**BPA's Northwest Energy Efficiency Income Qualified Workgroup**

October 6, 2025 | 9:00am-12:00pm Pacific | Hosted by the BPA EEIQ Team

***Meeting Materials***

* **Agenda** [posted here](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-agenda.pdf).
* **PowerPoint slides** [posted here](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf).
* **Past and current meeting information** can be [found on the EEIQ homepage under “Meeting Materials Archive”](https://www.bpa.gov/energy-and-services/efficiency/ee-sectors/energy-efficiency-income-qualified/income-qualified-state-resources).

***Summary Notes***

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| General Updates – Amy Burke, BPA  See slides 4 – 11 in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf). As outlined in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf), there has been a marked increase in both utility spending, utility savings, and grant spending over the last rate period. Over 1,000 homes have bene weatherized, 1.5 million sq ft of insulation installed, and many HVAC systems and appliances have been replaced with more efficient systems. We have also seen a record number of utilities participating in this program as well. It has been a very successful rate period for this program! The program name has officially changed from “Low Income” to “Income Qualified”, which may impact some URLs including [BPA’s IQ program homepage](https://www.bpa.gov/energy-and-services/efficiency/ee-sectors/energy-efficiency-income-qualified/income-qualified-state-resources). The Optional IQ Project Information Form has been updated as well in all three formats:   * [Income Qualified Project Information Form + Income Verification (Optional – Customizable Word Document)](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/optional-eeiq-project-information-form.docx) * [Income Qualified Project Information Form + Income Verification (Optional – Fillable PDF)](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/optional-eeiq-project-information-fillable-form.pdf) * [Income Qualified Eligibility Form (Optional)](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/optional-eeiq-eligibility-form.pdf) |
| Lifecycle of a BPA Measure – Phillip Kelsven, BPA  See slides 12 – 31 in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf). Phillip Kelsven is a BPA Energy Efficiency Representative (EER) is a liaison with the both the Regional Technical Forum (RTF) and Northwest Energy Efficiency Alliance (NEEA) and worked for many years on the Energy Efficiency Planning team with Residential Measures. He provided an overview of how and why BPA deemed measures are created, the different pathways of how BPA aims to maintain a balanced portfolio of deemed measure offerings, and how and why some measures are expired. Additional follow-up questions about this content can be sent to [ResEEprogram@bpa.gov](mailto:ResEEprogram@bpa.gov). You can access the BPA UES Measure List and the BPA Implementation Manual (both effective Oct. 1, 2025) [here on this webpage](https://www.bpa.gov/energy-and-services/efficiency/implementation-manual).  Summary of questions and answers below.   * *Q: How is new data collected? How can weatherization agencies help gather data to support these efforts?*   + Collected through the Residential Building Stock Assessment (RSBA), which is unique to the Northwest region. It captures existing values and demographics and house data sets to provide to the Regional Technical Forum (RTF).   + Community Action Partnership (CAP) agencies can possibly provide cost data to help ensure that cost caps are correct and accurate.   + *The EEIQ team will follow up with the BPA Planning team and Phillip to see if there are other opportunities for CAPs to support this deemed measure development process.* * *Q: Any idea when the new Unit of Energy Savings (UES) for income qualified will be available?*   + Unknown, currently attempting to obtain better data. * *Q: Is there a difference in measure savings between work that is inspected by a quality inspector and measures that are not inspected, but assumed to be installed correctly?*   + While this hasn’t been accounted for or studied explicitly in BPA evaluations, it does show up in the averages. This is something BPA is planning on studying in the future. The idea is that quality inspections and quality installs will result in longer-term savings and performance. * *Q: Who is a part of the RTF?*   + RTF is composed primarily of utility staff, consulting firm staff, independent consultants and engineers. There is a call for new RTF members every three years. * *Q: Since the RTF meetings are open to all, is it helpful for those who use deemed measures to attend and advocate for measures? How can folks track what’s up for discussion, and are there specific contacts?*   + Yes, it is very helpful! It is a public process so attendees can comment and provide feedback from the field about how these measures impact their work and residents. Direct feedback from utilities and agencies that implement these measures can be very influential.   + Those interested can check the [RTF’s calendar](https://rtf.nwcouncil.org/calendar/). BPA staff sometimes does a call out for additional utility attendees when there are critical discussion topics. However, the more proactive utilities and agencies are, the better the responses are received.   + Link to RTF meeting calendar: <https://rtf.nwcouncil.org/calendar/>. Interested attendees can click on the link for the “RTF Meeting” on the relevant date and register for the webinar directly.   + Link to RTF work products/measures: <https://rtf.nwcouncil.org/work-products/>   + *The EEIQ team will follow up with the BPA Planning team and Phillip to see if there is a better way to engage Workgroup attendees when key topics come up to discussion at the RTF.* |
| Overview of BPA Repair Costs and Guidance Document – Amy Burke, BPA  See slides 32 – 46 in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf). Amy Burke provided a summary recap of the information presented on in the October 2nd webinar about [Reporting Residential Measure and Income Qualified Repair Costs](https://www.bpa.gov/-/media/Aep/energy-efficiency/presentation-webinars/Residential-Costs-BEETS-Repair-Costs_251002.pdf). The video of this webinar [has been posted here](https://youtu.be/PvIzxmPxAJI).  The [Income Qualified Repair Cost Reference Table](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/Repair-Cost-Reference-Table.pdf), posted in the [BPA Document Library](https://www.bpa.gov/energy-and-services/efficiency/document-library), is a reference table that is meant to improve transparency about how if certain measure-related repairs are eligible for reimbursement. This list is not comprehensive and will be updated as necessary, especially since it is a new resource. When prompted, attendees didn’t request any other specific support to navigate edible repair costs at this time. Additional follow-up questions about this reference table can be sent to [ResEEprogram@bpa.gov](mailto:ResEEprogram@bpa.gov) or utilities can reach out to their EERs.  Summary of questions and answers below.   * *Q: What kinds of repairs do you see most often?*   + EPDM roof covers, rodent damage, miscellaneous wiring and electrical hazards, noncompliant electrical panels (including Federal Pacific panel repair/replacement), and plumbing.   + Door and window frame/sill rot and replacements, including many older homes that have frames that won't accommodate new windows and often have rot.   + New doors that don’t fit in older door frames, requiring a rebuild   + Damaged or failing floor insulation   + Plumbing leaks in crawl space   + Skirting repair for mobile homes   + Access panel repair or complete replacement   + Mold issues inside living space * *Q:* *If someone has water leaks and they must remove the insulation due to mold etc., can the insulation be counted as R0 for the beginning R-value?*   + This is TBD at the moment as the EEIQ team is working with the Weatherization program manager and BPA staff for guidance on this question. Once determined, guidance will be added to the [Income Qualified Repair Cost Reference Table](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/Repair-Cost-Reference-Table.pdf). |
| Rate Period Updates – Amy Burke, BPA  See slides 47 – 65 in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf). Amy Burke provided a high-level summary recap of updates for the new Rate Period for both utility and grant programs that impact Income Qualified program offerings. The big caveat is that these changes are at the BPA level and any utility, state agency, tribe, CAP, or other implementer of these measures may implement the programs as needed, so they may adopt some or all of these changes at their discretion.  Payment cost caps have not increased this rate period. However, two positive callouts are that the baseline for windows now allows for replacing windows with any existing frame type, including vinyl. Also, non-Income Qualified incentive levels for heat pump water heaters have doubled.  The Utility Income Qualified Program 101 webinar hosted in July 2025 is posted online:   * [Presentation Slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/presentation-webinars/Webinar-startingaBPAIncomeQualifiedUtilityProgram-7-17-2025.pdf) * [Recorded Webinar](https://www.youtube.com/watch?v=Mlkp_ScygiU&feature=youtu.be) * [EE Presentations & Webinars Homepage](https://www.bpa.gov/energy-and-services/efficiency/presentations-and-webinars)   The [BPA Audit Results webinar PowerPoint is posted online here](https://www.bpa.gov/-/media/Aep/energy-efficiency/presentation-webinars/250925-Audit-Findings-Webinar.pdf) for reference. IQ team staff have no other details at this time about how the results of this audit will impact IQ program offerings but will be sharing out as those details emerge.  The EEIQ staff worked with grantees from the four state agencies to update and clarify content in the four BPA Income Qualified State Grants to prep and implement by October 1, 2025. The summary document reviewing updates to the [BPA Income Qualified State Grants has been posted here](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/eeiq-state-grant-rate-period-fy26-28-update-summary.pdf) for reference.  There are several additional efforts ongoing to further improve this program and implementation. |
| Inland Power’s CARE Program – Haley Puntney, Inland Power  See slides 68 – 74 in the [PowerPoint slides](https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/251006-eeiq-workgroup-powerpoint.pdf). Haley Puntney from Inland Power to present on their CARE Program. She is the Senior Energy Services Specialist and manages this program. She provided some excellent insight into why they offer this program, including starting with needing some additional options to spend their BPA EEI budget that developed into seeing how this really provided a great service to many residents who really needed additional support. They crunch numbers and got approval from their management team and kicked off a soft launch of the program. Attendees can reach out to Haley direction with additional follow-up questions by emailing [haleyp@inlandpower.com](mailto:haleyp@inlandpower.com).  Example program documents and agreements attached on the next page.   |  |  | | --- | --- | | * **Contractor Agreement** |  | | * **Subcontractor Agreement** |  | | * **CARE Member Agreement** |  | | * **CARE Member Certification Release and Approval** |  |   Summary of some of the questions:   * *Q: What % of your budget did you allot to the CARE Program each year? Was there a max per customer?*   + No specific percentage was allotted and instead determined how much to spend on specific technologies or approaches.   + Conducted a three-year forecast from previous data and they spent close to 40% of total EEI budget.   + There’s no max spend is set per customer, but the average claimed invoice was between $10,000 – $13,000 for the whole home. * *Q: Do you verify income by self-attestation or do you verify the customer's income?*   + Done via self-attestation. They have been happy with this process because they know their demographics well. * *Q: What is that % allowed (for rent increase)? And is that for only two years? Is that correct?*   + For rental properties, Inland requires landlords sign an agreement when EE upgrades are made that they can’t raise the rent for one year based on value of home at time of work.   + State and county work to review the percentage increases and Inland is not involved in policing that. Landlords can still increase rent to account for property tax.   + Example of landlord agreement attached above.   + Maintaining a good relationship with the community and landlords and staying very involved helps to facilitate these programs. * *Q: Are there opportunities to pair with weatherization readiness funds?* That is the hope in the future! |
| Open Discussion  With the start of the new rate period and with some of the LIHEAP and other federal funding sources on hold for now, some attendees are moving along in their work and others are in a wait and see state, looking for other funding opportunities.  Regarding the delayed LIHEAP funding, Congress had not approved the appropriation of this funding as of this meeting. CAPs were advised to use the rest of year’s funding, but some CAPs don’t have any carryover and are waiting for that appropriation.  Summary of questions and comments:   * *Q: Since By-Request has gone away, what are people doing in regard to retail programs?*   + Some are doing some direct install income qualified Thermostat measures, but no By-Request. * *Comment:* Okanogan PUD is beginning a new self-funded IQ program and will continue to partner with our CAP agency. The CAP agency has contractors. The new program adds funding to the existing measures. The hope that this will enable the CAP to help more homeowners. They are attempting their first every * *Comment:* Okanogan County Electric Co-op will be attempting their first ever IQ offering. So excited and terrified about the roll out! Hoping to work with their local resource center to connect with the Okanogan County CAP agency that Kim at Okanogan PUD will be working with. * *Q: What new topics are people interested in hearing about in the future?*   + Uncertainties on the federal level and on funding. What things can organizations be certain about? How can we leverage programs or find flexibility?     - LIHEAP dollars were distributed last year.     - Grant programs are still moving forward. Knowing what ways that CAPS can be supported is helpful. We will be supportive and reactive, flexible, where they can be.     - LIHEAP from 2025 may be available in 2026, depending on what’s in contract or from local agencies. * *Q: Curious about any creative partnerships around low-income on-bill financing. Any current examples?*   + Inland has an on-bill financing program. * *Comment:* Ravalli Electric has been working on an IQ program similar to what Haley has going (took a lot of the format from her). They were able to find a contractor who does their own insulation, duct sealing, weatherization, and subcontracts HVAC work. They are excited to help. The challenge is getting the qualification steps for IQ homeowners set up at this time. |
| Closing: Next Steps   * + Next Steering Committee Meeting: November/December 2025   + Next Workgroup Meeting will be in February 2026 * *Suggested Agenda Topics: Success Highlights, Outcomes from The Energy Project Summit, Program Success Metrics, Aligning Misaligned Project Requirements between CAPs and Utilities* |
| *Action Items:*   * *IQ Team to connect with Lisa Espinoza regarding the UES IQ update.* * *EE team to connect with Casey Mitchell regarding future data analysis on inspections by quality inspectors.* |