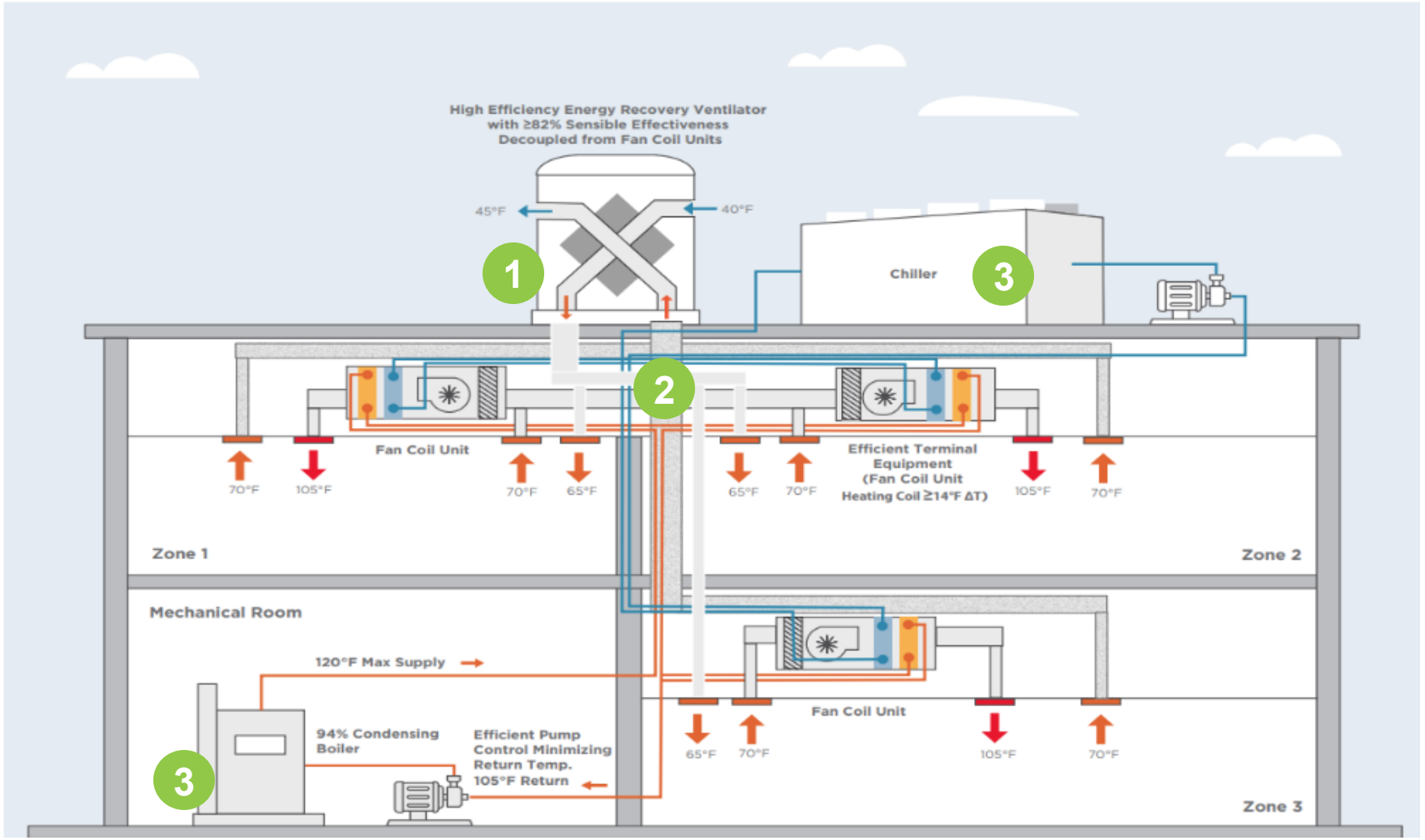
- New Construction/Retrofit
- Small/Medium Commercial
- Schools, Office, Retail, Government

Electric Savings Potential:

- 48% reduction in whole-building EUI
- 69% reduction in total HVAC EUI

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AP DOAS (gas) system



Technology:

1. DOAS w/ high eff. E/HRV
2. Decoupled ventilation
3. Properly-designed condensing gas boiler + electric chiller

Targeted Project Types:

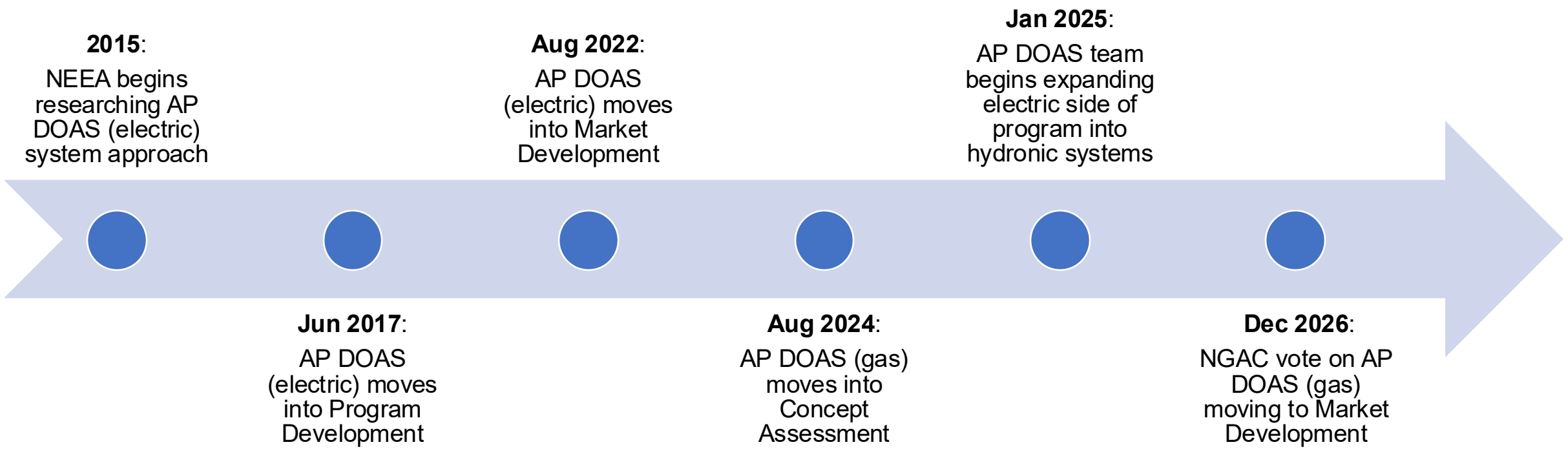
- New Construction
- Secondary Schools, Large Office

Savings Potential:

- 69% reduction in gas HVAC usage
- 39% reduction in total HVAC EUI

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Brief Review of Opportunity



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AP DOAS Learning and Resource Development

1 Technical Resources

- Design best practices
- HVAC selection tool
- Energy modeling guide
- Code analysis

2 Educational Resources

- Hydronic case studies
- E/HRV maintenance training
- IAQ training
- Cost analysis / system selection tool

3 Technical Research

- Latent load evaluation
- Field evaluations
- COVID-19 risk analysis
- Non-energy benefits research
- Performance rating lab testing

4 Market Research

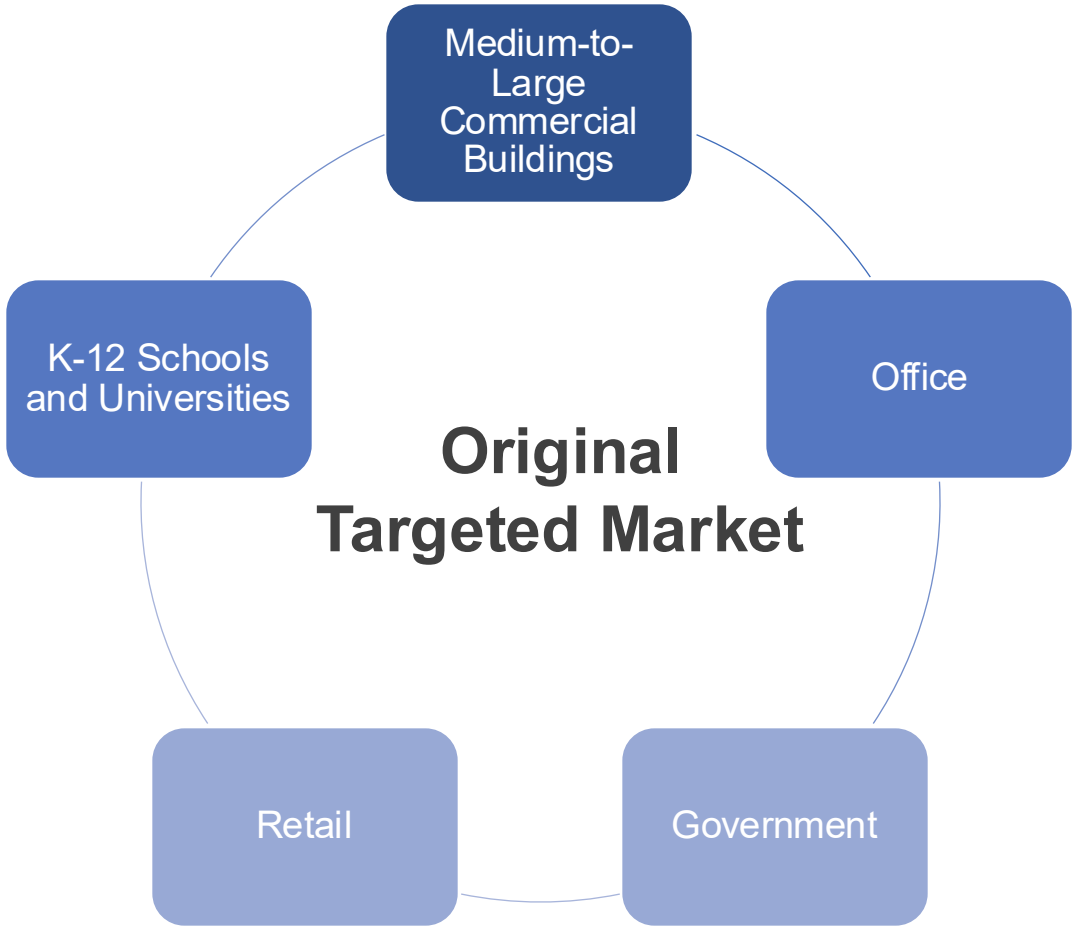
- E/HRV maintenance
- Market progress evaluation
- Specifier research

5 Established Industry Relationships

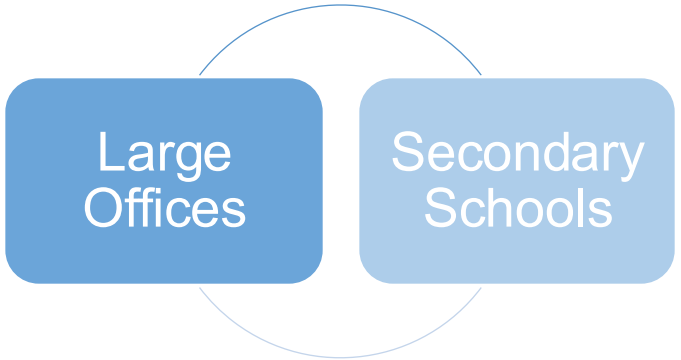
- Manufacturers
- Manufacturer reps
- Codes & standards committees
- Regional energy efficiency organizations
- Architects
- Engineers
- ESCOs

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Market Size



Updated Targeted Market



20-yr co-created savings = 100,000-1,000,000 therms

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Washington Code Minimum



Schools using AP DOAS (gas) **expected to meet** WSEC via "Fossil Fuel Compliance Pathway"

Other commercial buildings would require other credits in addition to using AP DOAS (gas) **in order to meet** WSEC via "Fossil Fuel Compliance Pathway"

While AP DOAS (gas) will be a viable HVAC system in many WA commercial buildings, the program savings analysis assumes **no above-code energy savings**

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Additional Benefits to Consider

Leveraged Investment

- Prior regional investment in AP DOAS (electric) ≈ $8M
- Gas funding co-share = 10% program share ($116,500 in 2027)

Non-Energy Benefits

- IAQ benefits bring added value to customers that are not well-quantified
- General zonal control and comfort provides additional benefits

Market Impact

- Gas expansion allows program to focus on commercial building benefits without unnatural fuel distinction
- Helps accelerate overall market transformation

Groundwork for Future Opportunities

- AP DOAS (gas) sets gold standard for commercial HVAC design & performance
- Complements AP RTU program and lays groundwork for future hydronic applications

Code Support

- AP DOAS (gas) energy performance is vetted and supports a gas solution that complies with WSEC
- Provides insurance that gas-heated buildings in WA will actually realize the intended code savings

"Future Proof" Design

- Offers a "no regrets" gas HVAC option for commercial building owners concerned with increasing EUI standards for new and existing buildings

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Ask of NGAC Members

- Review the Program Advancement milestone proposal
- Socialize with others in your organization as needed
- Schedule a time with NEEA staff to discuss between **Oct 29 - Nov 18.**

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Thank You!

Dave Hammond

Manger, Program Management

dhammond@neea.org

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PORTFOLIO REPORT HIGHLIGHTS

- *Q2/Q3 2026 Recap*



pg. 5-16

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Natural Gas Market Transformation Portfolio - Current

Status as of Oct 2026

Efficient Rooftop Units (expanded to fuel-neutral)

Advanced Performance DOAS (electric program expanded to fuel-neutral)

LLLC with paired HVAC Controls (electric program expansion as fuel-neutral opportunity with HVAC)

Dual-fuel Residential HVAC

Advanced Commercial Water Heating

Efficient Rooftop Units (RTU)



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

Program Highlights

Advanced Performance Rooftop Units (AP RTUs)

jjones@neea.org

- Consortium for Energy Efficiency (CEE) has proposed including low-leakage dampers in all of their Unitized HVAC Efficiency Tiers.
- **Collaboration Opportunity:** Still seeking field study sites to validate the modeling for gas-fired (gas or hybrid heating) RTUs.
  - *Heads Up (tracking to Threshold Goal): Manufacturer Engagement: On track to add 2 new RTU lines to the Compliant Product List; Manufacturer Rep Recruitment: Project Order in place with one rep, and three reps are in negotiations on agreements; Market Actor Awareness Engagements: Four new marketing assets have been developed.

Initiative Lifecycle



***Q4 Agenda Packet* pg. 7**
***Q2 Market Progress on 2026 Goals* pg. 21 (9/9)**

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Program Highlights

Advanced Commercial Water Heating (ACWH)
mmejia@neea.org

- Dual-fuel field test achieved HPWH COPs of 3.0-3.4, an average system COP of ~1.4 (double the baseline), and reduced hot water delivery costs by ~24%. GHP field test installation completed.
- Expanded Ecosizer is live. It allows for sizing of dual-fuel systems (supplemental heating). GHP sizing tool beta to be finalized in Q4.
- **Collaboration Opportunity:** GHP field test sites. Hotel/Restaurant with >2,000 GPD.
- ***Heads Up :** Market Engagement. Draft plan received. Facilitation to begin in Q4.*

Initiative Lifecycle



***Q4 Agenda Packet* pg. 9**
***Q2 Market Progress on 2026 Goals* pg. 20 (9/9)**

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Program Highlights

Dual-Fuel Residential HVAC (DFRes HVAC)

dsunada@neea.org

- Market Characterization Study ongoing. Final report expected Q4 2026
- Clark PUD/NWN demonstration data collection complete. Final report expected in Q4 2026
- **Collaboration Opportunity:** Seeking sites and HVAC contractor partners for dual-fuel switchover temperature field study
  - ***Heads Up** (Market Progress Report): Tracking to threshold targets. Target market, baseline, and savings validations will be completed by independent contractor in Q2 2027. Field Study #2 data collection will carry-over 2026-2027 heating season

Initiative Lifecycle

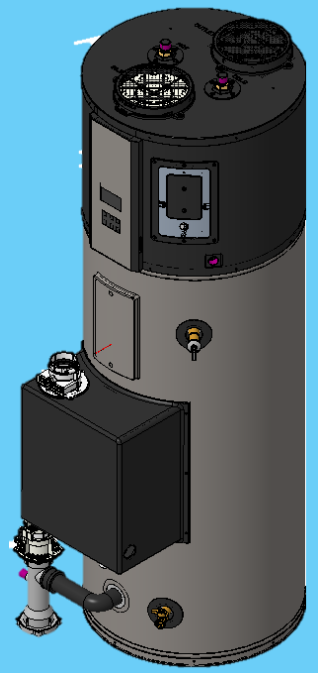


***Q4 Agenda Packet* pg. 11**

***Q2 Market Progress on 2026 Goals* pg. 16 (9/9)**

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Navien Residential Dual-Fuel Water Heater



Navien NXW700

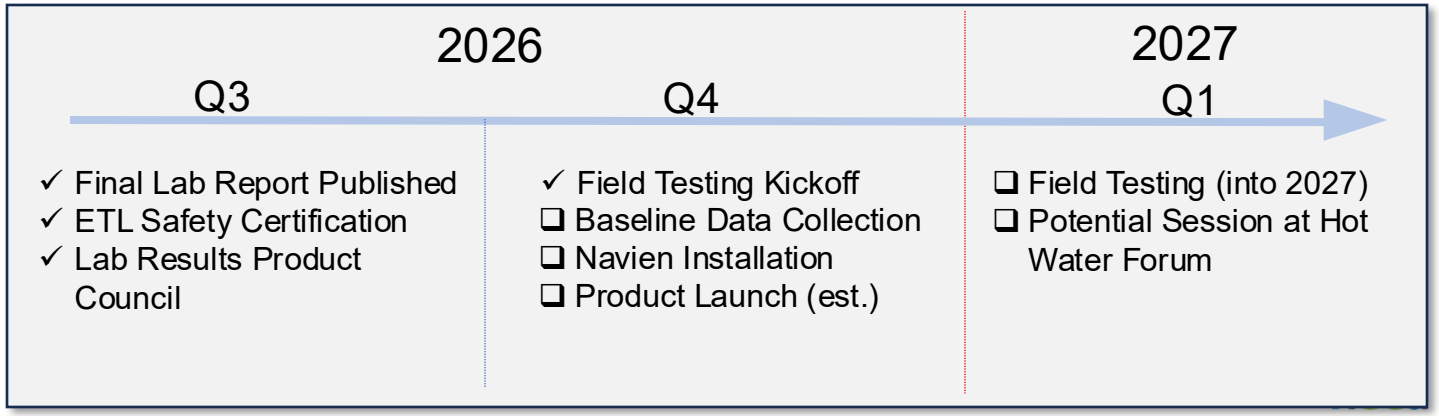
- 50-gal dual fuel water heater (drop-in)
- 120V plug-in electric heat pump
- 40k Btu and 60k Btu
- Condensing gas burner
- Multiple out-of-the-box operating modes

Nov 12, 2025 Product Council Recording and slides:
Navien Dual-Fuel Residential Heat Pump Water Heater

***Portfolio Highlights* pg. 13**

Scanning Highlights

- GTI Lab Study Final Report published to neea.org
- Report modeled each of the following by *city*, *operating mode* and *install location*
  - Efficiency
  - Level of comfort
  - Gas and electricity usage
  - Energy cost of operation
- Results presented at Sept. 22 Product Council
- Kicked off *field* study with Energy 350 and Larson Energy Research
- Submitted abstract to present interim findings at Hot Water Forum



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North American Gas Heat Pump Collaborative

- Research Projects
  - North American Gas Heat Pump Market Characterization: completed
  - GHP Savings Assessment: completed
- Manufacturer Outreach
  - Engaging with Beckett Commercial Solutions on SMTI acquisition
  - Finalizing agreements with Natural Gas Innovation Fund (NGIF) to support Vicot in North America
- CEE Industry Partners Meeting GHP Workshop

***Portfolio Highlights* pg. 13-14**

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Codes, Standards, New Construction Highlights

Q2 / Q3 2026

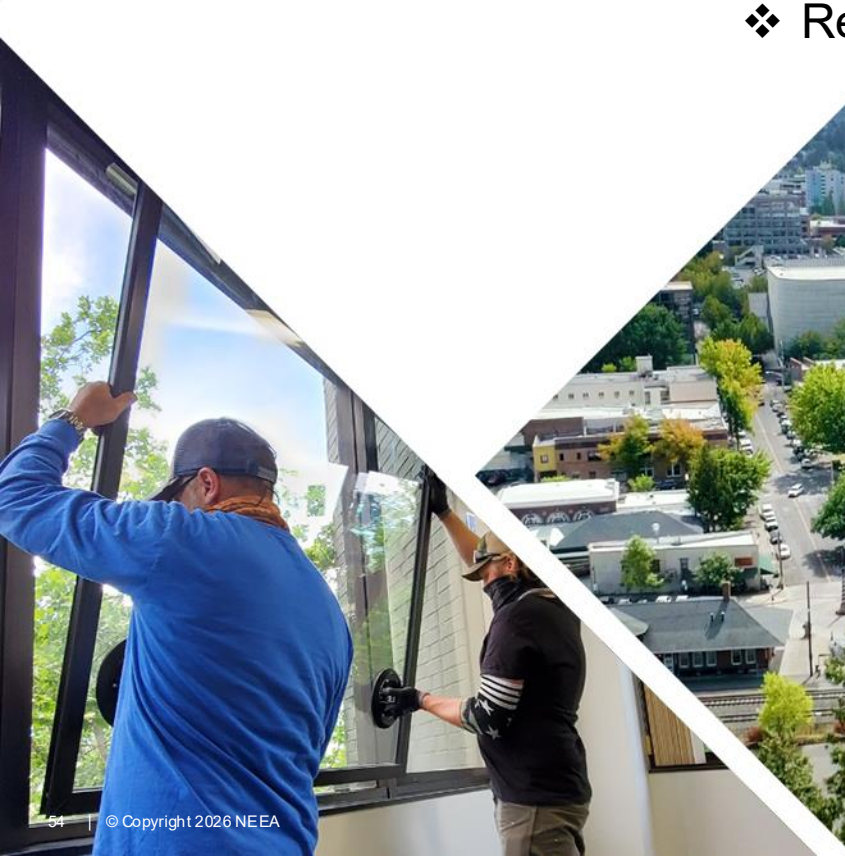
- Codes
  - **Washington** code update expected late 2026
  - **Oregon** started commercial code cycle – 90.1-2025
  - **Idaho** – Likely to include code in statute with approval in early 2027
  - **Montana** – Adopted modified 2024 IECC for residential and commercial code. Effective December 2026
  - **2027 IECC** – On track for 2027, starting 2030
- National Standards
  - Residential gas water heaters and commercial furnaces challenged at the Supreme court and by manufacturers' requests for standards delay.
- New Construction
  - Performance Path V4 completed and in effect.

***Portfolio Highlights* pg. 15**

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Check-in: New Report Format

- *NEW* Coordination Opportunities Summary (pg 6)
- Still working for you?
- Anything you like / don't like?
- Anything missing or unclear?
- Reminder: 2027+ = Portfolio Report in Q2 & Q4 only









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Agenda

All Times Pacific

9:30-9:50	**Welcome, Agenda Packet Review, Introductions**
9:50-10:10	**Committee Round Robin**
10:10-10:30	**Housekeeping, Looking Ahead**
10 min	**BREAK**
10:40-11:10	**[Vote Prep] Program Expansion: Gas Advanced Performance DOAS**
11:10-11:45	**Portfolio Report Highlights**
11:45-11:50	**Public comment, wrap up and adjourn**



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Action Items / Recap / Final Qs?

- NEEA staff:
  - xx
- NGAC Members:
  - Any interest in an LLLC+HVAC pilot, if you're not already doing that? (see info memo, pg 17)

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Meeting Feedback

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



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Public Comments?

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Thank you NGAC!

Next Meeting: Dec 9, 1-2pm (webinar)

