

Beyond Boundaries: A Collaborative Blueprint for Clean Buildings in the Puget Sound

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ABSTRACT

Using the trailblazing Washington Clean Buildings Performance Standard and the City of Seattle's Building Emissions Performance Standard laws, the State of Washington and the City of Seattle are fighting for a better tomorrow by creating a less carbon-intensive and more energy-efficient built environment.

Several utilities and municipalities in the Puget Sound region are leading the way. Puget Sound Energy, Snohomish PUD, and Seattle City Light, as well as the City of Seattle's Office of Sustainability & Environment are helping their customers and residents to address the laws, **and they are doing this work together.**

From hosting shared open houses, to recruiting together and co-hosting workshops, to participating in and co-funding each other's energy scans and one-on-one coaching, the program administrators are working together for the greater good of the region and the community to meet the challenge of the day. The programs meet regularly to share ideas, discuss barriers, and review lessons learned. When a concern arises in one program, another works with them to overcome that issue.

This effort has been so successful that more than 270 organizations have gone through these shared programs, many having achieved compliance for multiple buildings. Since 2021, the region has saved more than 15 million kWh and more than 400,000 therms and has reduced the region's carbon emissions by well over 431,819 kgCO₂e.

This paper presents the background, specific approaches, and innovations from the region's collaborative energy management efforts and provides guidance that other regions can leverage.

Introduction

Buildings are the second-largest source of greenhouse gas (GHG) emissions in Washington State. Behind only transportation, buildings accounted for 27% of the state's GHG emissions in 2015 (WA Commerce 2025c). In 2021, the Washington Department of Ecology attributed 24.6% of the state's GHG emissions to fossil fuel-based heating for buildings, as well as industrial energy use (WSDE 2024). Since 2020, the state has implemented numerous policies to combat GHG emissions, including clean building codes and a groundbreaking clean building performance standard (WSDE 2024). Figure 1 summarizes these policies and their effects on emissions.

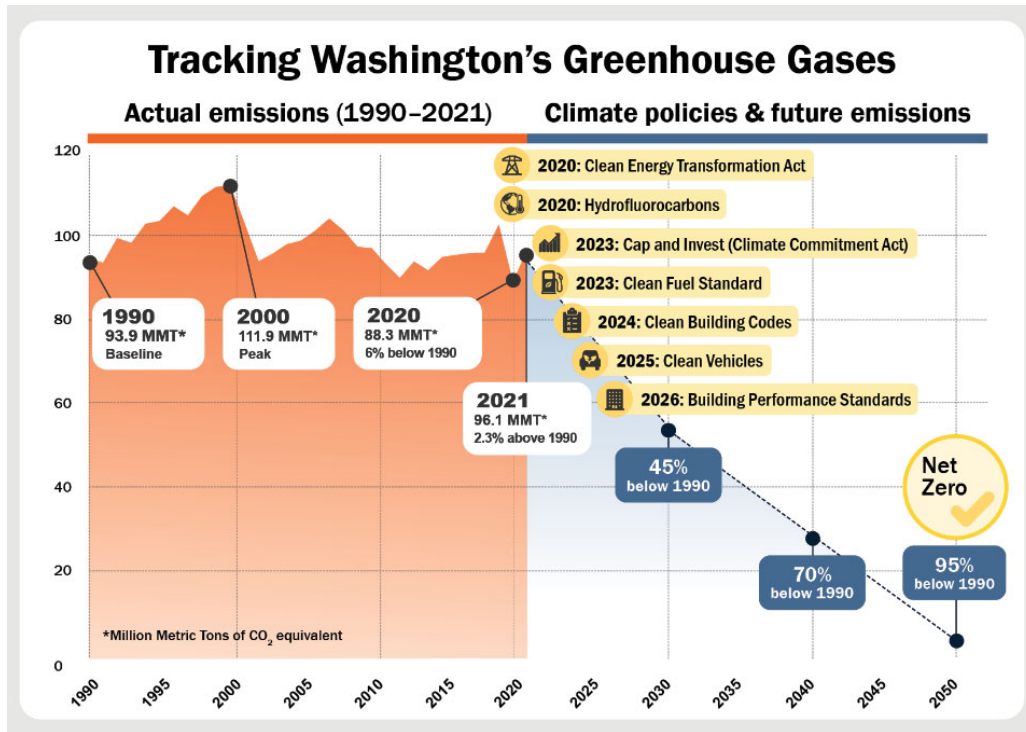


Figure 1. Washington State greenhouse house emissions and relevant policies, 1950-2050.
Source: WSDE 2024.

These policies not only drive emissions reductions but also create a complex implementation environment that requires carefully coordinated support across utilities and jurisdictions

Background

Puget Sound Regional Landscape

The Puget Sound region has a population of approximately 4.5 million, which accounts for more than half of Washington State's total population and uses most of the state's energy (PSRC 2025). The region has multiple organizations, utilities, and municipalities helping building owners comply with the Washington Clean Buildings Performance Standard (WA CBPS) and the City of Seattle's Building Emissions Performance Standard (Seattle BEPS) laws, which has led to many overlapping programs. Although the various program administrators have collaborated in the past, there are also challenges as utilities and municipalities try to serve their overlapping customers without stepping on each other's toes. To set the stage, it can be helpful to look at the regional landscape using two dimensions: The overlay of utilities and municipalities in the Puget Sound region (see Figure 2) and the history of policy developments in the Puget Sound region, Washington State, and the Pacific Northwest

Puget Sound Region Program Administrator Collaborators

- Puget Sound Energy (PSE) was created by the 1997 merger of Puget Sound Power and Light and Washington Energy Company—two companies dating back as far as 1873 (PSE 2026b). PSE provides electric service to 1.24 million customers and gas service to 881,000 customers, making it the largest utility in the state (PSE 2026a). PSE’s gas service overlaps with other electric utilities in the Puget Sound region, as well as numerous public utility territories beyond the Puget Sound (Esri 2026).
- The City of Seattle’s Office of Sustainability & Environment (OSE) developed and administers compliance with Seattle BEPS. OSE’s mission is to ensure a clean and healthy environment for all Seattle residents, prioritizing those currently and historically harmed by racial, economic, and environmental injustice (City of Seattle 2026c).
- Seattle City Light (SCL) provides electrical power to 493,000 customers in the Seattle area and has the longest running energy conservation program in the country (SCL 2026). SCL territory extends beyond the City of Seattle into adjacent areas of the Puget Sound and overlaps with PSE’s gas service (Esri 2026).
- Snohomish County Public Utility District (PUD) provides electrical power to 380,000 customers on the northeastern side of the Puget Sound region. Established in 1936, the PUD has run energy efficiency programs for more than 30 years (PUD 2026). The PUD’s electric territory overlaps with some of PSE’s gas territory (Esri 2026).
- Tacoma Power provides electrical power to 186,000 customers on the southeastern side of the Puget Sound region (TPU 2026). Founded in 1884, public utility Tacoma Power received the first-ever Award for Excellence in Energy Efficiency from the Bonneville Power Administration (BPA) in 2011 (TPU 2012). Tacoma Power also has overlapping territory with PSE’s gas service territory (Esri 2026).

Figure 2 below shows the overlapping territory of the Puget Sound regional collaborators, which demonstrates the complexity of the region. It should be noted that in addition to the utilities and municipalities collaborating in the region, there are smaller utilities that also dot the landscape, thereby further complicating collaboration.

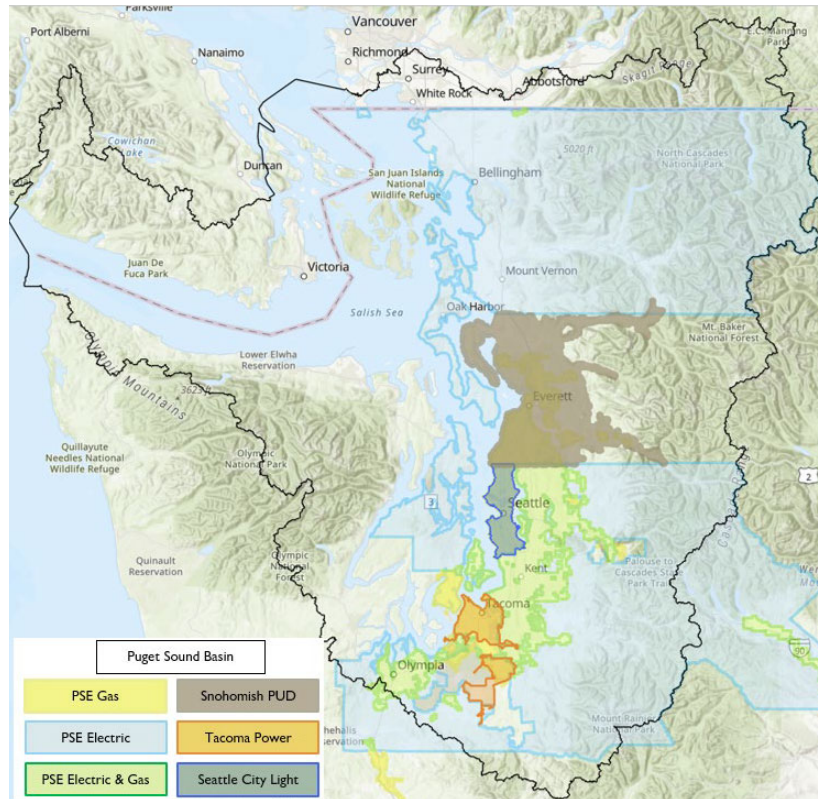


Figure 2. Overlapping utility territories in the Puget Sound region. *Source:* Esri 2026.

Historical Policy Developments in the Pacific Northwest

Although many relevant policies were enacted over the last few decades across the Pacific Northwest, three of them have been essential to shaping the current regulatory environment in the Puget Sound region. Their impacts have led to the innovations explored in this paper.

Northwest Power Act. 1980’s Pacific Northwest Electric Power and Conservation Act (Northwest Power Act) required Idaho, Montana, Oregon, and Washington to develop a regional power plan and fish and wildlife program. The Northwest Power Act places a discount on energy efficiency to support utilities prioritizing efficiency as a resource (NPCC 2026). This led to thriving energy efficiency programs across Washington and, at times, a crowded landscape of customer programs.

The Energy Independence Act. 2006’s Washington State Initiative measure number 937 (commonly referred to as “I-937”) established the Energy Independence Act (EIA), a renewable portfolio standard for large utilities that requires them to undertake all cost-effective energy conservation measures (NPCC 2026). During the ensuing years, this law led many utilities to explore expansions of their portfolio of energy conservation programs, including opening the market to behavior-based programs such as Strategic Energy Management (SEM).

Clean Energy Transformation Act. 2019's Clean Energy Transformation Act (CETA) requires Washington State electric utilities to eliminate carbon emissions from their electric supply by 2045. Electric utilities in the state must develop and implement Clean Energy Implementation Plans (CEIP), which outline the actions the utilities will take to meet the state targets, including equitable distribution of clean energy benefits and programming. The plans must be updated and submitted every four years (WA Commerce 2025b). This law continued to support and push utilities toward energy efficiency as a resource.

Clean Buildings Foundational Policies in the Puget Sound

In 2019, Washington State passed the Clean Buildings Act, introducing the WA CBPS, the first statewide building performance standard for commercial buildings larger than 50,000 ft² known as Tier 1. A 2022 expansion bill added a new tier (Tier 2) for smaller commercial buildings between 20,000 ft² and 50,000 ft² and all multifamily buildings larger than 20,000 ft². An adaptation of ASHRAE Standard 100, the law requires owners of all covered buildings to benchmark energy usage using ENERGY STAR® Portfolio Manager® (Portfolio Manager), develop an Operations and Maintenance (O&M) Program, and develop an Energy Management Plan (EMP); additionally, commercial buildings over 50,000 ft² must satisfy an energy performance metric by meeting an Energy Use Intensity Target (EUI_t) or by performing an energy audit and implementing all cost-effective measures (WA Commerce 2025c).

This law essentially requires building owners to implement a foundational version of SEM. Although SEM has been deployed by several Northwest utilities for many years, the WA CBPS enables utilities to leverage more than just the “carrot” of incentives to motivate customers to save energy; it also adds the “stick” of regulatory compliance, further enabling utilities to support customers as they address this new challenge. The state's Department of Commerce (WA Commerce) administers the WA CBPS.

As the state policy took shape, the City of Seattle had already implemented citywide policies to address the need for emissions reductions in the built environment. Enacted in 2010, the Seattle Energy Benchmarking law requires non-residential and multifamily buildings larger than 20,000 ft² to benchmark their energy data, also using Portfolio Manager. Additionally, since 2017, all non-residential buildings larger than 50,000 ft² have been required to perform building assessments and tune ups through the Seattle Building Tune-Ups Ordinance (Ballinger et al. 2020), which will be sunset at the end of the 2026 reporting cycle, due to overlapping requirements with WA CBPS and the introduction of Seattle BEPS (City of Seattle 2026b).

In late 2023, the Seattle City Council passed the Seattle BEPS legislation, and the mayor signed it into law. Seattle BEPS requires buildings more than 20,000 ft² to verify energy benchmarking reports, calculate GHG emissions from annual energy use measured as GHG intensity (GHGI), meet a GHGI target (GHGIT), and report this data. The standard's final targets are net-zero emissions for all buildings by 2041-2050, depending on building size (Seattle OSE 2026). Although Seattle BEPS only applies to building owners in the City of Seattle, because many of them own buildings across different utility jurisdictions, the law does have an indirect impact across the Puget Sound region.

While WA CBPS focuses on directly reducing building energy use and indirectly lowering building emissions, Seattle BEPS effectively encourages both a reduction in overall building energy use and a transition to cleaner energy sources, like SCL's renewably generated electricity (City of Seattle 2026a).

Despite core differences between the city and state standards, namely the primary performance metric, many of the rules and requirements intersect or overlap. As utilities and municipalities develop customer support and programming to help building owners navigate compliance while reducing their building's energy use and emissions, the overlap in both territory and requirements make apparent a need for regional collaboration to ensure a streamlined experience for program participants.

Evolution of Clean Buildings Programming

Prior to the introduction of WA CBPS, a few Puget Sound region utilities had provided some degree of support for customers seeking to benchmark their buildings in Portfolio Manager. As the WA CBPS law was under development, several of these utilities tracked its progress and paid special attention to how the law attracted the interest of their customers.

In 2020, after the WA CBPS bill was signed into law, PSE and other area utilities began engaging with WA Commerce through the rulemaking process by participating in the department's utility forum. At the same time, Stillwater Energy (Stillwater) convened conversations with PSE and SCL about possibilities for how the utilities might engage and support their customers regarding the emerging law. This included connecting the dots between WA CBPS requirements and the tenets of SEM, which were deployed by Northwest programs as codified in the Consortium for Energy Efficiency's (CEE) SEM Minimum Elements (CEE 2024). In addition, the groups discussed approaches to utility program measurement and verification (M&V) that would leverage WA CBPS requirements. PSE decided to move forward with a pilot program, issuing a request for information (RFI) and request for proposals (RFP) to refine their program design and retain competitive program bids (Robinweiler et al. 2022).

Puget Sound Energy. To help their customers navigate the WA CBPS and achieve compliance and energy reductions, PSE engaged Stillwater to establish the Clean Buildings Accelerator (CBA) program in 2021. The CBA comprises five essential elements: information sessions, a sprint period, an elevation period, tools and resources, and M&V.

During the information sessions, the CBA introduces PSE commercial customers to the law and provides an overview of how the CBA program offering can support building owners on their path to compliance. After enrolling in the program, participating customers engage in a four-month sprint period that includes the following:

- Monthly virtual workshops covering law components such as benchmarking in Portfolio Manager, occupant engagement, the establishment and documentation of an O&M Program and an EMP, incentives, funding opportunities, and more
- Virtual controls reviews, or energy scans, of buildings enrolled in the program and that need to identify opportunities to reduce their Energy Use Intensity (EUI); these reviews result in the identification of low- and no-cost opportunities for improved energy efficiency
- Monthly coaching calls to review workshop content and assist with compliance requirements and questions
- Program-developed templates and tools to support development of the documentation required to meet compliance with WA CBPS

The subsequent elevation period spans 12 months directly following the sprint period and includes quarterly coaching calls and quarterly elevation seminars. These dive deeper into relevant and emerging topics, effectively “elevating” the participants’ knowledge of the law and energy management practices. The seminars provide CBA participants with regular and reliable updates as the law and requirements continue to evolve.

During the elevation period, customers begin implementing opportunities identified through their energy scans. Opportunities are provided to the customer through an opportunity register, which coaches help prioritize and track throughout the program.

After the elevation period concludes, participants return the updated opportunity registers, which provide the program administrator and modeling teams context to assess participant performance and program success. M&V is conducted for each site that receives an energy scan. This involves top-down, multivariable regression modeling of energy data and, while the results are not shared directly with participants, PSE claims any relevant savings (Robinweiler et al. 2022). When possible, energy data is captured directly through Portfolio Manager to streamline the process. Otherwise, the utility provides the necessary data to perform M&V.

Since its launch in 2021, the CBA has become synonymous with WA CBPS both inside and outside of PSE’s service territory. In fact, the acronym is often mistakenly confused with the law itself. What began as a pilot program has grown to span over 25 cohorts serving 270 customer organizations.

The CBA’s position as a trusted source of information and support has also boosted customer participation in PSE’s other demand-side programs. It is viewed as *the* showcase program for new commercial customer engagement by PSE’s team of account executives. PSE’s Commercial SEM (CSEM) program has grown significantly through an influx of CBA participants. Sustained participation in the CBA program has also spotlighted customers in need of deeper support or those in the planning phase for upcoming capital projects. Elevation seminars typically contain a focused session introducing CBA customers to other PSE programs and their respective program managers.

PSE’s customer-experience focus and its willingness to think creatively have nurtured the ideal conditions for the programs’ collaborative evolution. The Clean Buildings and SEM teams embody a solutions-focused mindset where challenges, such as cross-utility collaboration, are viewed as opportunities rather than impediments. Cooperation and collaboration with neighboring utilities that share customers with PSE was a logical and essential step in maximizing customer benefit and support.

Snohomish County PUD. After observing the successful launch of the PSE CBA, the PUD engaged Stillwater to pilot their own CBA in early 2022. The pilot achieved successful enrollment and high participant engagement, and later that year, the PUD expanded the program to include five additional cohorts and an extended program timeline. Between 2022-2025, a total of 37 participants across six cohorts graduated from the PUD’s CBA.

Coordination between partner utilities started in 2022. The PUD shares territory with PSE’s natural gas distribution, and both utilities saw great success in their respective CBAs. In late 2022, the two utilities entered into a cost-sharing agreement, wherein they shared coaching and energy scan costs for dual-utility participants enrolled in the PUD’s CBA. The joint support introduced shared customers to a streamlined process without the need to engage the utilities separately for benchmarking and related support. Dual-utility customers greatly benefit from the collaborative energy scans, which identify and target all opportunities irrespective of fuel type.

With engineers from both utilities present during scans, barriers to receiving direct utility technical and/or financial support are lowered.

M&V is performed separately for gas and electricity and paid for by the respective utility. By broadening program M&V to include both gas and electric use, regardless of utility, the multi-utility collaboration provides Stillwater a more comprehensive understanding of whole-building efficiency gains.

With a smaller customer base to pull from, it became more difficult over time for the PUD to fill entire cohorts. In mid-2025, the utilities flipped the model, and the PUD began splitting energy scan and coaching costs for shared customers enrolled in the PSE CBA. They also began co-sponsoring and sharing costs for continued customer education through the CBA Elevation Seminars.

Through the CBA's success, it became apparent to the PUD that there was both a need and a customer desire to engage more deeply in energy-efficiency programs for commercial buildings. In 2023, the PUD launched their first CSEM cohort, offering deeper support with in-person energy scans, ongoing coaching calls, energy management assessments, workshops that addressed technical and organizational components of energy management, and performance incentives for energy reduction. Like with the CBA, the PUD and PSE recognized an opportunity to combine efforts with greater customer support and entered a similar cost-sharing arrangement for dual-utility participants. The program has launched a new cohort each subsequent year, with a total of 29 participants across three cohorts to date. By engaging with multiple utilities and fuel types through one program, participants gain a comprehensive understanding of their whole building performance and can build strategies to address a broader range of energy management activities.

With the goals of streamlining the experience for participants and reducing costs for both utilities, Stillwater operated as the hub for communication. This allowed Stillwater to help both participants and utilities overcome pain points, develop separate contract agreements with each utility, and facilitate general coordination. What started as a simple agreement to share savings in the CBA expanded to the CSEM program and further evolved into building out deeper collaborations with multiple program administrators by both utilities.

The City of Seattle. OSE, through its Buildings & Energy Program, works to reduce the climate-changing impacts of buildings and their emissions through policies, laws, and technical support programs with a focus on climate justice. OSE saw a need to help Seattle building owners and operators navigate compliance with the WA CBPS, especially those who are under-resourced and already covered by Seattle's benchmarking and tune-ups requirements. OSE also recognized an opportunity to achieve emissions reductions from buildings during the development of the Seattle BEPS legislation (Ballinger et al. 2024). OSE contracted with Stillwater, and the Seattle Building Emissions Navigator (Seattle Navigator) program (originally called the Seattle Clean Buildings Accelerator) was launched in 2022 to deliver on both objectives. From the program's inception, there has been an emphasis on outreach to and recruitment of priority audiences¹. Funded by OSE, the Seattle Navigator is one of the City of Seattle's key technical support programs to assist building owners and operators on their path to compliance and to achieve net-zero emissions by 2050 (Ballinger et al. 2024). Since OSE launched the program, the Seattle Navigator has trained and coached 89 organizations with more

¹ Priority audiences are defined by OSE as nonprofit owned and operated buildings, buildings located in and serving frontline communities, and subsidized and unsubsidized low-income housing.

than 150 participating buildings, and over 50% of those program participants are from priority audiences.

Shortly after OSE launched the Seattle Navigator, SCL saw an opportunity to both support building owners and operators, as well as capture savings from the program. SCL became a program partner with OSE to actively collaborate and coordinate in the support of building owners and operators within the City of Seattle. SCL provides funding for onsite and virtual energy scans where the program helps participants identify low- and no-cost energy saving and emissions reduction opportunities. SCL also pairs each participant with a SCL energy management analyst (EMA) who supports participants in taking advantage of SCL's many programs, incentives, and rebates.

In order for SCL to claim savings for OSE Navigator participants, M&V is conducted for each site that receives an energy scan. This involves a streamlined M&V approach that uses whole-facility regression models aligned with the BPA SEM M&V Guide (BPA 2024) and consistent with IPMVP Option C best practices and, while the results are not shared directly with participants, SCL claims any relevant savings. When possible, energy data is captured directly through Portfolio Manager to streamline the process. Otherwise, the utility provides the necessary data to perform M&V.

At the same time, SCL wanted to support its customers outside of the Seattle city limits with WA CBPS compliance efforts, so they partnered with PSE to support shared electric and gas customers. SCL and PSE actively cross-promote each other's program offerings, and in spring of 2025, they joined forces to host an open house event. Customers across SCL and PSE service territories were invited to the event to learn more about WA CBPS compliance. 35 people attended with a high degree of engagement. In 2025, SCL and PSE began a cost-sharing arrangement similar to the PUD's, in which SCL splits costs of CBA energy scans and coaching calls for customers shared with PSE. When SCL launched its first SEM program in 2025, Stillwater worked with both utilities to create separate contract agreements that would allow the utilities to capture savings and split the program costs of workshops and shared-customer activities, allowing for more enhanced programming and customer support.

The figure below visually demonstrates the timing and relationship to the collaborations that have occurred since 2021.

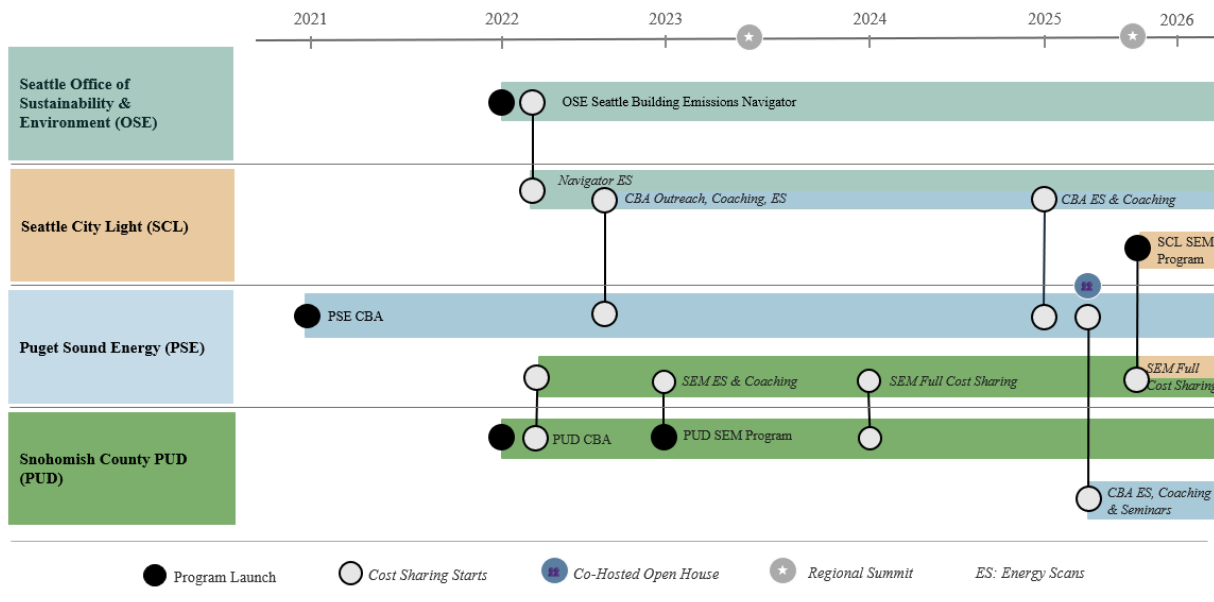


Figure 3. Regional Collaboration across clean buildings offerings, 2021-2026.

Collaborative Program Design Approaches

Pain Points

As the programs evolved over the last six years, program administrators identified unique challenges that emerged. Despite achieving success throughout the various programs, the nature of the shared territory and the crossover of multiple regulatory policies introduced an opportunity for regional program administrators to solve these challenges together:

- Shared customers were offered competing support and programming from multiple program administrators.
- There was ambiguity about which customers needed to comply with which law(s) and what funding sources were available to help them do so.
- Utilities with more than 25,000 customers are required by WA CBPS to automate data uploading for benchmarking into Portfolio Manager. Many utilities' existing systems and customer support were not set up for this challenge, and they had to figure out how to effectively serve these customers with this new legal requirement.
- Program administrators paid for duplicate workshops and events, which was an inefficient use of funds in the region.
- Regional marketing opportunities were limited; partner organizations were repeatedly approached by different entities about similar programs, which led to confusion, redundancy, and partner fatigue.
- Program marketing, awareness, and training were primarily conducted virtually, potentially excluding certain market segments and creating inequities benefiting those that are more tech savvy.
- As more statewide groups and vendors began offering services, it was difficult for the program administrators' free programs to stand out from the marketing noise.

- Deceptive vendor-sourced marketing scare tactics created fear and uncertainty with program administrators' customers.
- Each program administrator has different confidentiality requirements for how customer data is shared or whether it even can be shared with external parties. This created a roadblock to cross-promotion and information sharing as programs began to expand and recruit.

These challenges reflect the range of structural barriers that are common to regions with overlapping jurisdictions and emerging regulatory requirements.

Collaborative Innovations Across the Region

The unique cost-sharing arrangements across the region between program administrators opened the doors to finding collaborative solutions to many of the pain points, including spreading the cost of time-intensive activities, developing new program offerings, and combining recruiting and marketing efforts. Below are some of the innovative approaches that were developed to support a positive customer experience across programs.

Shared marketing and recruiting. To avoid inundating customers with multiple similar offerings and potentially introducing confusion about what compliance was necessary, it was essential for program administrators to carefully manage their marketing and recruiting efforts in the crossover territories. The programs accomplished this by using careful coordination with community-based organizations (CBOs), trade organizations, and government agencies. The program administrators developed and provided shared messaging that promoted all the regional offerings. For example, WA Commerce regularly included listings of upcoming cohorts and support in their weekly Clean Buildings bulletin. This provided Washington building owners with a trusted, reliable recommendation for WA CBPS support, helping them navigate some of the marketing noise and misleading vendor communications that had crowded the market.

Sharing customer information. To navigate customer information constraints across the region, the program administrators developed tailored approaches that honored each organization's confidentiality requirements while still enabling coordinated support. For PSE, which is unable to share customer data directly, Stillwater submitted a public information request to WA Commerce to obtain the necessary records for cross-program coordination. Meanwhile, to address the PUD's data-sharing limitations, Stillwater received approval to identify overlapping PSE customers who needed to enroll, while ensuring that information about customers served solely by the PUD remained fully confidential. This combination of transparency, process design, and careful data stewardship allowed the programs to maintain compliance with privacy rules while delivering a more streamlined experience for participants.

Shared program implementation. As program administrators began to see the positive results of collaborating and sharing information, they became open to sharing more program costs. Initially, when the PUD kicked off their SEM program, PSE supported only those activities that directly impacted gas savings for dual-utility customers; this included funding gas energy models and splitting costs of in-person energy scans. The rest of the program was paid for solely by the PUD. However, as the gas savings came in and the success of the program became apparent, PSE offered to split the rest of the program implementation, allowing the scope of the SEM

program to expand and therefore serve more customers. Now, both PSE and the PUD equally fund the program, splitting all coaching call and energy management assessment costs for dual-utility customers and sharing the workshop costs of the program equally. After observing the success of this cost-sharing model, SCL and PSE implemented a similar cost-sharing arrangement for dual-utility customers in the SCL CSEM program.

Co-sponsored customer engagements. Not only did co-sponsoring customer engagements improve cost effectiveness of the programs and reduce redundancy for participants, but the success of these arrangements opened the door to collaborate on additional offerings. In 2025, PSE and OSE designed and delivered a Seattle BEPS webinar for all past PSE CBA participants who owned buildings in Seattle. This webinar helped bring PSE CBA participants up to speed on Seattle BEPS and its requirements. That year, OSE and SCL also collaborated to help coordinate Building Efficiency and Clean Operations Network Fellows (BEACON Fellows) for Seattle Navigator participants. WA Commerce provided the BEACON Fellows, in partnership with the Smart Buildings Center Education Program, Strategic Energy Innovations (SEI), and San Timoteo Energy Associates, to offer technical support for building owners who needed compliance support (WA Commerce 2025a).

When Tier 2 building owners were notified in summer 2025 of their need to comply with WA CBPS, the utilities saw an uptick in benchmarking and data assistance requests. PSE began offering customers, including those with dual-utilities, low-touch benchmarking seminars that were tailored to help with the benchmarking requirements of the law. After each seminar, PSE encouraged participants to join separate follow-up sessions sponsored by PSE and the PUD, which provided utility-specific support to connect Portfolio Manager to the utilities' data platforms. This provided a seamless experience for customers to step through the benchmarking requirements without needing as much individual support.

Collaborative enrollment process. After a few iterations of the enrollment process in multiple programs, Stillwater facilitated the creation of a single web-based enrollment form that met each program administrator's requirements while not overburdening their shared participants. The resulting enrollment process has significantly reduced support requests compared to the original approach. It has also accelerated the time from first touch to final enrollment signature. By collaborating, cost burdens have been shared, and cost effectiveness has stayed high.

Cross-program, sector-specific support. With the WA CBPS Tier 2 expansion to include smaller commercial buildings and multifamily buildings, the pool of customers needing support grew substantially. The CBA, Seattle Navigator, and SEM programs around the region began developing specific multifamily content, including sector-specific cohorts, and new ways of reviewing site equipment and identifying energy-efficiency and emissions reductions opportunities. This was another great opportunity for collaborative recruiting and the program administrators worked together to develop marketing messaging to be shared by partner organizations.

In-person trainings. Unlike in its previous virtual-only cohorts, the Seattle Navigator began offering in-person engagements in 2025, such as 2-day intensive workshops that covered training content from the entire 4-month virtual sprint. The Seattle Navigator also began offering on-site energy scans for participating buildings that could not receive virtual controls reviews. SCL attended the in-person workshops to offer direct customer support to participants, and SCL

EMAs joined Stillwater engineers at on-site building energy scans to bring additional value to the customers. OSE and SCL's shared budget enabled this elevated customer support and helped participants identify more O&M and capital opportunities than they may have in a virtual-only environment, particularly for those without advanced building control systems.

In-person open house. In spring of 2025, PSE and SCL co-hosted a Clean Buildings open house in Tukwila, WA. The intent was to provide a short-duration, in-person event to showcase the program administrators' various support offerings, with the Clean Buildings law serving as a connective backdrop. It focused on getting the word out to those building owners who had not yet been reached through virtual trainings and marketing. The team strategically chose the venue, a local community center rather than a large utility or state office building, to help foster the community-focused intent of the open house. The event was open to commercial customers in PSE and SCL shared territory. WA Commerce and the Smart Buildings Center (an organization that also supports the program administrators with CBPS awareness and provides a benchmarking hotline for OSE) also attended and contributed to an unparalleled level of law-knowledge and support to the utility customers.

35 participants had the opportunity to meet one-on-one with representatives from the partnering organizations to dig into their nuanced compliance questions. The design of the open house encouraged attendees to stop at various tables, each focused on a different law topic. This structure highlighted the numerous ways the program administrators and other organizations offer compliance and funding support to customers.

Program administrator regional summit. In late 2025, Stillwater convened representatives from the PUD, PSE, SCL, OSE, and Tacoma Power to discuss the current state of SEM, Clean Buildings, and other customer offerings in the Puget Sound region. This was the second in-person convening of the group, with the first meeting focused on equity and the second focused on program design, Tier 2 opportunities, marketing, recruiting, and decarbonization.

The attendees shared the current state of their programs, learnings, challenges, and ideas for the future. They brainstormed and identified numerous opportunities for collaboration, including joint program design, shared in-person customer events, unified recruitment and messaging, and cross-marketing campaigns. With an acknowledgment that recruiting and decarbonization is particularly difficult for all attending organizations, they each expressed great interest in continuing to meet regularly to further explore their shared challenges and ideas. In future regional meetings, the group will discuss how AI can be utilized in SEM and M&V, how to elevate WA CBPS Tier 2 offerings, how to improve multifamily engagement, and which partner organizations to engage for raising awareness of the laws and program offerings.

Key Takeaways

Lessons Learned

The Puget Sound region's experience demonstrates that multi-utility and multi-agency collaboration is not only possible but essential for supporting building owners through compliance with overlapping building performance standards. In general, collaboration can also increase cost effectiveness for administered energy efficiency programs. The lessons emerging from this work reflect the complexities of regulatory alignment, shared customer bases, data constraints, and market conditions—alongside the opportunities created when program

administrators work together toward shared outcomes. By applying the following lessons, program administrators can accelerate progress, improve customer experience, and build resilient, collaborative partnerships.

Identifying clear roles, boundaries, and shared expectations eases confusion. Early alignment on goals, confidentiality constraints, regulatory responsibilities, and each organization’s role can create a foundation for durable partnerships. Establishing these guardrails up front helps collaborators avoid friction later and make it easier to sustain high-quality joint work overtime.

Coordination is essential to reduce customer confusion and program duplication. The combination of shared customers, overlapping utility territories, and intersecting requirements such as WA CBPS and Seattle BEPS make uncoordinated support inefficient and confusing. Coordinating outreach, aligning guidance, and sharing delivery mechanisms helps create a more consistent customer experience while improving administrative efficiency.

Shared implementation and cost-sharing expands support while making programs more efficient. Joint funding of coaching, energy scans, workshops, and other customer services allows program administrators resources to go further and provides streamlined integrated assistance. These arrangements reduce redundancy, improve whole-building support for dual-utility customers, and create space for expanded offerings that no single organization would have been as well positioned to provide alone.

Unified messaging, simple enrollment, and coordinated engagement build trust and improve participation. Shared marketing materials and messaging, centralized or coordinated communications, co-sponsored events, and streamlined enrollment processes help cut through market noise and reduce partner fatigue. These practical design choices make it easier for customers to understand their options, access support, and engage with programs confidently.

Regular feedback loops and shared learning help collaboration evolve and remain replicable. Ongoing cross-program meetings and regional convenings help partners identify pain points, compare approaches, and adapt to changing customer and policy needs. These learning loops improve program design.

Tips and Tricks

Successfully supporting customers across overlapping regulatory requirements and shared territories requires more than well-designed programs; it requires practical, repeatable strategies that make collaboration work in the real world. The Puget Sound region’s experience reveals a set of simple but powerful practices that help streamline processes, reduce customer confusion, and strengthen multi-agency coordination. The tips and tricks below highlight the on-the-ground approaches that proved most effective and can serve as a roadmap for other regions navigating similar challenges.

Table 1. Tips and tricks for successful program administrator collaboration

Theme	Tips and tricks
Build strong foundations early	• Align early on goals, roles, and boundaries. • Understand each agency's expectations before launch. • Discuss data sharing limitations up front.
Coordinate outreach and messaging	• Create shared marketing materials. • Use unified messaging across agencies. • Coordinate contact with partners to avoid fatigue.
Make enrollment simple and shared	• Use joint enrollment forms/websites when possible. • Reduce duplicate entry for customers.
Share costs to expand support	• Identify beneficial activities for cost-sharing. • Use cost-sharing to serve the most joint customers across the region.
Deliver a seamless customer experience	• Align content across the region. • Present a unified face. • Deal with the complexities of collaboration behind the scenes.
Combat misinformation with a unified voice	• Develop consistent, trusted, regional messaging. • Align responses to misleading vendor information. • Use state agencies as amplifiers.
Create regular learning loops	• Hold regular (annual, semi-annual, or quarterly) cross-agency strategy meetings. • Share challenges, lessons, and future opportunities. • Explore innovations together.
Share tools, templates, and designs freely	• Reuse workshop materials, SEM components, forms, and templates across programs. • Avoid reinventing the wheel.

Conclusion

The results presented in this paper demonstrate that collaboration delivers more than anecdotal coordination benefits; it materially improves program reach and cost-effectiveness in implementation. For instance, for all cost-shared activities, utilities' costs decreased by 50%. Since 2021, more than 270 participating organizations reported savings exceeding 431,819 kgCO_{2e}, demonstrating that coordinated delivery can translate regulatory requirements into measurable regional energy and emissions outcomes. Customers in cost-sharing programs benefitted by addressing the entirety of their utility-based energy use as opposed to only gas or electricity. The most important finding is that shared marketing efforts, aligned technical support, cost-sharing, and strong coordination reduce duplication and enable customers and administrators to navigate overlapping requirements more effectively. In this sense, cross-program collaboration enables regionwide infrastructure for transformative whole-building energy management rather than piecemeal efforts with disjointed results.

This success was made possible by leaning on pre-existing communication channels and by the program administrators' willingness to deepen partnerships, build on early successes, and adapt their approaches over time. Looking ahead, the region can broaden its impact by engaging additional program administrators, developing stronger collaborative processes for recruitment

and implementation, and addressing emerging challenges such as decarbonization. Policies in Washington State and the City of Seattle will continue to evolve over time, and it will be essential to continue maximizing collaboration and coordination to overcome current and emerging challenges.

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