



**TRIBAL ENERGY EFFICIENCY INCOME QUALIFIED (EEIQ) GRANT
TERMS AND CONDITIONS**

Effective October 1, 2025 – September 30, 2026

The BPA Funding Announcement and Budget Application Template for this grant can be found on [BPA's Tribal Income Qualified homepage](#). Instructions on applying for this BPA Tribal Energy Efficiency Income Qualified Grant can be found in the [BPA Funding Announcement](#).

**FISCAL YEAR 2026
TRIBAL ENERGY EFFICIENCY INCOME QUALIFIED (EEIQ) GRANT
TERMS AND CONDITIONS**

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UNIT 1 – TERMS & CONDITIONS

CLAUSES INCORPORATED BY REFERENCE

This award incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at the following URL address:

Bonneville Financial Assistance Instructions Manual clauses (BFAI): <https://www.bpa.gov/energy-and-services/customers-and-contractors/financial-assistance-instructions-manual>

Clause 1 Regulations Applicable To BPA Financial Assistance (JUL 2017)
Clause 2 Legal Authority And Effect (JUL 2017)
Clause 3 Non-assignability (JUL 2017)
Clause 4 Compliance With Federal, State, And Municipal Law (JUL 2017)
Clause 5 Inconsistency With Federal Law (JUL 2017)
Clause 7 Contracting Officer's Representative (OCT 2018)
Clause 10 Federal Stewardship (OCT 2018)
Clause 12 Nondisclosure And Confidentiality Agreements Assurances (JUL 2017)
Clause 13 Foreign Work and Travel (JUL 2021)
Clause 14 Purchases (JUL 2017)
Clause 15 Lobbying Restrictions (JUL 2017)
Clause 16 Export Controls (JUL 2017)
Clause 18 Extensions Of Period Of Performance (JUL 2017)
Clause 19 Property Trust Relationship & Insurance Coverage (JUL 2017)
Clause 22 Title To And Disposition Of Property (OCT 2018)
Clause 23 Record Retention (JUL 2021)
Clause 24 Audits (OCT 2018)
Clause 25 Suspension Or Termination (JUL 2017)
Clause 26 Claims, Disputes, And Appeals (JUL 2017)
Clause 27 Reporting Program Performance (JUL 2021)
Clause 29 Payment Requests (JUL 2017)
Clause 30 Advance Payment And Financial Reporting Requirements (OCT 2018)
Clause 31 Reimbursement Payment & Financial Reporting Requirements (OCT 2018)
Clause 32 Budget Changes (JUL 2021)
Clause 33 Incremental Funding (JUL 2017)
Clause 34 Insolvency, Bankruptcy Or Receivership (OCT 2018)
Clause 35 Nondiscrimination In Federally Assisted Programs (JUL 2017)
Clause 36 Environmental Protection (JUL 2021)
Clause 39 Felony Conviction And Federal Tax Liability Assurances (JUL 2017)
Clause 40 Drug-Free Workplace Requirements For Financial Assistance Awards (JUL 2017)
Clause 43 Indemnity (OCT 2018)
Clause 44 Environmental, Safety, And Health (OCT 2018)
Clause 45 Small Unmanned Aircraft (UAS) (JUL 2021)
Clause 46 Closeout (JUL 2021)
Clause 50 Buy America Requirement For Infrastructure Projects (FEB 2023)

CLAUSES INCORPORATED BY FULL TEXT

CLAUSE 17 PUBLICATIONS (JUL 2017)

BPA encourages the Recipient to publish or otherwise make publicly available the results of work performed under this Award. The Recipient is required to include the following acknowledgement in publications arising out of or relating to work performed under this Award:

Acknowledgment: "The information, data, or work presented herein was funded in part by the Bonneville Power Administration under Award Number [REDACTED]. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof."

UNIT 2 – STATUTORY AND NATIONAL POLICY REQUIREMENTS

Financial assistance awards are subject to the following statutory and national policy requirements below. By signing or accepting the funds under the financial assistance award, the recipient agrees that it will comply with applicable provisions below.

Description	Type of Award	Type of Recipient	Specific Situation	Flow Down Requirements
NONDISCRIMINATION				
On the basis of race, color, or national origin, in Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d, et seq.), as implemented by: DOE at 10 CFR Part 1040	All	All	All	Requirements flow down to subrecipients.
On the basis of race, color, religion, sex, or national origin, in Executive Order 11246 [3 CFR, 1964-1965 Comp., p. 339], as implemented by Department of Labor regulations at 41 CFR Part 60 and EPA at 40 CFR Parts 7 and 12.	Grants, cooperative agreements, and other prime awards defined at 40 CFR 60-1.3 as "Federally assisted construction contract."	All	Awards under which construction is to be done.	Requirements flow down to construction subrecipients.
On the basis of sex or blindness, in Title IX of the Education Amendments of 1972 (20 U.S.C. 1681, et seq.). DOE at 10 CFR Part 1040	All	Educational institution [for sex discrimination, excepts all Institution controlled by religious organization, when inconsistent with the organization's religious tenets].		
On the basis of age, in the Age Discrimination Act of 1975 (42 U.S.C. 6101, et seq.), as implemented by Department of Health and Human Services regulations at 45 CFR part 90. DOE at 10 CFR Part 1040	Grants, cooperative agreements, and other awards defined at 45 CFR 90.4 as "Federal financial assistance."	All	All	Requirements flow down to subrecipients.

Description	Type of Award	Type of Recipient	Specific Situation	Flow Down Requirements
On the basis of handicap, in: Section 504 of the Rehabilitation Act of 1973 (29 USC 794), as implemented by Department of Justice regulations at 28 CFR Part 41 and DOE at 10 CFR Part 1040.	Grants, cooperative agreements, and other awards included in "Federal financial assistance"	All	All	Requirements flow down to subrecipients.
The Architectural Barriers Act of 1968 (42 USC 4151, et seq.).	Grant or loan	All	Construction or alteration of buildings or facilities, except those restricted to use only by able-bodied uniformed personnel.	
Americans with Disabilities Act. 42 USC 12101 et. seq	All	All		
LIVE ORGANISMS				
For human subjects:				
For human subjects, the Common Federal Policy for the Protection of Human Subjects. Codified by the: DOE at 10 CFR Part 745	All	All	Research, development, test, or evaluation involving live human subjects.	Requirements flow down to subrecipients
P.L. 104-191 Health Insurance Portability and Accountability Act (HIPAA)	As applicable	Covered Entities	As applicable	Limits uses of protected health information (PHI) collected or maintained by researchers within a covered entity or access to PHI from a covered entity. Research uses do not require Business Associate Agreements (defined at 45 CFR part 164 504 (e)(1) between collaborating institutions. Guidance available at http://privacyruleandresearch.nih.gov/
For animals:	All	All		Requirements flow down to subrecipients.

Description	Type of Award	Type of Recipient	Specific Situation	Flow Down Requirements
Rules on animal acquisition, transport, care, handling, and use in: (i) 9 CFR Parts 1-4, Department of Agriculture rules that implement the Laboratory Animal Welfare Act of 1966 (7 US+A160C. 2131-2156). Public Health Service Agencies must follow requirements in the PHS Policy on Humane Care and Use of Laboratory Animals, which implements PL 99-158, Sec. 495. NASA requirements for animal welfare are set forth at 14 CFR Part 1232 EPA at 40 CFR Part 40. For USDA/CSREES, "In the case of domestic farm animals housed under farm conditions, the institution should adhere to the principles stated in the Guide for the Care and Use of Agricultural Animals in Agriculture and Teaching, Federation of Animal Science Societies, 1999."	All	All	Research, experimentation, or testing involving the use of animals USDA regulations exempt birds, most rats and mice bred for research, and farm animals used for agricultural research.	
Rules of the Departments of Interior (50 CFR Parts 10-24) and Commerce (50 CFR Parts 217-227) implementing laws and conventions on the taking, possession, transport, purchase, sale, export, or import of wildlife and plants, including the: Endangered Species Act of 1973 (16 U.S.C. 1531-1543); Marine Mammal Protection Act (16 U.S.C. 1361-1384); Lacey Act (18 U.S.C. 42); and Convention on International Trade in Endangered Species of Wild Fauna and Flora.	All	All	Activities which may involve or impact wildlife and plants.	
ENVIRONMENTAL STANDARDS				
Comply with applicable provisions of the Clean Air Act (42 U.S.C. 7401, et. Seq.) and Clean Water Act (33 U.S.C. 1251, et. seq.), as implemented by Executive Order 11738 [3 CFR, 1971-1975 Comp., p. 799]. EPA at 40 CFR Part 6	All	All	All, for Clean Air Act, Clean Water Act, and Executive Order 11738.	Requirements flow down to subrecipients.

Description	Type of Award	Type of Recipient	Specific Situation	Flow Down Requirements
<p>The quality of the human environment, and provide help the agency may need to comply with the National Environmental Policy Act (NEPA, at 42 U.S.C. 4321, et. seq.) and to prepare Environmental Impact Statements or other required environmental documentation. In such cases, the recipient agrees to take no action that will have an adverse environmental impact (e.g., physical disturbance of a site such as breaking of ground) until the agency provides written notification of compliance with the environmental impact analysis process.</p> <p>DOE at 10 CFR Part 1021</p>				
<p>Flood-prone areas, and provide help the agency may need to comply with the National Flood Insurance Act of 1968 and Flood Disaster Protection Act of 1973 (42 U.S.C. 4001, et. seq.), which require flood insurance, when available, for Federally assisted construction or acquisition in flood-prone areas.</p> <p>DOE at 10 CFR Part 1022</p>	All	All	Awards involving construction, land acquisition or development, with some exceptions [see 42 U.S.C. 4001, et. seq.].	The Council on Environmental Quality's regulations for implementing NEPA are at 40 C.F.R. Parts 1500-1508. Executive Order 11514 [3 CFR, 1966-1970 Comp., p. 902], as amended by Executive Order 11991, sets policies and procedures for considering actions in the U.S. Executive Orders 11988 [3 CFR, 1977 Comp., p. 117] and 11990 [3 CFR, 1977 Comp., p. 121] specify additional considerations, when actions involve floodplains or wetlands, respectively.
<p>All existing or proposed components of the National Wild and Scenic Rivers system, and provide help the agency may need to comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. 1271, et seq.).</p> <p>EPA at 40 CFR Part 6</p>	Grants, cooperative agreements, and other "financial assistance" (see 16 U.S.C. 3502).	All	Awards that may affect existing or proposed element of National Wild and Scenic Rivers system.	Requirements flow to subrecipients.
<p>Underground sources of drinking water in areas that have an aquifer that is the sole or principal drinking water source, and provide help the agency may need to comply with the Safe Drinking Water Act (42 U.S.C. 300h-3).</p> <p>EPA at 40 CFR Part 6</p>	All	All	Construction in All area with aquifer that the EPA finds would create public health hazard, if contaminated.	42 U.S.C. 300h-3(e) precludes awards of Federal financial assistance for all projects that the EPA administrator determines may contaminate a sole-source aquifer so as to threaten public health.

Description	Type of Award	Type of Recipient	Specific Situation	Flow Down Requirements
Resource Conservation and Recovery Act 42 USC 6901	All	Awards to states or a political subdivision of a state (which for this purpose includes state and local institutions of higher education or hospitals)		
HEALTH & SAFETY GUIDELINES				
Applicable OSHA Standards in Laboratories 29 CFR 1910.1030 Bloodborne Pathogens; 29 CFR 1910.1450, Occupational Exposure to Hazardous Chemicals in Laboratories	All	All	Research involving use of hazardous chemicals or bloodborne pathogens	
Handling and transport of etiologic agents Procedures for Domestic Handling and Transport of Diagnostic Specimens and Etiologic Agents, 1994 (3rd ed.), H5a3doc.75, National Committee for Clinical Laboratory Standards	All	All	Research involving etiologic agents	
Hotel and Motel Fire Safety Act of 1990 - P.L. 101-39 40 USC 327-333	Conference or meeting support	All	Alterations and Renovations > \$500,000	
Labor Standards under Federally Assisted Construction: Construction Work Hours and Safety Standards Act 40 USC 327-333	All	All	Alterations and Renovations > \$500,000	
Text Messaging While Driving - EO 13513	All	All	When performing work for or on behalf of government	Adopt and enforce policies that ban text messaging while driving.
Increasing Seat Belt Use in the United States Executive Order 13043, Increasing Seat Belt Use in the United States, dated, April 16, 1997	All	All		In accordance with the Executive Order, "grantees are encouraged to adopt and enforce on-the-job seat belt policies and programs for their employees when operating company-owned, rented, or personally owned vehicles."
NATIONAL SECURITY GUIDELINES				
Executive Order 13224, Blocking Property and Prohibiting Transactions with Persons who Commit, Threaten to Commit, or Support Terrorism, dated September 23, 2001.	All			
GENERAL/MISCELLANEOUS REQUIREMENTS				

Drug Free Workplace 41 USC 701 et seq. DOE at 10 CFR Part 607	All	All		
Civil False Claims Act 31 USC 2739	All	All	All	
Criminal False Claims Act 18 USC 287 and 1001 31 USC 3801, 45 CFR 79	All	All	All	
Government-wide Debarment and Suspension (Nonprocurement) DOE at 10 CFR 1036	All	All		
Lobbying Prohibitions 31 USC 1352, stipulates that (1) No Federal appropriated funds have been paid or will be paid, any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement. (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit the SF Form LLL, "Disclosure of Lobbying Activities", in accordance with its instructions. DOE at 10 CFR Part 601	All			Requirements flow down to construction subrecipients.
Metric System 15 USC 205 and Executive Order 12770	All	All	All	
Misconduct in Science Policies and responsibilities associated with prevention, detection, and handling of misconduct in science allegations as stipulated in regulations: DOE at 10 CFR Part 733 [Federal Register: December 6, 2000 (Volume 65, Number 235)] [Notices] [Page 76260-76264]	All	All	All	

<p>National Historic Preservation</p> <p>The recipient agrees to identify to the awarding agency all property listed or eligible for listing on the National Register of Historic Places that will be affected by this award, and to provide all the help the awarding agency may need, with respect to the award.</p> <p>16 USC 470f</p>	All	All	All	
<p>Paperwork Reduction Act</p> <p>44 USC 3501</p>	All	All	<p>When data is collected from respondents using a questionnaire or other survey instrument. See, however, M-11-07 dated 12/9/10 entitled, "Facilitating Scientific Research by Streamlining the Paperwork Reduction Act Process."</p> <p>https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/memoranda/2011/m11-07.pdf</p>	<p>Data collection activities, if any, performed under this project are the responsibility of the recipient, and awarding agency support of the project does not constitute approval of any survey design, questionnaire content, or data collection procedures. The recipient shall not represent to respondents that such data are being collected for or in association with Bonneville without the specific written approval of the Bonneville CO. However, this requirement is not intended to preclude mention of Bonneville support of the project in response to an inquiry or acknowledgment of such support in any publication of these data.</p>
<p>U.S. Flag Air Carriers</p> <p>49 USC 40118 See also General Services Administration amendment to the Federal Travel Regulations, Federal Register (Vol. 63, No. 219, 63417-63421)</p>	All	All	<p>Any air transportation to, from, between, or within a country other than the U.S. of persons or property, the expense of which will be assisted by Federal funding, must be performed by or under a code-sharing arrangement with a U.S.-flag air carrier if service provided by such a carrier is available (see Comp Gen. Decision B-240956, dated September 25, 1991).</p>	

Trafficking in Persons By signing or accepting funds under the agreement, the recipient agrees that it will comply with Trafficking Victims Protection Act of 2000 (22 U.S.C. 7104(g)) as implemented by 2 CFR 175.	All	175.15(b)l.a. applies to private entities 175.15(b)l.b. applies to other than private entities if award includes subrecipient award to a private entity 117.15(b)l.c. applies to all recipients		Requirements flow down to subrecipients.
Whistleblower Protection Awardees are notified of the applicability of 41 U.S.C. § 4712, as amended by P.L. 112-239, providing protection for whistleblowers.	All	All	All	
Use of United States Flag Vessels 46 CFR 381	All	All		
Patents, Trademarks and Copyrights 35 USC 202-204 and 37 CFR 401	All	Awards to non-profits and small businesses		
Privacy Act 5 USC 552a	All	All		
Pro Children Act 20 USC 7183	All	All	All awards performed in facilities where children are served.	
Uniform Relocation Assistance and Real Property Acquisition Policies Act 42 USC 4601 and 49 CFR 24	All	All		
Constitution Day PL 108-447	All	Educational Institutions		
Copeland Act 40 USC 4135	All	All		
Davis Bacon Act 40 USC 3141 et.seq	All	All		
Earthquake Hazards Reduction Act 42 USC 7701 et seq., EO 12699	All	All	Construction awards within applicable geographic areas	
Freedom of Information Act 5 USC 552	All	All		
Hatch Act 5 USC 7321-7328	All	State or Local Governments		
Limited English Proficiency EO 13166	All	All		

Native American Graves Protection and Repatriation 25 USC 3001-3013	All	All		Precludes use of funds to maintain or establish a computer network unless such network blocks the viewing, downloading, and exchanging of pornography, unless the activity fits within a law enforcement exception as noted in the provision.
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UNIT 3 – PROJECT DESCRIPTION

PART A – GENERAL

A.1 Authority

Pacific Northwest Electric Power Planning and Conservation Act Sections 6(a)(1)(A), 6(b)(1), and 6(k).

A.2 Grant Purpose

To provide funds to the grant Recipient (Recipient), in areas served by Bonneville Power Administration (BPA) Utility Customers (BPA Customer), to increase energy efficiency of dwellings owned or occupied by Eligible Participants (EP).

To supplement funds provided to Northwest Federally Recognized American Indian Tribes (Indian Tribes) from the United States Department of Energy (US DOE) Weatherization Assistance Program (WAP) for Low-income Persons (CFR Title 10 Part 440) and/or fund the completion of deemed energy efficiency measures as outlined in Unit 4 – Additional Program Specifications.

A.3 Background

BPA is committed to providing an adequate, efficient, economical and reliable power supply to the Northwest. To this end, BPA supports conservation efforts for residential, commercial, industrial and agricultural sectors. Conservation in the residential sector includes weatherization, HVAC, water heating, and other energy efficiency projects achieved through BPA Utility Customers, Northwest states (States), and Federally Recognized American Indian Tribes (Indian Tribes). BPA has been implementing energy efficiency programs throughout the Northwest since 1996. BPA's State and Tribal funding is focused on serving residences occupied by income qualified residents to improve access to high-cost energy efficiency projects.

BPA works with Indian Tribes to supplement existing federal and local funding sources. This BPA grant takes advantage of efficiencies of existing United States Department of Energy (US DOE) Weatherization Assistance Programs (WAP) while establishing some flexibilities of its own to improve implementation. BPA also offers a suite of available energy efficiency deemed (or stand-alone) measures to allow for more implementation flexibility.

Other federal, state, and local income qualified funding opportunities including from US DOE (Department of Energy) and LIHEAP (Low Income Home Energy Assistance Program) may fluctuate from year to year. To assure continued participation of income qualified households in energy efficiency programs, BPA will make every effort to continue to award grants to Northwest Federally Recognized American Indian Tribes (Indian Tribes) with consistent funding levels established every BPA rate period. BPA expects to distribute grant funds to Indian Tribes to be used in conjunction with their existing US DOE programs.

A.4 Location

Eligible Dwelling Units funded under this grant must be located in the utility service territory of a BPA Utility Customer (see Unit 5 – Bonneville Power Eligible Utility Customers).

A.5 Government-Furnished Property or Services

BPA will not provide property or services.

A.6 Cost Sharing/Voluntary Cost Sharing/Leveraging

There is no cost share requirement.

A.7 Recipient-Furnished Property or Services

The Recipient will provide all property and services in support of this grant.

A.8 Definitions

- "Applicant" means an entity that files a written application for financial assistance with BPA or with a recipient, i.e., for a subaward.
- "Application" means a written document from an applicant that contains details of the project or program for which they are seeking BPA's financial assistance and support.
- "Authorized Expenditure" means permitted uses of the funds provided to the Recipient under this grant.
- "Award" means the written instrument executed by a BPA Contracting Officer (CO) after an application is approved, which contains the terms and conditions for providing financial assistance to the recipient. Award can refer to any of the specific instruments referred to in the BFAI. An award authorizes funds for a specific project.
- "BFAI" means Bonneville Financial Assistance Instructions.
- "Bonneville Power Administration (BPA)" is a nonprofit federal power marketing administration based in the Northwest. Although part of the U.S. Department of Energy, BPA is self-funding and covers its costs by selling its products and services. BPA markets wholesale electrical power from 31 federal hydroelectric projects in the Northwest, one nonfederal nuclear plant, and several small, non-federal power plants. BPA also operates and maintains about three-fourths of the high-voltage transmission in its service territory.
- "BPA Utility Customer (BPA Customer)" means a cooperative or publicly owned electric utility which purchases firm or surplus firm power from Bonneville Power Administration (BPA). See Unit 5 – Bonneville Power Eligible Utility Customers.
- "Contract" means a legal instrument reflecting an agreement between BPA and a contractor whenever the principal purpose of the instrument is the acquisition by purchase or lease of goods or services for the direct use or benefit of BPA.
- Community Action Agencies (CAAs) refer to are local private and public non-profit organizations that carry out the Community Action Program (CAP), which was founded by the 1964 Economic Opportunity Act. They promote support individuals and families striving to become economically secure while investing in the future of their local communities through supporting a wide range of public services.
- "Contracting Officer (CO)" is a the BPA staff responsible for ensuring performance of all necessary actions for effective contracting, ensuring compliance with the terms of the contract, and safeguarding the interests of the United States in its contractual relationships. (48 CFR – 1.602-2)
- "Contracting Officer Representative (COR)" is the BPA staff responsible for monitoring the Recipient's progress in fulfilling the technical requirements specified in the Award. Should the Recipient fail to fulfill the contractual requirements, the COR must inform the CO of such failure. The COR maintains administration records, approves invoices and performs quarterly monitoring reports to confirm the Recipient is meeting the terms and conditions under the Award.
- "Cooperative agreement" means a legal instrument reflecting a relationship between BPA and a tribal, state, or local government, or other recipient whenever:
 - (1) the principal purpose of the relationship is the transfer of money, property, services, or anything of value to the State, local government, tribe or other recipient to accomplish a public purpose of support or stimulation authorized by Federal statute, rather than acquisition, by purchase, lease, or barter, of property or services for the direct benefit or use of BPA; and,

- (2) substantial involvement is anticipated between BPA and the State, local government, tribe or other recipient during performance of the activity. (31 U.S.C. 6305)
- "Deemed Energy Efficiency Measures (Deemed Measures)" refers to types of projects that can be installed independent of the DOE Savings-to-Investment Ratio (SIR) calculation but must satisfy applicable pre-condition and efficiency standards to qualify.
- "Eligible Dwelling Unit (EDU)" is defined in section Unit 3, B.2, part a.
- "Eligible Participant (EP)" is defined in section Unit 3, B.2, part b.
- "ENERGY STAR" is the registered name for a joint national energy efficiency program of the U.S. Environmental Protection Agency and the U.S. Department of Energy.
- "Financial assistance" means any form of assistance instrument where the principal purpose of the relationship is the transfer of money, property, services or anything of value to a recipient in order to accomplish a public purpose of support or stimulation authorized by Federal statute rather than of acquisition, by purchase, lease, or barter, of property or services for the direct benefit or use of BPA. Specific types of financial assistance instruments include, but are not limited to, grants, cooperative agreements, and loans.
- "Fiscal Year (FY)" for BPA means the fiscal period beginning October 1 and ending September 30.
- "Government" means a State or local government or a federally recognized Indian Tribal Government.
- "Grant" means a legal instrument reflecting a relationship between BPA and a tribal, state, or local government or other recipient whenever:
 - (1) the principal purpose of the relationship is the transfer of money, property, services, or anything of value to the State, local government, tribe or other recipient in order to accomplish a public purpose of support or stimulation authorized by Federal statute, rather than acquisition, by purchase, lease, or barter, of property or services for the direct benefit or use of BPA; and,
 - (2) no substantial involvement is anticipated between BPA and the State, local government, tribe or other recipient during performance of the contemplated activity. (31 U.S.C. 6304.)
- "Grantee." See "Recipient".
- "HVAC (Heating, Ventilation, and Air Conditioning)" means the different technology and systems used for moving air between indoor and outdoor areas to provide heating and cooling.
- "Implementation Manual (IM)" refers to the BPA manual that specifies which measures BPA Customers can implement with BPA funds and the requirements for implementation, reporting, payment amounts, and oversight and evaluation of energy savings. This manual may receive updates every six to 12 months.
- "Local government" means a county, municipality, city, town, township, local public authority, school district, special district, intrastate district, council of government (whether or not incorporated as a nonprofit corporation under state law), any other regional or interstate government entity, or any agency or instrumentality of a local government.
- "Local Service Providers (LSP)" means providers of services directly to Eligible Participants and may include both Sub-Grantees, or sub-contracting agencies and other non-profits often referred to as Community Action Partnerships (CAPs) or Community Action Agencies (CAAs).
- "Negotiation" means the process through which BPA and the applicant establish mutual agreement as to project purpose, definition, timing, BPA's role in the project, and the resources appropriate to support and carry out the project.
- "Northwest" means:
 - (1) the region consisting of the States of Oregon and Washington, the State of Montana west of the Continental Divide, and such portions of the States of Nevada, Utah, and Wyoming within the Columbia drainage basin and of the State of Idaho as the Secretary may determine to be within the marketing area of the Federal Columbia River power system, and

- (2) any contiguous areas, not more than seventy-five airline miles from said region, which are a part of the service area of a rural electric cooperative served by the Administrator on Dec. 5, 1980 which has a distribution system from which it serves both within and without said region.
- "NFRC" or "National Fenestration Rating Council" is a nonprofit organization that establishes objective window, door and skylight energy-performance ratings to help consumers compare products and make informed purchase decisions in multiple ways.
- "Participant" means a non-Federal party which receives financial assistance by means of a cooperative agreement. At BPA, the term "Recipient" is used in lieu of "participant."
- "Performance Period" is the total estimated time interval between the start of an initial award and the planned end date.
- "Personal Identifiable Information (PII)" means "Any information collected or maintained by the Department about an individual, including but not limited to, education, financial transactions, medical history and criminal or employment history, and information that can be used to distinguish or trace an individual's identity, such as his/her name, Social Security number, date and place of birth, mother's maiden name, biometric data, and including any other personal information that is linked or linkable to a specific individual." (Definition from DOE Order 206.1, Department of Energy Privacy Program)
- "Qualified Products List (QPL)" is a list of products, including equipment and appliances, that meet a specification for qualification.
- "Rate Period" means a period of time during which a specific set of rates established by BPA pursuant to a rate-case process are in effect (consistently two fiscal years with the exception of FY2026 – FY2028).
- "Recipient" means the organization that receives a financial assistance award from BPA and is financially accountable for the use of any BPA funds or property provided for the performance of the project and is legally responsible for carrying out the terms and conditions of the award.
- "Savings-to-Investment Ratio (SIR)" is a calculation to determine if the savings generated by the energy efficiency project compared to the cost of the project is cost effective and will pay for itself in savings. SIR is calculated by dividing the sum of a project's discounted savings by its investment costs. For a project to be cost effective, weatherization programs generally require the SIR to be greater than 1. Other US DOE-approved methods for determining measure installation criteria can be accepted. See Unit 4 – Part A for more information on how this grant will fund projects with SIR calculations.
- "State" means any of the several States of the United States, the District of Columbia, the Commonwealth of Puerto Rico, any territory or possession of the United States, or any agency or instrumentality of a State exclusive of local governments.
- "Sub-Grantee" means an entity managing an energy efficiency project which receives grant funding from the Recipient. The terms "Recipient" and "Sub-recipient" are more commonly used by BPA.

PART B – PROGRAM

B.1 General Requirements

Recipient shall coordinate funding projects in Eligible Dwelling Units (EDU) for Eligible Participants (EP). There are two types of projects that are funded:

- a. Weatherization Assistance for Low-Income Persons (10 CFR 440) (See Unit 4 – Part A)
- b. BPA Deemed Energy Efficiency Measures (Deemed Measures) (See Unit 4 – Part C through G)

B.2 Eligibility Requirements

The following eligibility requirements apply to this grant. BPA does not require that Personal Identifiable Information (PII) is collected or submitted to BPA for review to verify eligibility of the dwelling unit or income eligibility of the EP.

a. Eligible Dwelling Unit (EDU)

Eligible Dwelling Units must receive electric service from a BPA Utility Customer (see Unit 5 – Bonneville Power Eligible Utility Customers) and otherwise be defined by the US DOE Weatherization Assistance Program for Low-income Persons, 10 CFR 440.22.

All eligible dwelling units may receive BPA services regardless of any US DOE requirements which would restrict services due to the age of the residence or the length of time that had passed since it received prior energy efficiency services.

If completing deemed measures, additional requirements may be considered regarding the dwelling's primary heat source as outlined in this grant and the BPA Implementation Manual (IM). For more information, see Part F – Deemed Energy Efficiency Income Qualified Measures.

b. Eligible Participant (EP)

The Recipient shall establish income eligibility policies consistent with the Indian Tribe's existing policy or that of other federal or state agency funding programs, including, but not limited to, LIHEAP, HUD, NAHASDA, Section 8, Supplemental Social Security, TANF, and the DOE Weatherization Assistance Program (WAP). Some of these policies vary by state. The Indian Tribe may follow the policies of any state eligible for the BPA program, which includes WA, OR, ID, MT, WY, NV, and CA. This policy shall be made easily accessible to the public.

- i. The Recipient (Indian Tribe) may determine and set new income eligibility policies at their discretion. Any new income eligibility policies must be provided to BPA for review and approval prior to beginning the work to income qualify residents. Please allow at least 30 days for BPA to review and respond to if the proposed policy is approved prior income qualifying EPs.
- ii. Recipient can accept income documentation from a "verifiable source" or from a signed self-attestation of income to verify the participant's eligibility.
 - a. "Verifiable" refers to any documentation that can be verified by another source, which may include but is not limited to a pay stub, copies of IRS form 1040, Section 8 eligibility, certification by a Community Action Agency (CAA), certification by a Low Income Home Energy Assistance Program (LIHEAP) administrator, United States of Housing and Urban Development (HUD) eligibility, proof of current assistance from a state health and human services agency, current Temporary Assistance for Needy Families (TANF) benefits, or Supplemental Security Income (SSI).
 - b. Self-attestation of income must be signed by the EP. EP must self-attest that they meet income qualification levels as outlined by the Federal Weatherization Assistance Program (WAP), approved statewide guidelines, or Indian Tribal eligibility guidelines. Recipient or Sub-recipient may request templates from BPA to implement this option.
- iii. Provision for income-qualifying eligible participants in multifamily buildings and complexes:
 - a. Individual multifamily units can income-qualify and receive services even if the entire building is not being assessed for income qualification. To income qualify the entire multifamily building or complex, fifty percent (50%) or more of the households must income-qualify. Recipients may set more stringent requirements at their discretion. For example:
 - Two-, three-, and four-unit dwellings: A minimum of fifty percent (50%) of households can be one household in a two-unit dwelling, two households in a three-unit dwelling, or two households in a four-unit dwelling.
 - Five or more units: A minimum of fifty percent (50%) of households.

B.3 Operating Procedures

- a. The Recipient shall require its Subrecipients and any other Local Service Providers to follow specifications and procedures required in the US DOE Weatherization Assistance Program, 10 CFR

440, for Eligible Dwelling Units receiving service under this program unless this Grant requires a different specification and/or procedure as outlined in Unit 4 – Additional Program Specifications.

- b. For projects requiring a Savings-to-Investment Ratio (SIR) calculation, the Recipient shall establish policies and procedures to determine the cost effectiveness of measures for each Eligible Dwelling Unit using US DOE-approved computer audit tools. For Deemed Measures, the Recipient shall make every effort to meet pre-qualification and efficiency standards set in the BPA Implementation Manual (IM).
- c. The Recipient shall make all reasonable efforts to coordinate program activities funded under this grant with BPA Utility Customers and with partner neighboring tribal governments where their customers and members may be Eligible Participants.
- d. As part of the implementation of this grant, the BPA COR will make every effort to provide a 6-month advanced notice to the Recipient of any potential changes to this grant that result from changes to the BPA Implementation Manual (IM) or other guidance. The BPA COR will coordinate with the CO to implement grant modifications as necessary in a timely manner.

B.4 Funding

Allowances		
Administrative Costs	Costs shall not exceed 15% per grant operations budget	See below in this section B.4
Training & Technical Assistance	Costs shall not exceed 15% per grant operations budget	See below in this section B.4
Health & Safety Repairs	Costs shall not exceed 30% per grant operations budget	See Unit 4 – Part A for more details
Weatherization-Related Repairs	Costs shall not exceed 30% per grant operations budget	See Unit 4 – Part A for more details
Energy Efficiency Income Qualified Education	Up to 20% of the grant operations budget available with written consent	See Unit 4 – Part B for more details
Federally Negotiated Indirect Rate for Tribal Grants	Covered 100%	See below in this section B.4

a. Authorized Expenditures

All funding is restricted to authorized expenditures as defined in 10 CFR 440 for the implementation of Low-Income Weatherization related activities, except as specifically authorized in this Grant. Recipient agrees to incur all authorized expenditures within the negotiated performance period. These include:

- i. Grants awarded under this program are subject to BFAI Part 5 – Cost Principles, found in the [Bonneville Financial Assistance Instructions \(BFAI\) manual](#) starting on page 57.
- ii. The cost of all cost effective measures that meet the “Savings-to-investment ratio” (SIR) calculation of equal or greater than 1.0. SIR or some other US DOE-approved method for determining measure installation criteria only applies where an SIR is explicitly calculated. When calculating SIR, the utilization of actual utility rates, or EIA (Energy Information Administration) average utility rates are permitted. The SIR cost effectiveness test is describes in 10 CFR 440.
- iii. Costs of installing “Deemed” measures as defined in this grant in Unit 4 – Parts F – G. Deemed measures are not required to pass the SIR cost effective test as described in 10 CFR 440.
- iv. Total administrative costs for the Recipient and Subrecipient shall not exceed fifteen percent (15%) per program operations budget. Administrative costs shall be allocated according to the

Indian Tribe's procedures.

- v. Training and Technical assistance costs shall not exceed fifteen percent (15%) per program operations budget, which includes the cost of travel and reasonably priced lodging based on lodging comparison in the area. See [GSA per diem lodging rates](#) for a reasonable comparison.
 - vi. Health and safety repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget. See Unit 4 – Part A for more details.
 - vii. Weatherization-related repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget. See Unit 4 – Part A for more details.
 - viii. Federally Negotiated Indirect Rate for Federal Grants will be covered 100% for applicable costs. If including federal indirect rates with applicable costs, submit a current agreement to BPA with initial application.
 - ix. Purchases of project-related equipment, including duct blasters and blower doors, may be approved by the CO and COR with prior written request and approval.
 - x. Purchase of service vehicles is not an authorized expenditure under this grant.
 - xi. Costs associated with projects funded through the DOE Weatherization Readiness Fund (WRF) are only allowable if they are associated and related to an eligible energy efficiency project.
- b. Funds from a BPA Utility Customer, which were derived from BPA either from credits, power purchase contracts, Direct Funding Demonstration, or as Administrative support, shall not be used in combination with funds from the BPA Energy Efficiency Income Qualified Grant on individual measures, but may be co-mingled with any funds within a single Eligible Dwelling Unit receiving energy efficiency measures.
 - c. BPA will not restrict the amount of funds to any residence otherwise eligible for energy efficiency measures or other services as long as work completed follows the terms of this Grant.
 - d. All Eligible Dwelling Units may receive all other measures and services available in this Grant.
 - e. Financial assistance provided under this Grant will be used to supplement, and not supplant, State or local funds, and, to the maximum extent practicable as determined by BPA, to increase the amounts of these funds that would be made available in the absence of Federal or BPA funding.

B.5 Reallocating Allowances between Funding Categories

If Recipient has a business need to shift allowances between budget categories, Recipient shall contact the COR and include the CO. No contract modifications are needed.

B.6 Funding Benchmarks Within the Grant Performance Period

- a. Recipient shall submit an End-Of-Year expenditure estimate by email to the BPA COR by July 31, unless there is cause to request an estimate earlier.
- b. If Recipient's expenditure estimates are less than the target expenditures for that fiscal year, Recipient must email the COR a brief summary of challenges to spending the allocated budget and an estimate of the budget amount that can be deobligated to be used by other BPA programs and by when.

B.7 Environmental – Indoor Air Quality

The Recipient shall maintain air quality in weatherized homes by conforming to the DOE WAP standards, and/or the American Society of Heating Refrigeration and Air-Condition Engineers (ASHRAE) standards or to applicable state or local code, whichever achieves the highest level of required ventilation.

When providing only energy education and/or deemed measure services, ASHRAE 62.2 Ventilation Standards are optional. However, any required moisture or mold assessment as defined in each Indian Tribe's individual contract should be honored. If any moisture related air quality issues are found, ASHRAE 62.2 Ventilation Standards should be followed.

If levels of radon are tested and determined to be higher than the recommended levels established by the United States Environmental Protection Agency (EPA), radon mitigation costs are allowable but must be included and limited to the allowable limit of health and safety costs.

B.8 Federal Stewardship

BPA will exercise Federal stewardship in overseeing the work performed under this Award. Stewardship activities may include but are not limited to: conducting site visits, reviewing performance and financial reports, providing technical assistance and/or temporary intervention in unusual circumstances to correct deficiencies which develop during the project, assuring compliance with terms and conditions, and reviewing technical performance after project completion to ensure that the award objectives have been accomplished. BPA may also rely upon the US Department of Energy (DOE) oversight of the State Weatherization Program.

B.9 Invoicing and Reporting

The Recipient shall submit regular invoicing and reports of program activity. The BPA COR will specify the reporting template, invoice template, and the naming convention for reports and invoices.

This grant is not assigned FAIN, CDFA, or ALN numbers and is not subject to the FFATA federal reporting requirements.

The Recipient shall provide the following:

a. Invoicing.

- i. Recipients are required to submit invoices for reimbursement for completed work no less than every six (6) months within the performance period. BPA prefers but does not require a more frequent quarterly or monthly invoicing cadence, which is at the discretion of the Recipient.
- ii. Recommended invoice template is the SF-270: Request for Advance or Reimbursement (OMB 0348-0004). Alternative invoice templates shall be accepted by the BPA COR with approval.

b. Quarterly Activity Report as Available.

- i. Report to BPA all programs and projects eligible under this Grant that were completed within the previous quarter using a template provided by the BPA COR.
- ii. All reports shall identify the BPA Utility Customer serving the Eligible Dwelling Unit.
- iii. Reports are due no later than 45 days from the end of each quarter.
- iv. The BPA COR can negotiate the cadence and path for submitting the report as needed.

c. Monthly Accrual Estimates. Recipient shall submit monthly accrual estimates to the BPA COR for all spending within the identified month that will not yet be claimed on an invoice by the end of the month. BPA will establish deadlines for submissions.

d. Ad-hoc Reports. The Recipient shall provide ad-hoc reports as requested by the COR with information on program activity and feedback from program implementers.

B.10 Grant Expiration

Upon grant expiration at the end of the performance period or at the request of the COR, the Recipient shall submit the following information to support an efficient Close-Out Process:

- a. **Final Accrual.** The Recipient shall submit the final budget accrual estimate to the BPA COR for all spending within the final month of the performance period that has not yet been claimed on an invoice by the end of the month.
- b. **Final Invoice.** The Recipient shall submit the final invoice within 90 days of the end of the performance period. If the Recipient has the need to submit additional funding requests following its final invoice, the Recipient may submit additional funding requests with an explanation of the delay. It is at the discretion of the BPA CO and COR if those funds may be honored after the grant expiration.

- c. **Final Activity Report.** The Recipient shall submit the final activity report within 90 days of the end of the performance period using the template provided by BPA.
- d. **Final Financial Expenditure Report.**
 - i. The Recipient shall submit the final financial expenditure report within 90 days of the end of the performance period using the template provided by BPA.
 - ii. It will detail total expenditures, funds requested, remaining budget, and budget expenditure progress by budget allocation category.
 - iii. Recommended financial expenditure report template is the Federal Financial Report (OMB 0348-0061). Alternative invoice templates shall be accepted by the BPA COR with approval.

UNIT 4 – ADDITIONAL PROGRAM SPECIFICATIONS

The following specifications and procedures are in addition to those already noted in the Unit 3 – Project Description. The following programs constitute authorized expenditures under this grant.

PART A: Income Qualified Weatherization with Savings-to-Investment Ratio (SIR) Calculation

The specifications and procedures required in the US DOE Weatherization Assistance Program, 10 CFR Part 440, shall be adhered to for Eligible Dwelling Units treated under this program unless otherwise identified specifically within this Grant.

- 1. Health and safety repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget allowed. See the [Income Qualified Repair Cost Reference Table](#) Reference Table for some guidance on allowable repair costs.
- 2. Local Service Providers may create a separate BPA waiting list rather than require the Eligible Participant in BPA's service territory to remain on any other waiting list.
- 3. Eligible Dwellings Unit (EDU) may be weatherized regardless of if the Eligible Participant or Eligible Dwelling Unit received energy efficiency services in the past.
- 4. Weatherization-related repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget allowed. See the [Income Qualified Repair Cost Reference Table](#) Reference Table for some guidance on allowable repair costs.
- 5. Repair or replacement of electrical heaters or furnaces, if they are no longer working, or fail to heat the dwelling properly, is an authorized expenditure so long as they are replaced with qualifying efficient equipment. The repair or replacement of electric heaters or furnaces in Eligible Dwelling Unit must be accompanied by cost-effective energy efficiency measures to ensure maximum energy efficiency of the electricity used by the repaired or replaced heaters or furnaces.

PART B: Energy Efficiency Education

- 1. The Recipient may provide Energy Efficiency Education to clients consistent with the program approved by US DOE for this endeavor.
 - i. The Recipient can spend up to 20 percent of the funds available through this grant to pay for Energy Efficiency Education.
 - ii. The Recipient shall provide the Eligible Participants with written information which informs them that the program is funded by BPA.
 - iii. The Recipient shall obtain signed documentation from the head of household for each visit (should a visit occur) verifying that the education occurred.

PART C: Efficient Lighting

1. LEDs-Solid state lighting, also known as light emitting diodes (LED) bulbs, must be ENERGY STAR qualified or listed on the Lighting Design Lab (LDL) Qualified LED Lamp List as integral omnidirectional, directional or decorative.

PART D: Refrigerator Replacements

1. Energy Efficient Refrigerators (Refrigerators) are an authorized expenditure under this grant. This program shall be implemented consistently with the current DOE requirements for implementation of these same measures or any other protocol that is accepted by BPA.
2. Authorized expenditures for the cost of the replacement refrigerator are 100% of the refrigerator cost.

PART E: Replacement of Pre-1976 Manufactured Home with New Northwest Energy Efficiency Manufactured Housing (NEEM) Certified HOME

E.1 Requirements and Specifications

- a. A full audit of the house must be conducted, and calculated expenses to weatherize the house must meet or exceed \$7,500 (including any approved health and safety or repair expenses).
- b. Existing manufactured homes must have been built prior to 1976, be electrically heated, and be occupied as a residence. The existing pre-1976 home must be decommissioned and disposed of and cannot be used as a dwelling unit once the new NEEM home is sited.
- c. Replacement manufactured homes must be electrically heated, new, and certified by the Northwest Energy Efficient Manufactured Housing (NEEM) program as a New NEEM 1.1 or 2.0 Home.
- d. NEEM has an online tracking and certification system operated by Northwest Energy Works. Contact Northwest Energy Works (888) 370-3277, ext. 102 for current information.
- e. Subcontractors may replace Pre-1976 Manufactured Homes with a new NEEM Certified Home themselves, or through a third-party, but must retain responsibility for compliance with measure requirements.
- f. Customers must utilize the BPA Manufactured Home Replacement Documentation Form found in the [IM Document Library](#) to document the pre-and post-condition and related cost data for this measure.

E.2 Documentation Requirements

- a. End-user identifying information including unique site ID and address.
- b. NEEM 1.0 or 2.0 certificate of compliance.
- c. Completed BPA Manufactured Home Replacement Documentation Form found in the [IM Document Library](#), which documents project information that the original home was constructed prior to 1976 and that the original manufactured home was decommissioned.

E.3 Payment

- a. BPA will pay up to \$7,500 for replacement of a pre-1976 manufactured home with a new NEEM Certified Home on a per-replacement home basis.
- b. Customers may claim high efficiency heating and thermostat measures in addition to this measure, but may not claim BPA Grant measures that could be found within [the NEEM 1.1 or NEEM 2.0 specifications](#).

PART F: DEEMED ENERGY EFFICIENCY INCOME QUALIFIED MEASURES

All measures in this section can be installed independent of the DOE SIR Calculation. BPA does not require any pre- or post-audit to complete Deemed Measures, though the Recipient may set more stringent requirements at their discretion.

All existing housing types (single-family, manufactured and multifamily) are eligible although not all measures are applicable to each housing type. See the Income Qualified Deemed Measures Payment Table for available measures by housing type and payment information.

When a BPA-Qualified products list (QPL) applies to the measure, the technology must be on the BPA-Qualified products list to qualify for payment.

To verify eligible housing types, existing heating system types, efficiency requirements, and technical requirements, reference each of the relevant project section in the [BPA's Implementation Manual \(IM\)](#).

As part of the implementation of this grant, BPA COR will make every effort to provide a 6-month advanced notice to the Recipient of any potential changes to this grant that result from changes to the BPA Implementation Manual (IM). The BPA COR will coordinate with the CO to implement grant modifications as necessary in a timely manner.

F.1 Payment For Deemed Measures

- a. All deemed measures can be reimbursed dollar-for-dollar unless payment cost caps apply. See [Part G – Income Qualified Deemed Measures Payment Table](#) for details on payment cost caps.
- b. BPA allows customers to report costs directly attributable to the installation of the measure as eligible for dollar-for-dollar payment (except as noted in the Income Qualified Deemed Measures Payment Table, not to exceed 100 percent of the actual cost). This includes any cost incurred for meeting requirements and specifications (e.g., verification of income, attic and crawl space ventilation, removal of knob and tube wiring and underfloor moisture barriers).
- c. Customers may combine multiple funding sources within a residence but may not combine funding from multiple BPA sources for the same measure.
- d. Customers may also report costs related to repair work that is directly associated with the installation of the measure required for health and safety, or to ensure the efficacy of the measure (e.g., replace rotting wood in window frame, or repair a hole in the roof). Repair costs must be documented according to DOE WAP requirements and cannot exceed this grant's budget limits for related repair costs as outlined in [Part B – B.2 Funding](#). See [Part G – Income Qualified Deemed Measures Payment Table](#) for more information on eligible measures by housing type and payment cost caps.
- e. Health and safety repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget allowed. See the [Income Qualified Repair Cost Reference Table](#) Reference Table for some guidance on allowable repair costs.
- f. Weatherization-related repairs are an authorized expenditure. The cost shall not exceed thirty percent (30%) per program operations budget allowed. See the [Income Qualified Repair Cost Reference Table](#) Reference Table for some guidance on allowable repair costs.

F.2 Deemed Measures Allowed Under this Grant

- a. For the following deemed measures, reference the following sections in [BPA's Implementation Manual \(IM\)](#) for details on eligible home types, existing primary heating types, efficiency requirements, and technical installation guidance.

1. Clothes Washer Replacements

- i. See BPA Implementation Section [11.2](#)
- ii. ENERGY STAR-rated clothes washers may replace existing clothes washers if the existing clothes washer is not ENERGY STAR-rated.
- iii. All ENERGY STAR-rated clothes washers are deemed to be cost effective under this program.
- iv. The size and model of the appliance shall be standard, and reasonably priced. Clothes washer replacements must be supported by three quotes for the selected model.
- v. The maximum reimbursement is \$800.

2. Clothes Dryer Replacements

- i. See BPA Implementation Section [11.2](#)
- ii. Clothes dryers that are ENERGY STAR-rated or BPA Tiers 1 – 3. Clothes dryers may replace existing clothes washers if the existing clothes dryer is not ENERGY STAR-rated.
- iii. All ENERGY STAR-rated of BPA Tiers 1 – 3 clothes dryers are deemed to be cost effective under this program.
- iv. The size and model of the appliance shall be standard, and reasonably priced. Clothes dryer replacements must be supported by three quotes for the selected model.
- v. The maximum reimbursement is \$800.

3. Commercial HVAC Only for Multifamily Shared Common Areas

- i. Commercial Connected Thermostat: [8.4.2](#)
- ii. Commercial Ductless Heat Pump Retrofit and Upgrade: [8.4.3](#)
- iii. Air-Source Heat Pump Retrofit and Upgrade: [8.4.4](#)

4. Heat Pump Water Heaters

- i. Heat Pump Water Heaters – 40 Gallon: [11.4.2](#)
 - For more information on eligibility and installation specifications, reference IM Section [11.4.2](#) on the [BPA Residential Water Heating here](#).
 - Products must be on **BPA's Heat Pump Water Heater Qualified Products List** found in the [IM Document Library \(bpa.gov\)](#) or approved by the BPA Energy Efficiency Income Qualified grant manager.
- ii. Heat Pump Water Heaters – 50 Gallon of Above – Tiers 3 and 4: [11.4.3](#)
 - For more information on eligibility and installation specifications, reference IM Section [11.4.3](#) on the [BPA Residential Water Heating here](#).
 - Products must be on **BPA's Heat Pump Water Heater Qualified Products List** found in the [IM Document Library \(bpa.gov\)](#) or approved by the BPA Energy Efficiency Income Qualified grant manager.
- iii. Split-System Heat Pump Water Heaters: [11.4.4](#)
 - For more information on eligibility and installation specifications, reference IM Section [11.4.4](#) on the [BPA Residential Water Heating here](#).
 - Products must be on **BPA's Heat Pump Water Heater Qualified Products List** found in the [IM Document Library \(bpa.gov\)](#) or approved by the BPA Income Qualified grant manager.

5. HVAC

- i. Ductless and Ducted Mini-Split Heat Pumps Conversion: [11.5.1](#)
 - For information on home and efficiency eligibility and installation best practices, reference IM Section [11.5.1](#) or the [BPA Residential HVAC page here](#).
 - Existing homes conditioned by zonal or forced-air electric-resistance heat as the primary heating source. No other heating sources are eligible.
 - Equipment must be AHRI-rated with an HSPF2 that meets or exceeds federal minimum standards.

- iv. Ducted Air-Source Heat Pump Conversion to Air Source Heat Pump (non-Variable Speed): [11.5.2](#)
 - For information on home and efficiency eligibility and installation best practices, reference IM Section [11.5.2](#) or the [BPA Residential HVAC page here](#).
 - Equipment must be AHRI-rated with an HSPF2 and SEER2 that meets or exceeds federal minimum standards.
- v. Ducted Air-Source Heat Pump Conversion to Variable-Speed Air-Source Heat Pump: [11.5.3](#)
 - For information on home and efficiency eligibility and installation best practices, reference IM Section [11.5.3](#) or the [BPA Residential HVAC page here](#).
 - Equipment must be AHRI-rated with an HSPF2 and SEER2 that meets or exceeds federal minimum standards.
- vi. Ducted Variable-Speed Air-Source Heat Pump Upgrade: [11.5.4](#)
 - For information on home and efficiency eligibility and installation best practices, reference IM Section [11.5.4](#) or the [BPA Residential HVAC page here](#).
 - Equipment must be AHRI-rated with an HSPF2 and SEER2 that meets or exceeds federal minimum standards.
- vii. Centrally Ducted Air Conditioners: [11.5.5](#)
- viii. Packaged Terminal Heat Pump: [11.5.6](#)
- ix. Prescriptive Duct Sealing: [11.5.8](#)
 - Projects must either follow the BPA Residential Prescriptive Duct Sealing Specifications found in the [BPA IM Document Library](#) or the specifications and requirements established by the [DOE Weatherization Assistance Program \(WAP\) found here](#).
- x. Duct Insulation: [11.5.9](#)
- xi. Line Voltage Thermostat: [11.6.1](#)
- xii. Communicating Line Voltage Thermostat: [11.6.2](#)
- xiii. Contractor-Installed Smart Thermostat: [11.6.3](#)
 - Products must be on **listed on BPA's Smart Thermostat Qualified Products List** found in the [IM Document Library \(bpa.gov\)](#) or approved by the BPA Energy Efficiency Income Qualified grant manager.

6. Weatherization

All weatherization measures in single-family and manufactured homes must be installed according to the [DOE Weatherization Assistance Program \(WAP\) found here](#) or the BPA Residential Weatherization Specification & Best Practices Guide found in the [BPA IM Document Library](#). Refer to individual measures to confirm which are eligible for existing single-family, manufactured, and multifamily low-, mid-, and high-rise buildings.

- i. Insulation: [11.8.1](#)
 - Follow all pre-condition starting R-value and post-condition ending R-value to ensure eligibility.
 - Note that insulation products must be rated by material R-values to qualify. Products that potentially achieve an R-value based on assembled requirements, reflectivity and/or emissivity do not qualify.
- ii. Prime Windows and Patio Doors: [11.8.2](#)
 - Follow all pre-condition pane and frame type and post-condition NFRC U-value to ensure eligibility.
- iii. Low-E Storm Windows: [11.8.3](#)

- iv. Exterior insulated doors: [11.8.4](#)
- v. Whole house Air Sealing: [11.8.5](#)
- vi. Prescriptive Air Sealing: [11.8.6](#)
- vii. Door Sweeps: [11.8.7](#)

PART G: Deemed Income Qualified Measure Payment Table

All measures in this table can be installed independent of the SIR calculation. All measures are subject to the same technical and eligibility requirements as BPA's Non-Income Qualified Energy Efficiency Deemed Measures, as outlined in [BPA's Implementation Manual \(IM\)](#). This manual is updated every two-year rate period. Minor corrections are made every 6 months, and major updates are made every rate period.

HOME TYPE	INCOME QUALIFIED MEASURE: All Pre- and Post- Condition Requirements Apply	INSTALLED MEASURE COST PAYMENT	BPA IM SECTION: Reference for Eligibility Requirements	REPAIR COST PAYMENT: Dollar-for-Dollar Up to Grant Repair Cost Budget Cap
Single-Family	LED Lighting	Dollar-for-dollar	[See above]	Example includes: Minor electrical repairs
	Refrigerator Replacements	Dollar-for-dollar	[See above]	
	Attic Insulation	Dollar-for-dollar	11.8.1	Examples include: repair roof leak, rebuild external entrance covering and fix hole in siding
	Floor Insulation	Dollar-for-dollar	11.8.1	
	Wall Insulation	Dollar-for-dollar	11.8.1	
	Prime Window	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	Examples include: address dry rot in window framing, replace rotten threshold and repair cracked header
	Patio Door	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	
	Low-E Storm Window	Dollar-for-dollar, not to exceed \$10/sq ft	11.8.3	
	Exterior Insulated Door	Dollar-for-dollar, not to exceed \$700/door	11.8.4	
	Whole House Air Sealing	Dollar-for-dollar	11.8.5	Examples include: reframe attic access hatch and repair pull-down stairs
	Prescriptive Air Sealing	Dollar-for-dollar	11.8.6	
	Door Sweep	Dollar-for-dollar, not to exceed \$35	11.8.7	No repairs allowed for this measure
	Clothes Washer – ENERGY STAR Front Load or Top Load	Dollar-for-dollar, not to exceed \$800	11.2	No repairs allowed for this measure
	Clothes Dryer – ENERGY STAR or BPA Tiers 1 – 3	Dollar-for-dollar, not to exceed \$800	11.2	
	Ductless or Ducted Mini-Split Heat Pump(s) Conversion	Dollar-for-dollar, not to exceed \$6,000/DHP	11.5.1	Example includes: improve structural support for interior head
	Ducted Air Source Heat Pump Conversion to Air Source Heat Pump (non-Variable Speed)	Dollar-for-dollar, not to exceed \$9,000	11.5.2	Example includes: repair to damaged siding at connection point
	Ducted Air-Source Heat Pump Conversion to Variable-Speed Air-Source Heat Pump	Dollar-for-dollar, not to exceed \$9,000	11.5.3	

HOME TYPE	INCOME QUALIFIED MEASURE: All Pre- and Post- Condition Requirements Apply	INSTALLED MEASURE COST PAYMENT	BPA IM SECTION: Reference for Eligibility Requirements	REPAIR COST PAYMENT: Dollar-for-Dollar Up to Grant Repair Cost Budget Cap
	Ducted Variable-Speed Air-Source Heat Pump Upgrade	Dollar-for-dollar, not to exceed \$9,000	11.5.4	Example includes: repair to damaged siding at connection point
	Centrally Ducted Air Conditioners	Dollar-for-dollar, not to exceed \$3,800	11.5.5	Example includes: repair to damaged siding at connection point
	Prescriptive Duct Sealing	Dollar-for-dollar, not to exceed \$750	11.5.8	Examples include: replace rusted duct work and repair broken filter slot
	Duct Insulation	Dollar-for-dollar	11.5.9	Examples include: replace severely rusted, corroded, or disconnected ductwork
	Unitary Heat Pump Water Heater – 40 Gallon	Dollar-for-dollar, not to exceed \$2,800	11.4.2	Examples include: replacement of plumbing connections at water heater, relocating to ensure adequate ventilation
	Unitary Heat Pump Water Heater – 50 Gallon and Above – Tier 3	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Unitary Heat Pump Water Heater – 50 Gallon – Tier 4	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Split-System Heat Pump Water Heater	Dollar-for-dollar, not to exceed \$3,000	11.4.4	
	Line-Voltage Thermostat Installation	Dollar-for-dollar, not to exceed \$85	11.6.1	No repair costs allowed for this measure
	Communicating Line Voltage Thermostat	Dollar-for-dollar, not to exceed \$225	11.6.2	
	BPA Approved Contractor-Installed Advanced Smart Thermostat	Dollar-for-dollar, not to exceed \$400	11.6.3	
Multi-family Low-Rise	LED Lighting	Dollar-for-dollar	[See above]	Example includes: Minor electrical repairs
	Refrigerator Replacements	Dollar-for-dollar	[See above]	
	Attic Insulation	Dollar-for-dollar	11.8.1	Examples include: repair roof leak, rebuild external entrance covering and fix hole in siding
	Floor Insulation	Dollar-for-dollar	11.8.1	
	Wall Insulation	Dollar-for-dollar	11.8.1	
	Prime Window	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	Examples include: address dry rot in window framing, replace rotten threshold and repair cracked header
	Patio Door	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	
	Low-E Storm Window	Dollar-for-dollar, not to exceed \$10/sq ft	11.8.3	
	Exterior Insulated Door	Dollar-for-dollar, not to exceed \$700/door	11.8.4	

HOME TYPE	INCOME QUALIFIED MEASURE: All Pre- and Post- Condition Requirements Apply	INSTALLED MEASURE COST PAYMENT	BPA IM SECTION: Reference for Eligibility Requirements	REPAIR COST PAYMENT: Dollar-for-Dollar Up to Grant Repair Cost Budget Cap
	Door Sweep	Dollar-for-dollar, not to exceed \$35	11.8.7	No repair costs allowed for this measure
	Clothes Washer – ENERGY STAR in Common Areas	Dollar-for-dollar, not to exceed \$800	11.2	No repair costs allowed for this measure
	Clothes Dryer – ENERGY STAR or BPA Tiers 1 – 3	Dollar-for-dollar, not to exceed \$800	11.2	No repair costs allowed for this measure
	Unitary Heat Pump Water Heater – 40 Gallon Tank Size	Dollar-for-dollar, not to exceed \$2,800	11.4.2	Examples include: replacement of plumbing connections at water heater, relocating to ensure adequate ventilation
	Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Unitary Heat Pump Water Heater – 50 gallon and above – Tier 4	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Split-System Heat Pump Water Heater	Dollar-for-dollar, not to exceed \$3,000	11.4.4	
	Residential Packaged Terminal Heat Pump	Dollar-for-dollar, not to exceed \$1,600	11.5.6	Examples include: Improve structural support for interior unit or repair to damaged siding at connection point
	Line Voltage Thermostat	Dollar-for-dollar, not to exceed \$85	11.6.1	No repair costs allowed for these measures
	Communicating Line Voltage Thermostat	Dollar-for-dollar, not to exceed \$225	11.6.2	
	BPA Approved Contractor-Installed Advanced Smart Thermostat	Dollar-for-dollar, not to exceed \$400	11.6.3	
	Commercial Connected Thermostat (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$400	8.4.2	
	Commercial Ductless Heat Pump Retrofit and Upgrade (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$2,000/ ton	8.4.3	Example includes: Improve structural support for interior head
	Commercial Air-Source Heat Pump Retrofit and Upgrade (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$1,400/ ton	8.4.4	Example includes: Repair to damaged siding at connection point
Multifamily Mid/High-Rise	LED Lighting	Dollar-for-dollar	[See above]	Example includes: Minor electrical repairs
	Refrigerator Replacements	Dollar-for-dollar	[See above]	
	Attic Insulation	Dollar-for-dollar	11.8.1	Examples include: repair roof leak, rebuild external entrance covering and fix hole in siding
	Wall Insulation	Dollar-for-dollar	11.8.1	
	Prime Window	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	Examples include: address dry rot in window framing, replace rotten threshold and repair cracked header
	Patio Door	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	

HOME TYPE	INCOME QUALIFIED MEASURE: All Pre- and Post- Condition Requirements Apply	INSTALLED MEASURE COST PAYMENT	BPA IM SECTION: Reference for Eligibility Requirements	REPAIR COST PAYMENT: Dollar-for-Dollar Up to Grant Repair Cost Budget Cap
	Door Sweep	Dollar-for-dollar, not to exceed \$35	11.8.7	No repair costs allowed for this measure
	Clothes Washer – ENERGY STAR in Common Areas	Dollar-for-dollar, not to exceed \$800	11.2	No repair costs allowed for this measure
	Clothes Dryer – ENERGY STAR or BPA Tiers 1 – 3	Dollar-for-dollar, not to exceed \$800	11.2	
	Unitary Heat Pump Water Heater – 40 Gallon Tank Size	Dollar-for-dollar, not to exceed \$2,800	11.4.2	Examples include: Replacement of plumbing connections at water heater, relocating to ensure adequate ventilation
	Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Unitary Heat Pump Water Heater – 50 gallon and above – Tier 4	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Split-System Heat Pump Water Heater	Dollar-for-dollar, not to exceed \$3,000	11.4.4	
	Residential Packaged Terminal Heat Pump	Dollar-for-dollar, not to exceed \$1,600	11.5.6	Examples include: Improve structural support for interior unit or repair to damaged siding at connection point
	Line Voltage Thermostat Installation	Dollar-for-dollar, not to exceed \$85	11.6.1	No repair costs allowed for this measure
	Communicating Line Voltage Thermostat	Dollar-for-dollar, not to exceed \$225	11.6.2	
	BPA Approved Contractor-Installed Advanced Smart Thermostat	Dollar-for-dollar, not to exceed \$400	11.6.3	
	Commercial Connected Thermostat (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$400	8.4.2	No repair costs allowed for this measure
	Commercial Ductless Heat Pump Retrofit and Upgrade (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$2,000/ton	8.4.3	Example includes: Improve structural support for interior head
	Commercial Air-Source Heat Pump Retrofit and Upgrade (<i>Multifamily Shared Common Areas Only</i>)	Dollar-for-dollar, not to exceed \$1,400/ton	8.4.4	Example includes: Repair to damaged siding at connection point
Manufactured	LED Lighting	Dollar-for-dollar	[See above]	Example includes: Minor electrical repairs
	Refrigerator Replacements	Dollar-for-dollar	[See above]	
	Attic Insulation	Dollar-for-dollar	11.8.1	Examples include: repair roof leak, rebuild external entrance covering
	Floor Insulation	Dollar-for-dollar	11.8.1	
	Prime Window	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	Examples include: address dry rot in window framing, replace rotten threshold and repair cracked header
	Patio Door	Dollar-for-dollar, not to exceed \$45/sq ft	11.8.2	

HOME TYPE	INCOME QUALIFIED MEASURE: All Pre- and Post- Condition Requirements Apply	INSTALLED MEASURE COST PAYMENT	BPA IM SECTION: Reference for Eligibility Requirements	REPAIR COST PAYMENT: Dollar-for-Dollar Up to Grant Repair Cost Budget Cap
	Low-E Storm Window	Dollar-for-dollar, not to exceed \$10/sq ft	11.8.3	
	Exterior Insulated Door	Dollar-for-dollar, not to exceed \$700/door	11.8.4	
	Whole House Air Sealing	Dollar-for-dollar	11.8.5	
	Door Sweep	Dollar-for-dollar, not to exceed \$35	11.8.7	Example includes: install whole house ventilation fan
	Clothes Washer – ENERGY STAR Front Load or Top Load	Dollar-for-dollar, not to exceed \$800	11.2	No repair costs allowed for this measure
	Clothes Dryer – ENERGY STAR or BPA Tiers 1 – 3	Dollar-for-dollar, not to exceed \$800	11.2	
	Ductless or Ducted Mini-Split Heat Pump Conversion	Dollar-for-dollar, not to exceed \$6,000/DHP	11.5.1	Example includes: improve structural support for interior head
	Ducted Air Source Heat Pump Conversion to Air Source Heat Pump (Non-Variable Speed)	Dollar-for-dollar, not to exceed \$9,000	11.5.2	Example includes: repair to damaged siding at connection point
	Ducted Air-Source Heat Pump Conversion to Variable-Speed Air-Source Heat Pump	Dollar-for-dollar, not to exceed \$9,000	11.5.3	
	Ducted Variable-Speed Heat Pump Conversion Upgrade	Dollar-for-dollar, not to exceed \$9,000	11.5.4	
	Centrally Ducted Air Conditioners	Dollar-for-dollar, not to exceed \$3,800	11.5.5	Example includes: repair to damaged siding at connection point
	Prescriptive Duct Sealing	Dollar-for-dollar, not to exceed \$750	11.5.8	Examples include: replace rusted ductwork and repair broken filter slot
	Unitary Heat Pump Water Heater – 40 Gallon	Dollar-for-dollar, not to exceed \$2,800	11.4.2	Example includes: replacement of plumbing connections at water heater
	Unitary Heat Pump Water Heater – 50 Gallon and above – Tier 3	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Unitary Heat Pump Water Heater – 50 Gallon and above – Tier 4	Dollar-for-dollar, not to exceed \$3,000	11.4.3	
	Split-System Heat Pump Water Heater	Dollar-for-dollar, not to exceed \$3,000	11.4.4	
	Communicating Line Voltage Thermostat	Dollar-for-dollar, not to exceed \$225	11.6.2	No repair costs allowed for this measure
	BPA Approved Contractor-Installed Advanced Smart Thermostat	Dollar-for-dollar, not to exceed \$400	11.6.3	
Replacement of Pre-1976 Manufactured Home with New NEEM Certified Home	Dollar-for-dollar, not to exceed \$7,500	See Unit 4 – Part E		

UNIT 5 – BONNEVILLE POWER ELIGIBLE UTILITY CUSTOMERS

Albion, City of	Farmers Elec Coop	Okanogan County PUD #1
Alder Mutual	Ferry County PUD #1	Orcas P & L
Ashland, City of	Flathead Elec Coop	Oregon Trail Coop
Asotin County PUD #1	Forest Grove, City of	Pacific County PUD #2
Bandon, City of	Franklin County PUD #1	Parkland L & W
Benton County PUD #1	Glacier Electric Coop	Pend Oreille County PUD #1
Benton REA	Grant County PUD #2	Peninsula Light Company
Big Bend Elec Coop	Grays Harbor PUD #1	Plummer, City of
Blachly Lane Elec Coop	Harney Elec Coop	Port Angeles, City of
Blaine, City of	Hermiston, City of	Port of Seattle - SETAC Int'l. Airport
Bonnors Ferry, City of	Heyburn, City of	Raft River Elec Coop
Burley, City of	Hood River Elec Coop	Ravalli County Elec Coop
Canby, City of	Idaho County L & P	Richland, City of
Cascade Locks, City of	Idaho Falls Power	Riverside Elec Coop
Central Electric Coop	Inland P & L	Rupert, City of
Central Lincoln PUD	Jefferson County PUD #1	Salem Elec Coop
Centralia, City of	Kalispel Tribal Utility	Salmon River Elec Coop
Cheney, City of	Kittitas County PUD #1	Seattle City Light
Chewelah, City of	Klickitat County PUD #1	Skamania County PUD #1
Clallam County PUD #1	Kootenai Electric Coop	Snohomish County PUD #1
Clark County PUD #1	Lakeview L & P (WA)	Soda Springs, City of
Clatskanie PUD	Lane County Elec Coop	Southside Elec Lines
Clearwater Power	Lewis County PUD #1	Springfield Utility Board
Columbia Basin Elec Coop	Lincoln Elec Coop (MT)	Steilacoom, Town of
Columbia Power Coop	Lost River Elec Coop	Sumas, Town of
Columbia REA	Lower Valley Energy	Surprise Valley Elec Coop
Columbia River PUD	Mason County PUD #1	Tacoma Public Utilities
Consolidated Irrigation District #19	Mason County PUD #3	Tanner Elec Coop
Consumers Power	McCleary, City of	Tillamook PUD #1
Coos Curry Elec Coop	McMinnville, City of	Troy, City of
Coulee Dam, City of	Midstate Elec Coop	Umatilla Elec Coop
Cowlitz County PUD #1	Milton, Town of	Umpqua Indian Utility Cooperative
Declo, City of	Milton-Freewater, City of	United Electric Coop
Douglas Electric Cooperative	Minidoka, City of	Vera Irrigation District
Drain, City of	Mission Valley	Vigilante Elec Coop
East End Mutual Electric	Missoula Elec Coop	Wahkiakum County PUD #1
Eatonville, City of	Modern Elec Coop	Wasco Elec Coop
Ellensburg, City of	Monmouth, City of	Weiser, City of
Elmhurst Mutual P & L	Nespelem Valley Elec Coop	Wells Rural Elec Coop
Emerald PUD	Northern Lights	West Oregon Elec Coop
Energy Northwest	Northern Wasco County PUD	Whatcom County PUD #1
Eugene Water & Electric Board	Ohop Mutual Light Company	Yakama Power
Fall River Elec Coop	Okanogan County Elec Coop	