

BPA Income Qualified Regional Workgroup

October 6, 2025



Today's Agenda

Welcome & General Updates	9:00am
Lifecycle of a BPA Measure (<i>Phillip Kelsven, BPA</i>)	9:10am
Overview of BPA Repair Costs & Guidance Document (<i>Amy Burke, BPA</i>)	9:45am
Rate Period Updates (<i>Amy Burke, BPA</i>)	10:00am
<i>BREAK (15 mins)</i>	<i>15 mins</i>
Inland Power's CARE Program (<i>Haley Puntney, Inland Power</i>)	11:00am
Open Discussion	11:30am
Next Steps & Closing <ul style="list-style-type: none">○ <i>Next Steering Committee Meeting: November/December 2025</i>○ <i>Next Workgroup Meeting will be in January 2026</i>○ <i>Agenda Topics for Future Meetings</i>	11:50am
Adjourn	12:00pm

*Please type in the chat your name,
organization and position.*

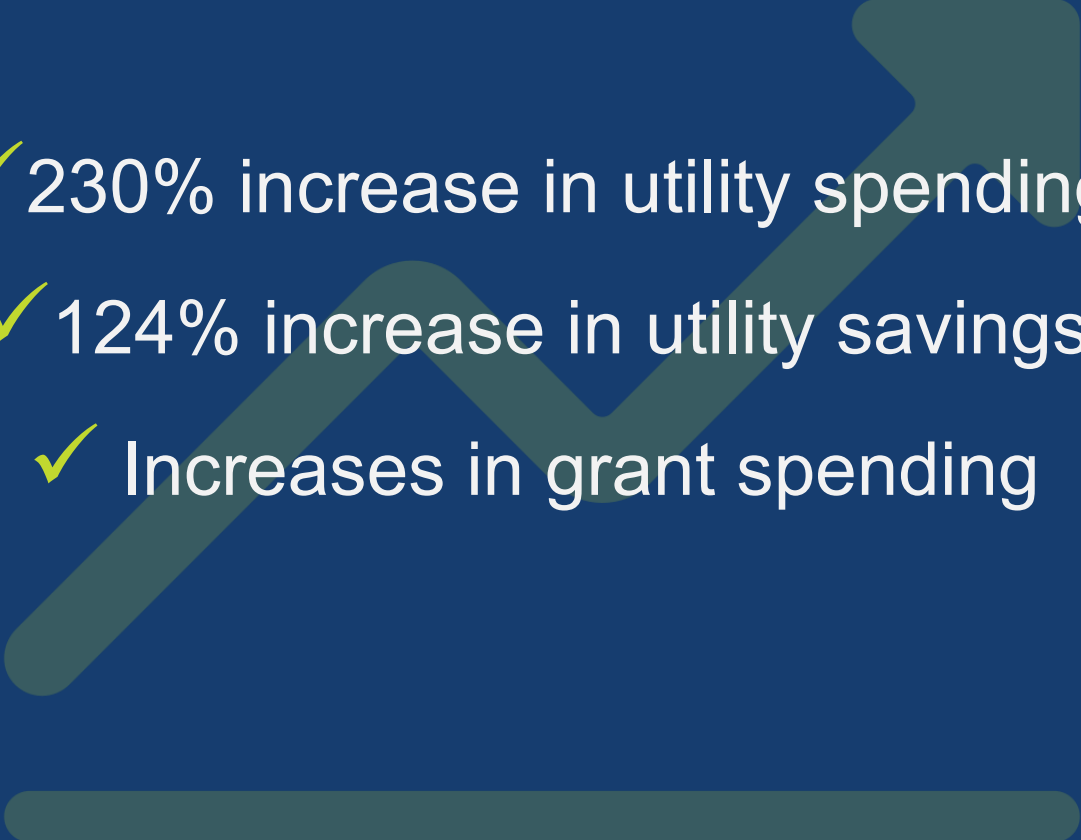


*And if you want, what's your favorite
thing about fall?*



General Updates

Recap: Fiscal Years 2024 – 2025

- 
- ✓ 230% increase in utility spending
 - ✓ 124% increase in utility savings
 - ✓ Increases in grant spending

Recap: Fiscal Years 2024 – 2025

Of what has been reported so far...

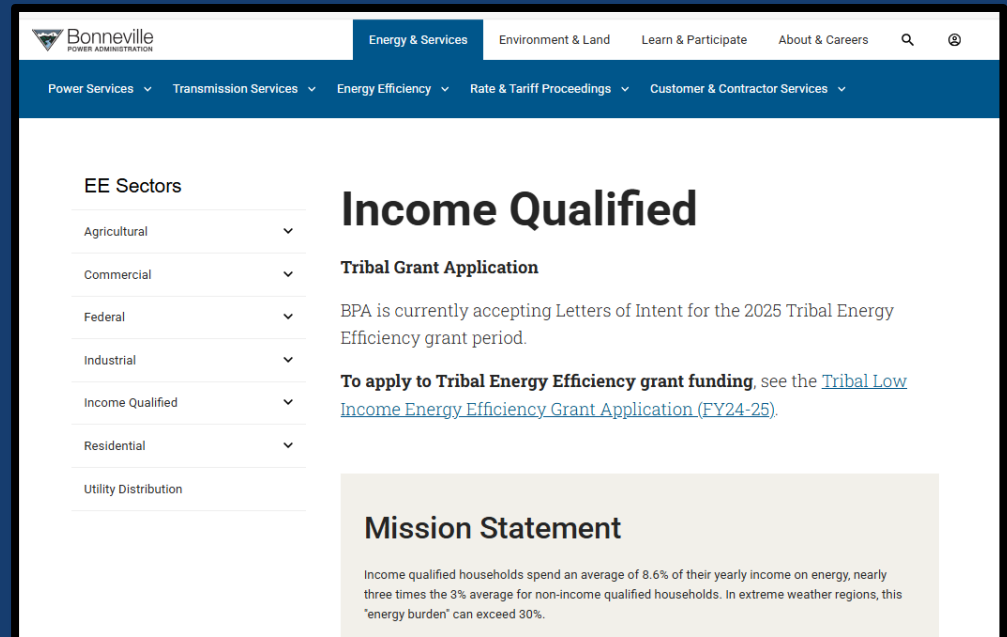
- ✓ Over 1,000 homes were fully weatherized, including 340 tribal homes
- ✓ Over 1,400 washers and dryer installed
- ✓ Over 1.5 million sq feet of insulation, which is 26 football fields worth!
- ✓ 109 ductless and ducted heat pumps and central air conditioners were installed through the grants alone
- ✓ 24 heat pump water heaters were installed the grants
- ✓ Record number of participating utilities!

Every home type was served, from single-family homes to manufactured homes to multifamily units, even some commercial multifamily!

Updated Program Name

Name officially updated
to “Energy Efficiency
Income Qualified”!


Updated all Income
Qualified resources,
including many URLs.



<https://www.bpa.gov/energy-and-services/efficiency/ee-sectors/energy-efficiency-income-qualified>

Updated Program Name

- ✓ Comfort Ready Home Income Qualified Resources Page
(<https://comfortreadyhome.com/income-qualified/>)
- ✓ Comfort Ready Home Field Guide
(https://s34610.pcdn.co/wp-content/uploads/2025/02/CRH-2024-2025-Residential-Field-Guide_2025.pdf)



Energy Efficiency INCOME QUALIFIED Programs

How to partner with and refer customers to non-profit energy efficiency programs

Energy-efficiency installations can have high upfront costs, limiting access to upgrades for income-qualified residents.

Historically, lower-income residents often pay a much higher percentage of their household income on utility bills, resulting in a higher energy burden.

Fortunately, participating utilities, tribal partners, state agencies and community action agencies, or CAAs, can offer higher incentives to income-qualified homeowners and renters to encourage energy-efficiency projects and installations. This can


ONE MISSION, TWO PROGRAMS

As part of BPA's work to ensure energy-efficiency is available to rate payers of all income levels, BPA operates two Energy Efficiency Income Qualified programs. Funding from both income qualified programs can be used in the same home, as long as they are not used on the same part of the installation.

One is managed by public utilities through their Energy Efficiency Incentives. For incentive-funded projects, or measures, utilities can offer higher incentive amounts for income qualified homes to cover the cost

Updated Program Name

- ✓ Optional Income Qualified Project Information Form in the Document Library
- ✓ Includes reference to the 2025 Federal Poverty Levels
- ✓ Customizable as needed
- ✓ *Three format options:*
 - ✓ [Income Qualified Project Information Form + Income Verification \(Optional – Customizable Word Document\)](#)
 - ✓ [Income Qualified Project Information Form + Income Verification \(Optional – Fillable PDF\)](#)
 - ✓ [Income Qualified Eligibility Form \(Optional\)](#)



COMPANY LOGO
PUBLIC UTILITIES

Please return this form to:

Optional BPA Income Qualified Project Information Form [template]
 For residential applications. This data collection tool is optional. To customize this form, contact your EER.
 Check with the resident's local utility to determine eligibility, technical, documentation, and submission requirements. A

INCOME ELIGIBILITY
 A household may qualify for incentives if it meets at least one of the following criteria listed in Table 1 below. You may provide proof of income, either by providing verifiable documentation to your utility or Community Action Agency or by signing a self-attestation that your household meets at least one income qualification criteria. This data collection tool is optional. To customize this form, contact your EER.

▲ Gross income includes all wages, tips, rental income, public assistance, social security or pensions, income from self-employment, alimony, interest, or any other sources of income defined by the IRS income tax return.

Table 1: Qualifying Income Criteria

Total Number of People in the Household, Including Yourself	Household's Gross Annual Income
<input type="checkbox"/>	Gross income falls within 200% of the federal poverty line (see Table 2)
<input type="checkbox"/>	Gross income meets your state's income guidelines (if different)
<input type="checkbox"/>	Gross income meets your tribe's income guidelines (if different)
<input type="checkbox"/>	LIHEAP
<input type="checkbox"/>	HUD
<input type="checkbox"/>	NAHASDA
<input type="checkbox"/>	Section 8
<input type="checkbox"/>	TANF
<input type="checkbox"/>	Supplemental Social Security

Table 2: Income Qualifications Based on 200% of 2025 Federal Poverty Level

1 person	\$31,300
2 people	\$42,300
3 people	\$53,300
4 people	\$64,300
5 people	\$75,300
6 people	\$86,300
7 people	\$97,300
8 people	\$108,300
9 or more	Add \$11,000 each

Proof of Income Option 1: Income Verification with Documentation
 Submit documentation to entity verifying income or to confirm eligibility. Check with resident's utility to determine if other income documentation is necessary.

Eligible Income Sources	Documentation Submitted to Utility (Only one document necessary)	Utility Verified Documentation (Note: Utility is not required to collect or maintain documentation after verification.)
Community Action Agency Certification	<input type="checkbox"/>	<input type="checkbox"/>
Pay stub	<input type="checkbox"/>	<input type="checkbox"/>
IRS form 1040	<input type="checkbox"/>	<input type="checkbox"/>
LIHEAP certification	<input type="checkbox"/>	<input type="checkbox"/>
HUD eligibility	<input type="checkbox"/>	<input type="checkbox"/>
NAHASDA eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Section 8 eligibility	<input type="checkbox"/>	<input type="checkbox"/>
TANF eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Supplemental Social Security	<input type="checkbox"/>	<input type="checkbox"/>
Proof of current assistance from state health and human services agency	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Income	<input type="checkbox"/>	<input type="checkbox"/>
GA	<input type="checkbox"/>	<input type="checkbox"/>
VA	<input type="checkbox"/>	<input type="checkbox"/>
Unemployment	<input type="checkbox"/>	<input type="checkbox"/>

BPA Income Qualified Project Information Form – Last Updated October 2025

Income Qualified Workgroup Resources

Listed on the [BPA Income Qualified Webpage](#):

- ✓ Workgroup Charter with Steering Committee Members
- ✓ Current & Past Meeting Materials
- ✓ Workgroup Discussion Topic Reference List

EEIQ Workgroup Resources

Workgroup Charter

The current Workgroup Charter can be found here: [Structure and Organizing Principles for the BPA Northwest Energy Efficiency Income Qualified Workgroup](#) (amended Aug. 2025).

Discussion Topic Reference List

To glance at what discussion topics that BPA and the Workgroup Steering Committee are aware of and will consider for future meetings, click on the [Income Qualified Workgroup Discussion Topic Reference List](#).

Presentation and Webinars Events Page

All meetings will be posted to [BPA's Presentation & Webinars events page](#).

Meeting Materials Archive

Meeting #24, October 6, 2025, 9am - 12:00pm PDT (Remote access only)

- [Agenda](#)
- PowerPoint Presentation
- Meeting Notes

<https://www.bpa.gov/energy-and-services/efficiency/ee-sectors/energy-efficiency-income-qualified>¹⁰

***Open Invitation to attend and
participate in future workgroups!***

Email aaburke@bpa.gov to join the mailing list.





Lifecycle of a BPA Measure

Phillip Kelsven, BPA
Energy Efficiency Representative

What is a UES Measure?

- A Unit Energy Savings (UES) measure is a per unit savings estimate for a particular application of an energy saving measure.
- UES is the average savings that is expected given the particular application of the measure.
- The actual savings will almost always vary from the UES because no application is really “average”.

Why UES?

- UES is more resource efficient than attempting to calculate or model each installation of a measure, which would require significant resources.
- Reward of efficient reporting and incentive setting outweighs risk of being accurate on savings.
- Actual savings are eventually trued up through evaluation.

RTF UES vs BPAQ

**Unit Energy
Savings (UES)**

**Regional Technical
Forum (RTF)**

**BPA Qualified
(BPAQ)**

RTF UES vs BPAQ

- Regional Technical Forum (RTF) measures are much more common than BPAQ.
- RTF is a committee of the NW Power and Conservation Council formed in 2000 to streamline regional savings and measure specifications.
- Made up of 28 voting members from across the region.
- Meet monthly to approve, update, sunset UES measures.



Regional
Technical Forum

NWCOUNCIL.ORG • CONTACT

Calendar Work products Subcommittees ... 🔍

The RTF is a technical advisory committee to the Northwest Power and Conservation Council established in 1999 to develop standards to verify and evaluate energy efficiency savings



Recent highlights

NEWS 2024 Annual Report

The report details the RTF's many accomplishments in 2024. This includes maintaining and updating its measure library; considering new opportunities for potential future measures; and refining the RTF's tools to further support energy efficiency and demand response work. In looking to continue to develop energy efficiency measures applicable to the region, the RTF spent time in 2024 researching the data center market with a specific lens on identifying energy

Actions



Attend a meeting



Find a subcommittee



Propose a measure



Propose a measure



Find a subcommittee



Attend a meeting

RTF Measures

- RTF approves work on developing measures twice a year.
- Anyone can request a measure via a form on the website.
- RTF staff conducts national scans or other research to suggest new measures.
- RTF staff works on measures and brings them to RTF for approval.

RTF Measure: Ductless Heat Pumps

Ductless Heat Pumps One to One

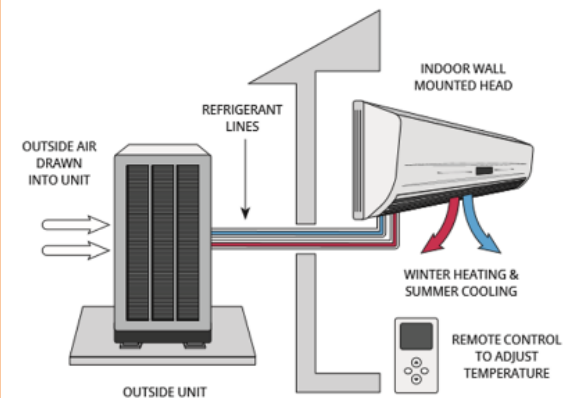
Proposed New Measure Basic Details

Status	Active
Category	Planning (SF) and Small Saver (MH)
Regional potential	53 aMW (Single Family) 0.3 aMW (Manufactured Home)
Adoption date	May 22, 2025
Sunset date	May 31, 2028
Most recent version	N/A
Fuel type	Electric
Baseline type	Pre-conditions
Brief measure description	Installation of a single head to single outdoor unit ductless heat pump in the main living space of a Single Family or Manufactured Home that has Electric Resistance Zonal heat

Demand Response Potential

- Limited to None

Ductless Heat Pumps (DHP)



<https://www.betterhomesbc.ca/products/what-are-ductless-mini-split-heat-pumps/>

Measure Maintenance

- All RTF measures have sunset dates when the RTF needs to update, extend the sunset date, or deactivate the measure.
- Most measures have research plans that RTF expects the region to undertake to update the measures with.
- In the absence of primary research, RTF staff will search for other research or relevant data to update the measure with.

Measure Maintenance

Most measure updates involve:

- Change to savings
- Change to assumed baseline
- Change to delivery verification
- Change to specification
- Change to research plan
- Change to costs and cost effectiveness

RTF Measures: Connected Thermostats

Connected Thermostats: Overview

Current Measure Basic Details

Status	Under Review
Category	Planning & Proven
Regional potential	105.3 aMW prior to being integrated into CDHP savings for the 9 th Plan Gas: Not calculated
Adoption date	7/6/2019
Sunset date	9/30/2025
Most recent version	Version 2; 1/23/2025 Placed Under Review with Sunset Date extension
Fuel type	Electric & Natural Gas
Baseline type	Pre-conditions
Brief measure description	Installation of an ENERGY STAR® certified connected thermostat with an occupancy sensor in a home with either a CDHP, gFAF, or eFAF that has a pre-existing thermostat which is not qualified

Proposed Measure Update

Contract Analyst	David Bopp
Status and category	Active & Planning
Regional potential	CDHP: 0 outside of CDHPs with minimal/no ER heat gFAF: 0 – 50 million therms eFAF Pending
Proposed updates	<ul style="list-style-type: none">• Deactivation of CDHP direct install with resistance optimization applications• CDHP direct install and retail applications set to zero savings• gFAF & eFAF savings• Costs & Lifetime
Subcommittee review	Residential HVAC Subcommittee; August 26, 2025

Measure Maintenance

BPA uses the RTF measures directly and will typically implement measure updates in the next rate period.

Reasons for deactivation include:

- Evidence of no savings
- Low uptake
- No research to update measure
- Efficient baseline negates need for measure

BPA Qualified (BPAQ)

- The other way measures are created is through an internal process “BPA Qualified” or BPAQ for short.
- The process is much like the RTF process only using internal BPA staff and a cross functional BPA Qualified committee.
- BPA Qualified measures are reviewed every rate period.

BPA Qualified (BPAQ)

Two types of BPA Qualified:

- New BPAQ Measures.
- “Structural” Measures which are deviations from the RTF measures most often to simplify the measure set for ease of reporting.

Incentive Levels

- BPA sets the incentive levels with first year savings as a guide and \$ per kWh targets.
- Aim to not go over incremental costs.
- Incentive levels do not affect cost effectiveness.

Unique Baselines

There have been requests to create baselines for unique applications including:

- Rural areas
- Income qualified homes
- State by state to account for differing building codes and housing stocks

RTF has largely not developed special measures for these populations.

The background features a large, stylized red question mark in the center. Surrounding it are numerous grey gears of various sizes, some of which are partially obscured by the question mark. The overall aesthetic is industrial and mechanical.

Questions or Comments?

Where to Find UES Measures Offerings

UES Measure List

- <https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/251001-beets-ues-measure-list-v3.xlsx>
- Effective October 1, 2025
- Uploaded into BEETS reporting system

Implementation Manual

- <https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/implementation-manual-2026-2027-final.pdf>
- Effective October 1, 2025
- Full list of available UES measures with implementation details

Grant Offerings

Your BPA grant manager if implementing BPA grant funding.

Who Decides What Gets Implemented Where?

BPA offers a suite of UES measure offerings across the Northwest. It is at the discretion of each utility and grantee which measures get offered where and at what incentive level.

Have an Idea for a New Measure?

If there is a need for a measure, let us know! BPA
Utilities can reach out to their Energy Efficiency
Representative (EER) and others can either reach out
to their grant managers or directly to BPA's EEIQ team.

The background of the slide features a scenic view of a lake. In the foreground, there are tall, thin reeds or grasses. The middle ground shows a calm body of water reflecting the sky. In the background, there are mountains with a warm, orange-brown hue, suggesting a sunset or sunrise. The right side of the slide is a solid dark blue color.

Income Qualified Repair Cost Reference Table

Amy Burke, BPA
EE Income Qualified Lead

Income Qualified Repair Cost Reference Table

Income Qualified Repair Cost Reference Table

Version: 1.0

This document is intended to help identify the types of income qualified project costs that may be eligible or ineligible for payment. **This list is not comprehensive.** If other types of costs not referenced on this list are in question, customer utilities may contact their energy efficiency representative for further clarification. **This list will be updated as needed.**

Note that not all Income Qualified measures allow for reimbursement of repair costs. Please see section 11.9 in BPA's [Energy Efficiency Implementation Manual 2026 - 2027](#) for more guidance on which measures are eligible for repair costs.

Income Qualified Repair Costs

For income qualified projects, related repair costs must be directly associated with the installation of the measure, either for health and safety reasons or to ensure the measure's effectiveness. When asked by a utility or implementer, BPA may determine what repairs are eligible. However, it is at the discretion of the customer utility to spend their EEI to cover repair and measure costs.

Customer utilities must list repair costs separately from measure installation costs on the contractor invoice and must also report them separately in BEETS. For more guidance on reporting Residential measure costs, please reference the document titled "Guidance for Reporting Residential Costs in BEETS" in the [IM Document Library](#).

Repair Cost Payment Cap

Effective October 1, 2025, for income qualified projects with a measure cost of \$1,000 or higher, related repair costs will be capped at 300% of the reported income qualified measure cost.

Cost Examples & Guidance

Below are some examples of repair and measure costs that BPA has previously provided guidance on. Included are examples already listed in section 11.9 in BPA's [Energy Efficiency Implementation Manual 2026 - 2027](#).

Task	Repair Cost Directly Related to Installed Measure	Measure Cost Directly Related to Installed Measure
Removing a dead animal for income qualified insulation.	Allowed (e.g., animal is within the wall or crawlspace being worked on)	Allowed
Plumbing-related repairs.	Allowed, so long as it relates to or is impacted by the installed measure.	Allowed, so long as it relates to or is impacted by the installed measure.
Rewiring in income qualified home receiving wall insulation that has knob and tube wiring.	Allowed	Allowed
Bringing unsafe electrical wiring up to code.	Allowed, as long as the work and upgrade are only done on the circuit affected by the income qualified efficiency measure.	Allowed



Intended Audience


- ✓ BPA Customer Utilities
 - ✓ CAP Agencies
 - ✓ BPA Staff
 - ✓ State Agencies

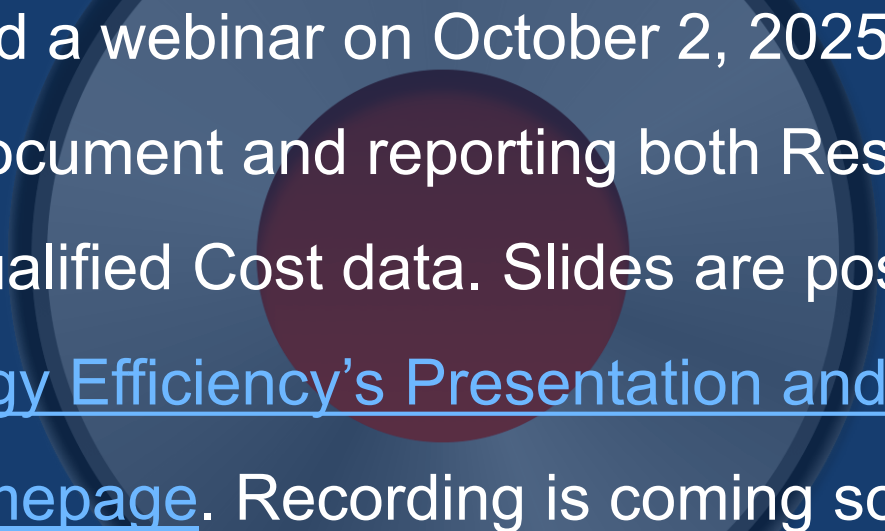
Document Posted Online

Posted in the [BPA Document Library](#) under “Residential”.

<https://www.bpa.gov/energy-and-services/efficiency/document-library>

Income Qualified

- [Tribal Low Income Energy Efficiency Grant Application \(FY 2024-2025\)](#)
- [Low-Income Project Information Form + Income Verification \(Optional – Customizable Word Document\)](#)
- [Low-Income Project Information Form + Income Verification \(Optional – Fillable PDF\)](#)
- [Income Verification Form \(Optional\)](#)
- [Repair Cost Reference Table](#) 

A decorative graphic consisting of two concentric circles. The outer circle is a light blue-grey color, and the inner circle is a darker, maroon-colored circle. Both circles have a subtle drop shadow, giving them a three-dimensional appearance as if they are floating above the dark blue background.

BPA hosted a webinar on October 2, 2025 about this guidance document and reporting both Residential and Income Qualified Cost data. Slides are posted on the [BPA Energy Efficiency's Presentation and Webinars homepage](#). Recording is coming soon.

Goal of the Guidance Document

To provide a more clarity about what income qualified-related repairs can be eligible for reimbursement as a repair, what should be included as an installation cost, or what is not eligible for reimbursement.



Income Qualified Repair Costs

- All related repair costs must be directly associated with the installation of the measure, either for health and safety reasons or to ensure the measure's effectiveness.
- When asked by a utility or implementer, BPA may determine what repairs are eligible.
- At utility's or grantee's discretion if they want to fund eligible repair and measure costs.

What's Included in this Reference Table?

- Table is not comprehensive.
- If a specific repair is not referenced on this table, it could still qualify as a repair. If there is a question about eligibility, utilities are encouraged to reach out to their EER and grantees can reach out to the EEIQ team.
- Table will be updated as needed.
- Note that not all Income Qualified measures are eligible for reimbursement of repair costs. See IM section 11.9 or your grant language about deemed measures for details.

What's Included in this Reference Table?

- Past repairs that have previously been asked about and reviewed.
- New policy guidance on full roof replacements and extended warranties.
- Nuance about some of the repair types.
- Repair examples that are already included in the Implementation Manual (IM) to create a central reference.

How to Navigate

Cost Example

Repair
example

If eligible as a
repair cost...

If eligible as an
install cost...

Below are some examples of repair and measure costs that BPA has previously provided guidance on. Included are examples already listed in section 11.9 in BPA's [Energy Efficiency Implementation Manual 2026 - 2027](#).

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Plumbing-related repairs.	Allowed, so long as it relates to or is impacted by the installed measure.	Allowed, so long as it relates to or is impacted by the installed measure.
Rewiring in income qualified home receiving wall insulation that has knob and tube wiring.	Allowed	Allowed
Bringing unsafe electrical wiring up to code.	Allowed, as long as the work and upgrade are only done on the circuit affected by the income qualified efficiency measure.	Allowed

Highlighted Nuance

When questions come up about related repair costs, try and reference this document first.

Task	Repair Cost Directly Related to Installed Measure	Measure Cost Directly Related to Installed Measure
Replacing EPDM rubber cover on roof replacement after insulating a roof.	Allowed	Allowed
Full roof replacements or tear-offs.	Not allowed as a repair cost	Not allowed as a measure cost

Example: *Roof replacements are asked about consistently. BPA clarified that costs associated with roof replacements or tear-offs are not reimbursable. However, provides further guidance that replacing just the EPDM rubber membranes after insulating the roof are an eligible cost.*

Can't Find Reference to Specific Cost or Task?

If unsure whether a related cost, task, or project is eligible as a repair cost, reach out your EER or the EEIQ team and provide relevant details about the installation. This reference list will be updated as needed.

Open to Feedback!

- This is a brand new resource.
- Goal is to improve transparency, not muddy the waters.
- If this is unclear, not helpful, or needs more information, please let your EER or the EEIQ team know and we will work to improve it!



Discussion Questions!

- *What kinds of repairs are you seeing most often in your work?*
- *What additional support do you need to navigate what are considered eligible repairs through BPA's Utility or Grant Programs?*
- *What additional technical support do you need to address common and necessary repairs?*



The background of the slide features a large, faint, light red question mark in the center. Surrounding it are numerous grey gears of various sizes, some of which are partially obscured by the question mark. The overall aesthetic is technical and industrial.

Questions or Comments?

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Rate Period Updates

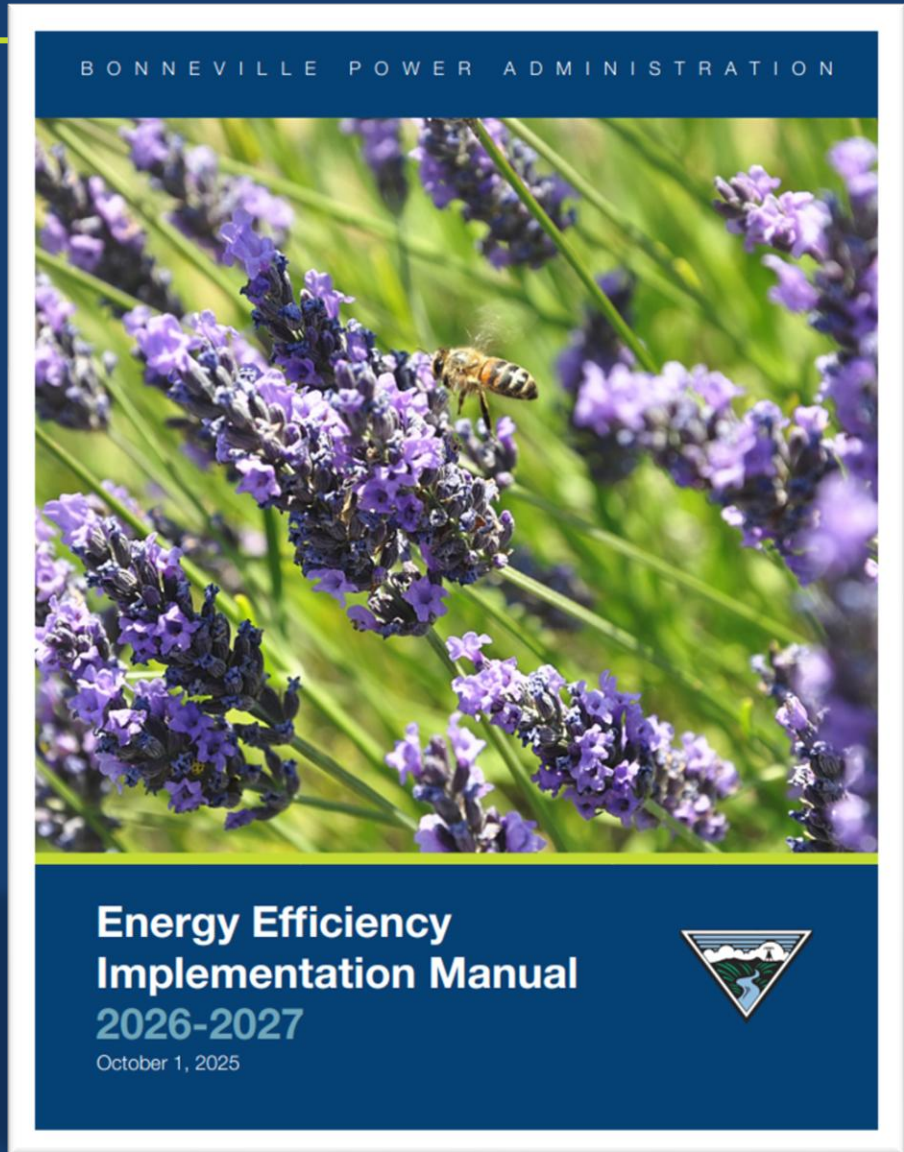
*Amy Burke, BPA
EE Income Qualified Lead*



New Implementation Manual Published

Effective October 1, 2025

<https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/implementation-manual-2026-2027-final.pdf>



Income Qualified Utility Program Updates

New UES Measure List Published with Name Change

Effective October 1, 2025

UES Reference Number	Heating Zone	Cooling Zone	Sector	End Use	Category	Technology/Activity/ Practice	Key Characteristics 1	Key Characteristics 2	Payment (\$/unit)
LELPL14523	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 1	\$800.00
LELPL14524	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 2	\$800.00
LELPL14525	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 3	\$800.00
LELPL14526	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 1	\$800.00
LELPL14527	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 2	\$800.00
LELPL14528	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	BPA Tier 3	\$800.00
LELPL14529	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	ENERGY STAR	\$800.00
LELPL14530	All Heating Zones	All Cooling Zones	Residential	Electronics	Plug Load	Clothes Dryers	Any Residential - Income Qualified	ENERGY STAR	\$800.00

Majority of Low Income RefNos remaining the same despite the name change!

<https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/251001-beets-ues-measure-list-v3.xlsx>

Highlighted Updates: Implementation Manual

- Implemented the new policy for repair cost coverage:
 - For an income qualified project with a measure cost of \$1,000 or higher, related repair costs will be capped at 300% of the reported income qualified measure cost.
- Disallowed cost coverage of full roof tear offs and replacements, with some exception for EPDM roof rubber membranes.
- Disallowed cost coverage of extended warranties.
- Published the [Income Qualified Repair Cost Reference Table](#) to provide more clarity about eligible repair costs.



Highlighted Updates: Implementation Manual

- Removed the “metal frame only” precondition from double-pane Prime Window and Patio Door Replacements.
- Required two BEETS fields be filled in when reporting Income Qualified measures. [Reference webinar slides for more details.](#)
- Removed the “By Request” measure distribution channel.
- *Note: For non-income qualified Heat Pump Water Heaters, BPA doubled incentive payments.*



Highlighted Updates: Implementation Manual

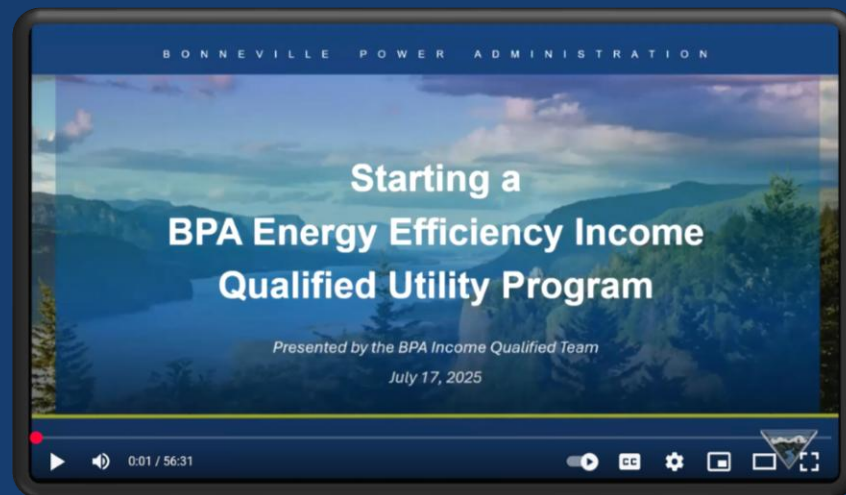
*“Household eligibility is based on gross income and is defined in the Federal Weatherization Assistance Program (WAP) as 200 percent of the poverty income levels. Alternatively, approved statewide or tribal eligibility definitions may substitute for federally established income qualified levels, **if available.**”*



Recorded Webinar: Starting an EEIQ Utility Program

Recorded webinar from July 17, 2025 covering:

- ✓ Basics of starting an EEIQ Program
- ✓ Available measures & documentation
- ✓ Claiming repair costs
- ✓ Outreach & coordination
- ✓ Income qualification
- ✓ Presentations from two utilities
- ✓ [Presentation Slides](#)
- ✓ [Recorded Webinar](#)
- ✓ [EE Presentations & Webinars Homepage](#)



Impacts of the Newly Announced Reporting Requirements

Results of the recent audit and follow-up reporting requirements were recently reviewed in a webinar on 9.25.2025.

Details about how these will be implemented will be shared out as they emerge.



<https://www.bpa.gov/-/media/Aep/energy-efficiency/presentation-webinars/250925-Audit-Findings-Webinar.pdf>

Income Qualified Grant Updates

BPA EEIQ State Grant Summary

High-level summary of the updates incorporated into the BPA EEIQ State Grant offerings.

BPA appreciates the partnership if the four state agencies throughout the iterative review process!

<https://www.bpa.gov/-/media/Aep/energy-efficiency/income-qualified/eeiq-state-grant-rate-period-fy26-28-update-summary.pdf>

BONNEVILLE POWER ADMINISTRATION

BPA's Energy Efficiency Income Qualified State Grant:
FY 2026-2028 Updates

Rate Period Changes Summary

The new rate period is here! All four states and their networks worked hard to streamline their implementation, find additional opportunities for energy conservation, address increasing installation costs, and navigate changing funding sources. It has been a successful grant period!

During fiscal years 2024-2025, over 1,000 homes were fully weatherized, including 340 tribal homes. A lot of new installations replaced outdated and inefficient equipment. These included 109 ductless and ducted heat pumps and central air conditioners, 24 heat pump water heaters, and replacing light-emitting diodes (LEDs). Every home type, from single-family homes to manufactured and multifamily homes was served.

Bonneville Power Administration (BPA) worked with each state to incorporate feedback about how these grants are structured and will continue to support this critical work throughout the Northwest. This document summarizes changes for the current rate period.

Name Change to "Income Qualified"

The program name changed from "BPA Low Income Energy Efficiency" to "BPA Energy Efficiency Income Qualified." Some references to "Low Income" remain when referring to other non-BPA funding sources and programs.

Updated Terms and Conditions

BPA added one new clause and updated five existing clauses. The full text of each clause may be accessed electronically in the [Bonneville Financial Assistance Instructions Manual \(BFAI 23-1\)](#).

- Added Clause 21 Property – Supplies and Equipment (July 2017)
- Updated Clause 29 Payment Requests (July 2025)
- Updated Clause 29 Payment Requests (July 2025)
- Updated Clause 30 Advance Payment and Financial Reporting Requirements (Oct. 2025)
- Updated Clause 31 Reimbursement Payment & Financial Reporting Requirements (Oct. 2025)
- Updated Clause 32 Budget Changes (July 2025)

It also highlighted that BPA does not require collection of Personal Identifiable Information (PII) to comply with this grant and that these grants are not assigned FAIN, CDFA, or ALN numbers or subject to the FFATA federal reporting requirements.

Performance Period Reflects Three Fiscal Years: 2026-2028

The performance period of this offering aligns with BPA's rate period, which is typically only two fiscal years. Due to the timing and awarding of BPA's power sales contracts, the next rate period is extended to three fiscal years. Future rate periods and grant performance periods are expected to return to the two fiscal years in the future. As such, BPA extended budgets that reflect the full three-year rate period to state grantees.

Language and Organization Improvements

BPA updated and reorganized language to improve understanding, clarify expectations, and streamline content.

Deemed Measure Updates

Measures that do not require an SIR calculation are now consistently referred to as Deemed Measures (previously Baseload Measures). BPA added clarification about the relationship between SIR projects and Deemed Measures. BPA outlined how it would relay changes to the Implementation Manual that could impact grant implementation.

Eligibility for Double-Pane Prime Windows

- Double-pane windows with any type of existing frame type, including vinyl, may now be replaced with new, qualifying windows. Previously, only existing double-pane windows with metal frames were eligible for replacement.

Added Split System Heat Pump Water Heaters

- Deemed payment cost cap is set up to \$3,000.

Existing Condition for Duct Insulation is Uninsulated

- For deemed duct insulation measures to qualify, the existing ducts may not be insulated.

Corrected Ducted Variable Speed Heat Pump Upgrade for Manufactured Homes

- For manufactured homes, the grant language was corrected to include an upgrade option for Variable Speed Heat Pumps.

Expired Microwaves

- BPA no longer supports this measure.

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BONNEVILLE POWER ADMINISTRATION

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BPA State Grant Updates

- Yearly budgets are consistent with the previous performance period.
- Performance periods reflect the three-year rate period.
- Streamlined much of the grant language, clarifying spending, reporting, and engagement milestones and expectations.
- Increased engagement with the states to ensure that BPA is supportive of their work and meeting the needs of their networks.
- Improved reporting to better capture in BEETS what work was done in what utility territory.

BPA State Grant Updates

- Provided guidance on vehicle purchases, equipment purchases, full roof replacements, extended warranties, interactions with Weatherization Readiness Funds, and interactions with BPA Direct Funding Demonstration (DFD) funds.
- Added split system heat pump water heaters as a deemed measure.
- Aligned relevant deemed measure changes with the Implementation Manual, including impacts to duct insulation and qualifying existing window frames.
- Clarified grant language on eligible dwelling units and participants regarding existing heating system types.

Tribal Grant Application Updates Coming Soon!

Currently finalizing updates to the Tribal grant that will reduce burdensome application requirements. This includes:

- Aligning with the state grant language changes, clarifying implementation expectations for a one-stop-shop reference.
- Publishing a new **grant application template** for Tribes to fill in with necessary details.
- Publishing a new **grant budget template** for Tribes to easily complete and submit with their documentation.

Tribal Grant Application Updates Coming Soon!

When complete, these resources will be published on the [EEIQ Tribal Resources Homepage](#) and a notice will be sent out to this group. BPA will host two webinars to review this updated process and application. Webinars will be open to any attendee.

Overall Efforts This Next Rate Period

Ongoing Efforts & Discussions: This and More!

- ✓ Admin cost coverage for CAPs.
- ✓ Ease implementation for utilities with limited budget and staff capacity.
- ✓ Engage Tribal voices more through this workgroup and with an improved grant application and outreach process.
- ✓ Actively research new measures.
- ✓ Improve approach to multifamily.
- ✓ Navigate program changes and track shifts to Income Qualified Programs outside of BPA.
- ✓ Collaborate with teams outside of BPA on program development to try and align where possible.
- ✓ Track reported cost and measure data and assess how BPA can keep up with market cost increases.



The background features a large, faint, red question mark in the center. Surrounding it are numerous grey gears of various sizes, some of which are partially overlapping. The overall color scheme is light grey with a subtle texture.

Questions or Comments?



**Break
15 Minutes**



15 Minute Break

Returning at 10:41

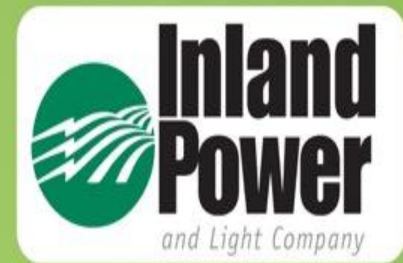
Questions to ponder on break...

- *What changes are impacting you all the most?*
- *Is there anything that you want either BPA or other workgroup members to be aware of?*
- *What would you like to share with or ask of the group?*
- *What kinds of repairs are you seeing most often in your work?*
- *What additional support do you need to navigate what are considered eligible repairs through BPA's Utility or Grant Programs?*
- *What additional technical support do you need to address common and necessary repairs?*



Inland Power's CARE Program

Haley Puntney, Inland Power



Inland Power – CARE Program


Haley Puntney

How it Started




- Needed a beneficial way to spend EEI dollars
- Found a contractor
- Crunched a lot of numbers
- Approval of program
- Soft launch






Launched end
of May 2024



Plenty more in
the pipeline



Hiccups



Work done in
60+ homes



No advertising



Community
Engagement



How It's Going



Testimonials

“I really like the program. Helped me and my family a lot. I appreciate the help and the program. I hope you keep helping low-income families that are in need. Todd is wonderful as well.”

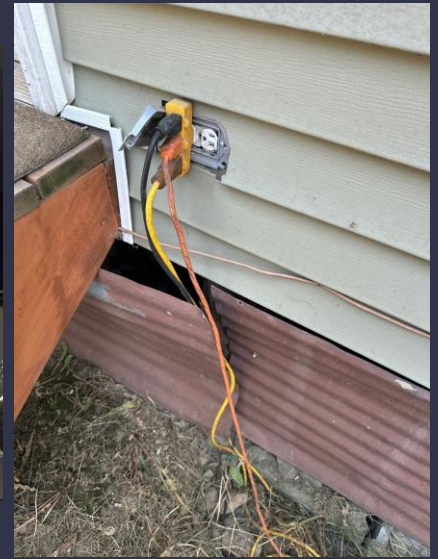


“I received assistance thru the CARE program and am very pleased.

Both Carl and Todd were very thorough and professional. They fully explained what they were doing and why. They found multiple defects in my heating ducts, which was affecting how much heat my home was getting.

Todd scheduled by email a date and time to return and make the appropriate fixes to my system. They showed up promptly and were a pleasure to work with. I can't wait to see how much more efficient my system works this winter! As a Senior on a fixed income, this was a real blessing to me. Thank you for making this program available!”

More Pictures





Questions?



**Inland
Power**
and Light Company



Open Discussion

Discussion Questions!

There is a lot of change happening right now!

- *What changes are impacting you all the most?*
- *Is there anything that you want either BPA or other workgroup members to be aware of?*
- *What would you like to share with or ask of the group?*
 - ✓ *CAP agency?*
 - ✓ *Utility?*
 - ✓ *Implementer?*
 - ✓ *Advocacy group?*
 - ✓ *BPA staff?*



Discussion Questions!

- *What kinds of repairs are you seeing most often in your work?*
- *What additional support do you need to navigate what are considered eligible repairs through BPA's Utility or Grant Programs?*
- *What additional technical support do you need to address common and necessary repairs?*





Next Steps & Closing

Meeting Recap

- ✓ Take away tasks to be addressed in future meetings.
- ✓ Priority and time sensitive topics for our next meeting.

Next Income Qualified Workgroup

Intended for January 2026 (Date TBD)

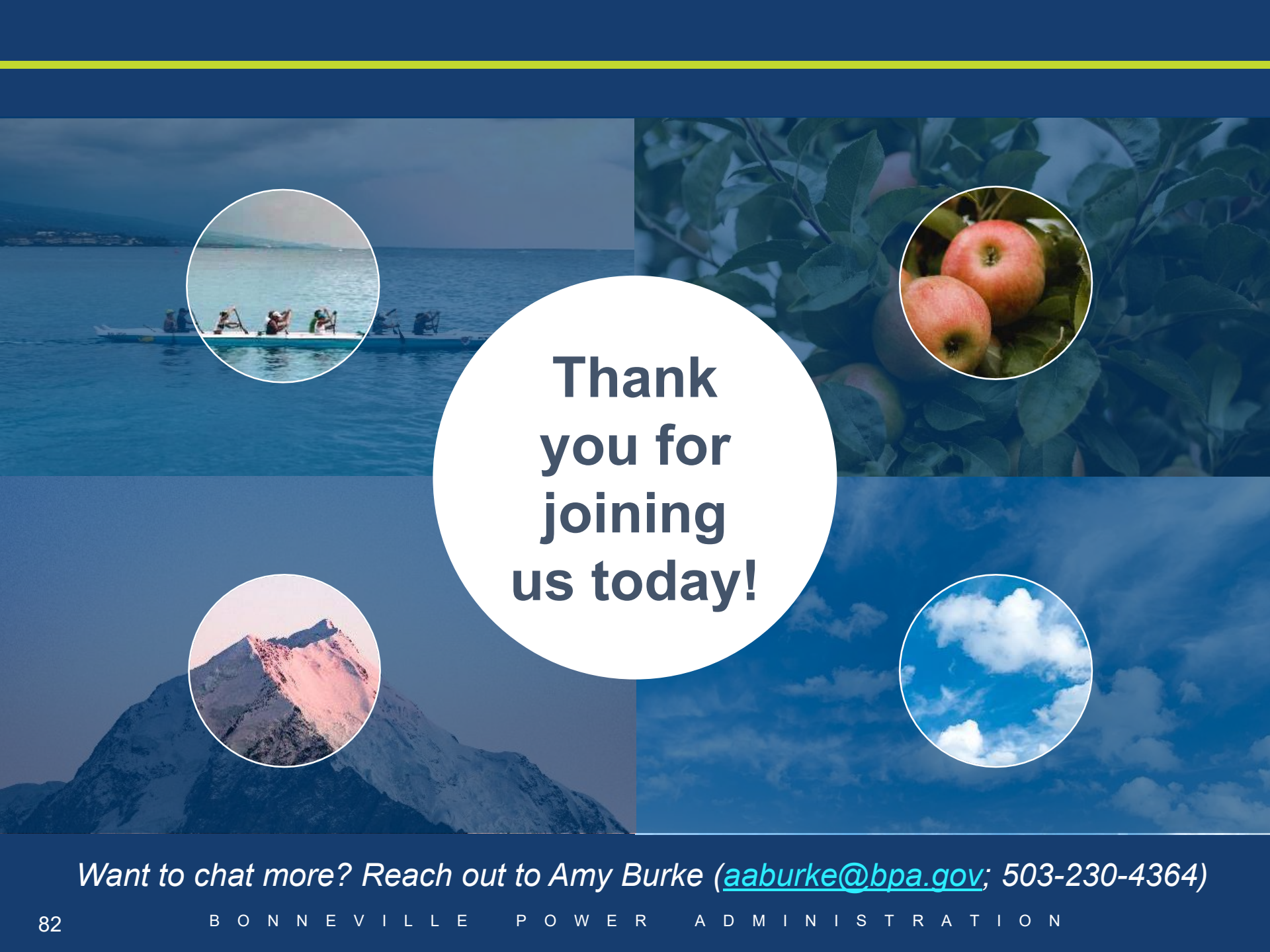
Previously suggested topics:

- Loan Programs
- Success Highlights
- Outcomes from The Energy Project Summit
- Program Success Metrics

***Open Invitation to attend and
participate in future workgroups!***

Email aaburke@bpa.gov to join the mailing list.





**Thank
you for
joining
us today!**

Want to chat more? Reach out to Amy Burke (aaburke@bpa.gov; 503-230-4364)