Regional Portfolio Advisory Committee

Q4 2026 Informational Packet (emailed Tuesday, Oct 27)
Nov 2 Meeting Canceled

MEETING PACKET APPROACH

This packet continues the "tiered" approach:

- Tier-1 memos for active agenda items (none this time, no meeting)
- Tier-2 memos for informational updates on items not currently requiring agenda time.
- Tier-3 materials provided as additional detail for those interested, accessible via links in the Tier 1 and Tier-2 memos. All other Tier 3 materials are listed below.

PACKET ITEMS & INFORMATIONAL UPDATES (Tier 2)

- Page 2: Memo: Housekeeping Items
- Page 3: Memo: Heat Pump Water Heater Proposed 2027 Marketing Campaign
- Page 4: Memo: Program expansion updates
- Page 5: Memo: Heat Pump Water Heater Work Group Update
- Page 6: Memo: Q2 / Q3 Electric Committee Updates
- Page 8: Market Transformation Portfolio Diagram
- Page 9: Q3 2026 Market Progress Report (gas + electric programs' annual goals progress)

ADDITIONAL REFERENCE:

- **Committee Meeting Materials & Charters:**

  Please review the committee updates on pg.6 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/

Proposed 2027 RPAC Meeting Dates

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

Memorandum – *Informational (Tier 2)*

October 26, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Alisyn Maggiora, Sr. Stakeholder Relations Manager

SUBJECT: Q4 Housekeeping Items

Our Ask of You:

Please review the key reminders and requests below, take action where needed, and/or contact me as needed.

Reminders & FYIs:

1) ***CLOSES TODAY* 2026 Stakeholder Satisfaction Survey**
   - LINK: 2026 NEEA Stakeholder Survey
   - From September 28 through October 27, NEEA invites funding stakeholders who participate in Board, committee, workgroup, and other engagement activities to share feedback through the Stakeholder Survey.
   - The survey is conducted approximately every 2 years and helps NEEA better understand stakeholder experiences, identify what's working well, and uncover opportunities to strengthen collaboration and processes.

2) ***DUE MON NOV 2* Feedback on Draft 2027 Operations Plan**
   - Send feedback via email to me by COB Monday Nov 2.
   - If you missed the 2-hr webinar covering the highlights, you can view it here.

3) ***REGISTER BY NOV 20* Leadership in Energy Efficiency Awards Event (Dec 4)**
   - Register to attend here (in-person or virtual); you can also view details about the process, nomination categories, last year's awards ceremony on the LEEA landing page.
   - Nominations window is now closed.
   - Event is 9-11 a.m. (Pacific) on Friday December 4

4) **RECAP: NEEA / Market Transformation + Codes & Standards 101 webinar**
   - Recording of the Oct 7 session is now available here, feel free to share.
   - The next session is expected at the end of March. Contact Alisyn Maggiora (amaggiora@neea.org) to be added.
   - Future special topics will include: Regional Studies & Infrastructure, Market Research/Evaluation, Data Acquisition, MT Barrier Removal, Special Projects

Please contact Alisyn Maggiora (amaggiora@neea.org) if you have questions about the items in this memo.

Memorandum – *Informational (Tier 2)*

October 26, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Britt Cutsforth Dawkins, Senior Manager, Marketing Strategy

SUBJECT: Proposed 2027 HPWH Consumer Campaign

Our Ask of You:

Please review the memo and bring any questions to the Q1 RPAC meeting on March 3, or contact me at the email below.

Brief Overview:

NEEA is planning a 2027 marketing campaign focused on educating Northwest consumers about the benefits of replacing their existing electric water heater *before it fails* with a HPWH. Since this is a downstream marketing effort, NEEA staff want to ensure funders are aware of the key campaign messaging.

Prior to the Q1 2027 RPAC meeting, NEEA staff will share the campaign's proposed high-level messaging and general creative direction with RPAC members and RPAC+ to provide visibility into how the campaign will speak to Northwest consumers. While proactive replacement is the overall theme of the new campaign, the proposed messaging remains centered on the value proposition of HPWHs and informed by insights from the alliance's previous regional HPWH consumer campaigns.

Following the Q1 2027 RPAC meeting, NEEA and its marketing contractor(s) will produce the campaign creative, including :15 and :30 video spots. This creative will be finalized and shared with RPAC members and their communications / marketing folks ("RPAC+") in mid-April.

Funders will have time to review prior to the elections that will be held during the Q2 2027 RPAC meeting. The campaign is anticipated to launch in late Q2 2027.

Please contact Britt Cutsforth Dawkins (bdawkins@neea.org) if you have questions about the proposed campaign.

Memorandum – *Informational item (Tier 2)*

October 26, 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 contact NEEA staff listed below with any questions, feedback, or concerns.

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 electric Advanced Performance DOAS program to include DOAS units paired with gas heating systems. This change will help accelerate the overall market transformation effort by engaging building owners and designers regardless of their fuel choice and eliminates the unnatural distinction of fuel types, making the system less of a niche approach.

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.

In preparing for the Program Advancement, NEEA staff completed the assessment of market size, incremental costs, savings estimates and market baseline for gas systems. The outcomes of the 3rd party review of the assumptions and baseline report will be reviewed by the Cost Effectiveness Evaluation Committee (CEAC) in their October 28th meeting, including the co-funding approach between the electric and gas portfolios. From the analysis, and using NEEA's policy *Electric and Natural Gas Funding Sources: Allocation Methods for Core-Funded Activities and Programs* the funding split will be 90/10, electric and gas respectively. This co-funding share is reflected in the 2027 Operations Plan.

In Q1 2027, NEEA staff will share with the RPAC the outcomes of the NGAC review and milestone vote, planned for December 9th.

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)*

October 26, 2026

TO: Regional Portfolio Advisory Committee (RPAC)

FROM: Alex Merrill, Program Manager, Heat Pump Water Heaters

SUBJECT: 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.

The work group began with workshopping of priority areas in Q1 and held more focused conversations around prioritized solutions in Q2. Q3 meetings focused on discussions of two prioritized implementation strategies: installer specialists and negotiated prices. Following discussion, strategy refinement, and work group member feedback, the facilitators met individually with participants to discuss individual program interest and implementation areas. These conversations and the refined strategy profiles informed a draft regional strategy document based on the discussions to date.

The work group will hold its final meeting October 29 to review and refine the draft regional strategy document noted above s, affirm opportunities for ongoing collaboration, and identify future learning priorities across strategy goals.

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*

October 26, 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 (Q3 / Q4 2026)

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 Q3, September 30, RETAC meeting included presentations from Keshmira Engineer with the Bonneville Power Administration and Robert Bogataj with Seattle City Light. In addition, attendees of the ACEEE Summer Study for buildings shared observations and technologies of interest.

Keshmira Engineer reviewed priority research areas for BPA including dairy heat recovery and commercial water heating. Robert Bogataj provided an update about SCL's priorities including demand response, commercial incentives, codes and electrification, heat pump for residential HVAC, and lighting regulation. Topics shared about the ACEEE Summer Study conference included data centers, heat pump policies, commercial buildings and end use load flexibility.

The committee members shared details of their own organizations and research during a round robin discussion.

The Q3 meeting is scheduled for December 8, 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):

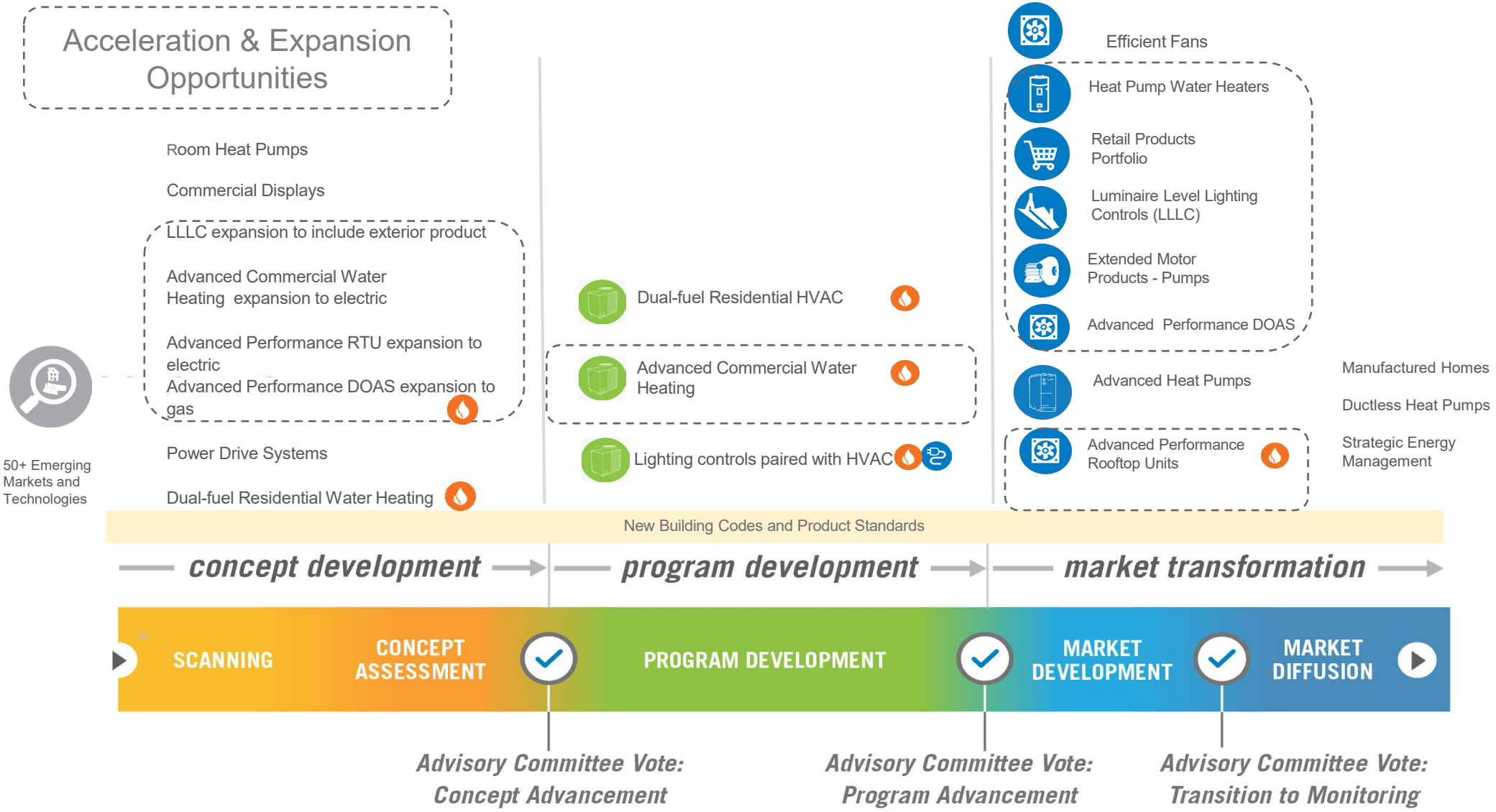
At the Q3 2026 Cost-Effectiveness and Evaluation Advisory Committee Meeting on August 26, NEEA staff oriented members to NEEA's major energy-use studies and how their data support market sizing, modeling, program strategy, and savings forecasts. Staff also reviewed findings from Heat Pump Water Heater Market Progress Evaluation Report #8 and provided a brief market research and evaluation update. The committee reviewed updated key inputs and assumptions, advised on the third-party review of the Efficient Fans naturally occurring baseline, and gave 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 (Q4 2026) is scheduled for October 28, 2026, in a hybrid format at NEEA's Portland office and on Microsoft Teams. Topics will include an overview of NEEA's annual reporting process and the committee's role in it, a reminder about the annual local programs survey, and a review of the natural market baseline and key assumptions for the Gas High-Efficiency DOAS program advancement. The meeting will also include a market research and evaluation update, a review of updates to the heat pump water heater baseline, and key findings from the Manufactured Homes Market Diffusion Evaluation.

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 Transformation Portfolio by Lifecycle Phase (Oct 2026)



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

2026 Q3 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
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.

Consumer Products Product Group

2026 Operations Plan Milestones	Target	Threshold	Status as of 10/26/2026	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	Initial results from the first six refrigerator tests and results on a possible method to reduce refrigerator test burden will be available in Q4. 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 is beginning to implement the TV action plan which includes gaining more sponsor support for television incentives. The team has presented the TV savings opportunity to one potential additional sponsor. The addition of on-mode power requirements to the TV voluntary agreement was officially announced in September. This will deliver anticipated TV program savings.
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 program team is working with one national retailer to support an increase in heat pump water heater sales in 2027. In partnership with NEEA's HPWH team, NEEA has provided content for the retailer's website and AI assistant. The NEEA team has recently been introduced to the retailer's sustainability team which may facilitate further efforts. The Pro Channel analysis has been completed, and findings indicated this channel's sales volume in appliances is not currently robust enough to warrant new interventions to target this segment at this time. The RPP team may consider adding one distributor in future years depending on the program's product category emphasis.

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 10/26/2026**	**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.	**On target**	The program continued convening the HPWH work group, focusing on continued in-depth discussions of priority strategies and related implementation actions. The work group will hold another meeting in Q4 to finalize the work group's strategy document and affirm next steps. The program collaborated with General Pacific to host a training for pre-apprenticeship students attending Gresham High School in Oregon, focusing on informing students who will soon be entering the workforce. The program also collaborated with Ferguson, Hollabaugh Brothers, and related utility programs to provide a series of trainings at Ferguson branches in the region. The training series reached 60 participants and covered HPWH technology, customer solutions, local utility programs, and Ferguson internal resources. The program has met the target for 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 Q3, the program made substantial progress in collaboration with two additional extra-regional partners. NEEA's session was accepted for the Southeast Energy Forum, where the program will collaborate with Southeast Energy Efficiency Alliance staff and manufacturers to lead an interactive session focused on increasing heat pump water heater adoption in the Southeast in preparation for the 2029 consumer water heating standard. Additionally, in response to Lowe's request, the program provided recommendations to improve the Lowe's water heater buying guide on Lowes.com, with a focus on clarifying the value of heat pump water heaters and increasing their visibility to customers. The recommendations are currently under review by the Lowe's team. The program has met the target for this goal.

Residential

Initiative Name	Manager	Fuel Type	Initiative Goal

Water Heating Product					
	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 10/26/2026**	**Comment**
	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 Q3, the program announced Midea as the Hot Water Innovation Prize winner at the American Council for an Energy-Efficient Economy (ACEEE) Summer Study. The program also led an informal session to build excitement for the winning product and help Midea clarify the business opportunity, drawing utilities, implementers, and advocates from across the country. The program has secured commitments from three entities representing the Northeast, the Northwest and California to support demonstration projects. The program has met the target for 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 10/26/2026**	**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.	**On target**	NEEA continues to refine and implement 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 embedded commissioning certification testing with NEEA. Six additional manufacturers are co-developing with NEEA a new Embedded Commissioning Certification requirement with a final draft developed in Q3. NEEA's work with Regional Technical Forum and other regional energy efficiency stakeholders continues to pursue alignment on a strategy to minimize use of electric resistance heat through utility program measures.
	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.	**On target**	NEEA is working with Driftless Energy to conduct the heat pump field study on current practices for heat pump installations. Participant recruitment will begin by the end of October. NEEA completed two field demonstrations of embedded commissioning capabilities in the Daikin and Trane systems. NEEA drafted a third extra regional embedded commissioning field case study. Two additional field demonstrations are in development for completion in November and December positioning the program well to meet the goal for the year.

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 10/26/2026**	**Comment**
	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**	The Advanced Heat Pump Program finalized its Message Map at the end of Q3, with plans to revisit and update existing program marketing materials in Q4 to ensure the value proposition and message of program improvements are clearly communicated to each audience. NEEA also provided a series of talking points to the Consortium for Energy Efficiency that were used at the CEE Industry Partner's meeting during the presentation of the CEE Integrated Home Competition awards to recognize Daikin and Trane for their products' embedded commissioning capabilities. NEEA is working with Trane to cross promote this award and highlight embedded commissioning in the market. Lastly, the 'Connected Commissioning' improvement was renamed to 'Embedded Commissioning' after learning there is a trademark for 'Connected Commissioning'. The name has been changed across all marketing materials, the BetterbuiltNW website, and program presentation materials.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal

HVAC Product Group

Advanced Performance DOAS	Dave Hammond	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 10/26/2026**	**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 (AP) DOAS program has completed over 10 awareness or educational efforts to supply chain audiences in 2026 through a podcast, presentations, tabling events and webinars. Additional events are planned through EOY, including multiple building tours and an educational publication.
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 AP DOAS program team is finalizing multiple hydronic resources and will be ready for publication before EOY. This includes an updated system design fact sheet, overall program design guideline document, hydronic case study, podcast describing a hydronic advanced performance DOAS system design and an article developed by a mechanical engineer describing the benefits of AP DOAS.
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 previously planned American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE) proposal was intentionally delayed so the program team can further prepare for the vote. This includes performing energy modeling of the advanced performance DOAS system in humid climates to demonstrate applicability beyond the Northwest and building support within the Air Conditioning, Heating and Refrigeration Institute (AHRI), as this has been identified as a critical step prior to gaining approval from ASHRAE on new HVAC performance metrics.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal

HVAC Product Group

Advance Performance 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 10/26/2026**	**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."	Heads up	The program team is currently engaging with Carrier, Trane, and York (Bosch) about adding advanced performance 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.). The program is expecting to add two new RTU lines to the Compliant Product List by the end of the year, meeting the threshold goal.
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. This same rep is adding a second qualified manufacturer soon and will be able to submit sales data for that manufacturer also. The team is negotiating with three 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 advanced performance RTUs, resulting in increased traffic to the RTU page on BetterBricks. The program is not on pace to meet the target goal of delivering four engagements by end of Q3 but has developed four new marketing assets to meet the threshold goal.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal
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.**

HVAC Product Group

2026 Operations Plan Milestones	Target	Threshold	Status as of 10/26/2026	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	Dual-fuel residential HVAC technology demonstration project was completed and report will be issued in Q4 2026. A second field research study was initiated and participant recruitment is underway. Data will be collected during the 2026-2027 heating season and a report will be issued in 2027.
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	Market Characterization study is underway and final report will be issued 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.	Heads up	Preliminary logic model will be developed in Q4 2026 and updated in early 2027 with Market Characterization final report findings.
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	Refinement of target market and baseline assumptions will be completed by Q4 2026. Independent validation of gas savings will be completed in 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 10/26/2026**	**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	Partnered with Solus Lighting & Controls to support its Fall Folly event in Portland, which brought together almost 200 specifiers. Coordinated delivery of LLLC educational content and display of an LLLC demonstration board, and provided support and technical assistance to help introduce attendees to LLLC applications and benefits. Additional events are planned for Q4, which sets the program up to meet the 2026 target for this goal.
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	In Q3, the program reached more than 75 attendees across two events. Collaborated with Lighting Representatives to promote an American Institute of Architects (AIA) Montana event. Leveraged a Lutron demo board at the booth to provide hands-on LLLC engagement. First delivery of new NXT Level Best Practices content alongside a Manufacturer Representative and another expert. Remaining events scheduled through Q4 will meet 2026 target.
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	In Q3, NEEA staff contributed to a proposal submitted to ASHRAE for additional energy credits for small occupancy zones and larger daylight zones. The vote will be taken at the January ASHRAE meeting. The Illuminating Engineering Society (IES) just closed public review on revisions to their Recommended Practices 3 & 4 (Libraries and schools), which NEEA staff contributed to, to now include adding documentation of LLLC. The published version is expected by the end of the year. These Q3, along with the Q2-reported developments, position the program well to meet its 2026 goal target.

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 10/26/2026**	**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 Q3, and smart circulators reached 46% market share in Q3.
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**	In Q3, the XMP field team tabled at five events. Also in Q3, the program's contract engineers delivered seven lunch-and-learn events with pump specifying firms in partnership with XMP participants. The program is on pace to exceed the goal of 15+ high-impact awareness building activities in 2026.
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.	**Heads up**	The XMP program has 10 active participants as of Q3, with a contract offer in progress for an 11th prospective rep firm participant. The program also has one manufacturer-direct agreement executed, and a second manufacturer-direct contract on-track to be executed in Q4.

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 10/26/2026**	**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**	Completed critical program development activities, finalized the Market Transformation theory and logic model, and gathered additional market data, culminating in a successful vote with the Regional Portfolio Advisory Committee (RPAC) to advance the program to Market Development in Q3 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**	In 2026, three marketing resources have been developed, informed by market research: an Industry Voices interview with AMCA's Michael Ivanovich, an FEI code compliance article, and a one-page resource guide highlighting program benefits.
"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**	In 2026, the program team finalized the renewed AMCA partnership agreement and completed three strategic initiatives, including: education modules, FEI specification research and discussion, and engagement with AMCA's FEI subcommittee to inform program strategy, expand FEI visibility, and strengthen industry alignment and manufacturer engagement.

Commercial and Industrial

Initiative Name	Manager	Fuel Type	Initiative Goal
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.**

Water Heating Group

2026 Operations Plan Milestones	Target	Threshold	Status as of 10/26/2026	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	On target	Program is on target to share the dual-fuel and gas heat pump field tests' interim report findings with funders by the end of the year. The program has also scoped a lab test to validate gas heat pumps in hotel applications, with work expected to begin in Q4.
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 and will be published to neea.org in Q4. The team synthesis session is planned for Q4. Findings are being integrated into the program's Market Transformation theory and Logic Model, as well as overall program strategy. The program has also kicked off the Commercial Dual Fuel & Electric Water Heating Market Characterization Study.
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	Engagement plans were finalized by the end of Q3, meeting the threshold for this goal. Interviews will begin before year-end. This work will support strategic outreach to priority manufacturers and other key stakeholders, such as distributors, to strengthen relationships and identify opportunities and market levers that NEEA can use to support the supply chain and advance adoption of advanced commercial water heating systems.

Infrastructure

Initiative Name	Manager	Fuel Type	Initiative Goal
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.**

Infrastructure Programs

2026 Operations Plan Milestones	Target	Threshold	Status as of 10/26/2026	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**	The BetterBricks website saw a 97.4% increase in traffic compared to Q2 2025—the result of the commercial HVAC programs launching an educational campaign and interactive quiz in Q2-3 and a notable increase in events the second half of the year. The team expects web traffic to dip in Q4 as campaigns ramp down, while overall web traffic should remain up year-over-year.
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 eight industry events in Q3, including a sponsorship and HVAC presentation at the AirReps Expo in Washington, and an exhibit booth and panel presentation covering efficient lighting and HVAC at the AIA Montana Fall Conference. An additional 15 events are currently being planned for in Q4. Three new resources were added to betterbricks.com in Q3, including an Industry Voices article featuring an efficient fans expert from the Advocacy and Education with the Air Movement and Control Association International (AMCA) discussing fan efficiency and the value of the Fan Energy Index.