BPA Income Qualified Workgroup for Montana



BONNEVILLE POWER ADMINISTRATION

Today's Agenda

Time	Topic	Speaker
1:00	Welcome & Introductions • What is your favorite thing about fall?	Rachelle Powers
1:05	BPA Updates	Rachelle Powers
1:15	Working with Contractors	Cyrus Collins/Scott Mayfield
1:35	Listening Session	Rachelle Powers
2:25	Closing	Rachelle Powers



BPA Updates

Fiscal Year 2026 in Review

- Saw excellent implementation of income qualified projects in Oregon.
- Developed two new deemed measure offerings.
- Streamlined state grant language and redefined monthly accrual totals to improve implementation & tracking.
- Attended Energy OutWest.
- Participated in robust discussions regarding the NW Power Council's 9th Power Plan.
- Amy Burke transitioning to Residential Sector Lead effective Nov. 2026.



IQ: New Heat Pump Measure

Room Heat Pumps: Income Qualified (IQ) Option

- Webinar Slides & Overview Flyer
- Two tiers on a **Qualified Products List**: CEE Tier 2 & CEE Tier Advanced
- IQ payments are $800 to $2,000
- Savings range from 786 – 2,262 kWh/year
- Eligible for every housing type and every heating and cooling zones



New IM callouts…

11.5.2 Room Heat Pump (BPA-Qualified)

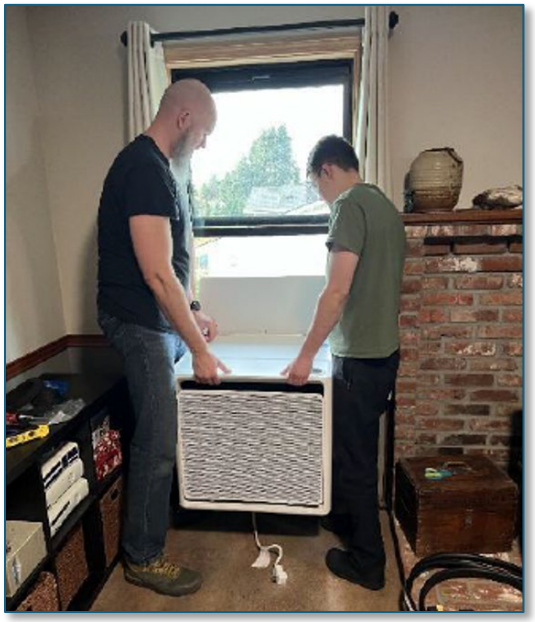
Income Qualified Measure Also Available

IQ: New Heat Pump Measure

- Currently only offered through the BPA utility programs, effective Oct. 1.
- In queue to be added to the BPA state grant offerings.
- Emerging technology, so not available through retail yet that we've found.



IQ: New Heat Pump Measure



Typically, a two-person installation



Some considerations for securing unit on slat siding



Gap is recommended for meltwater

IQ: New Construction Measure

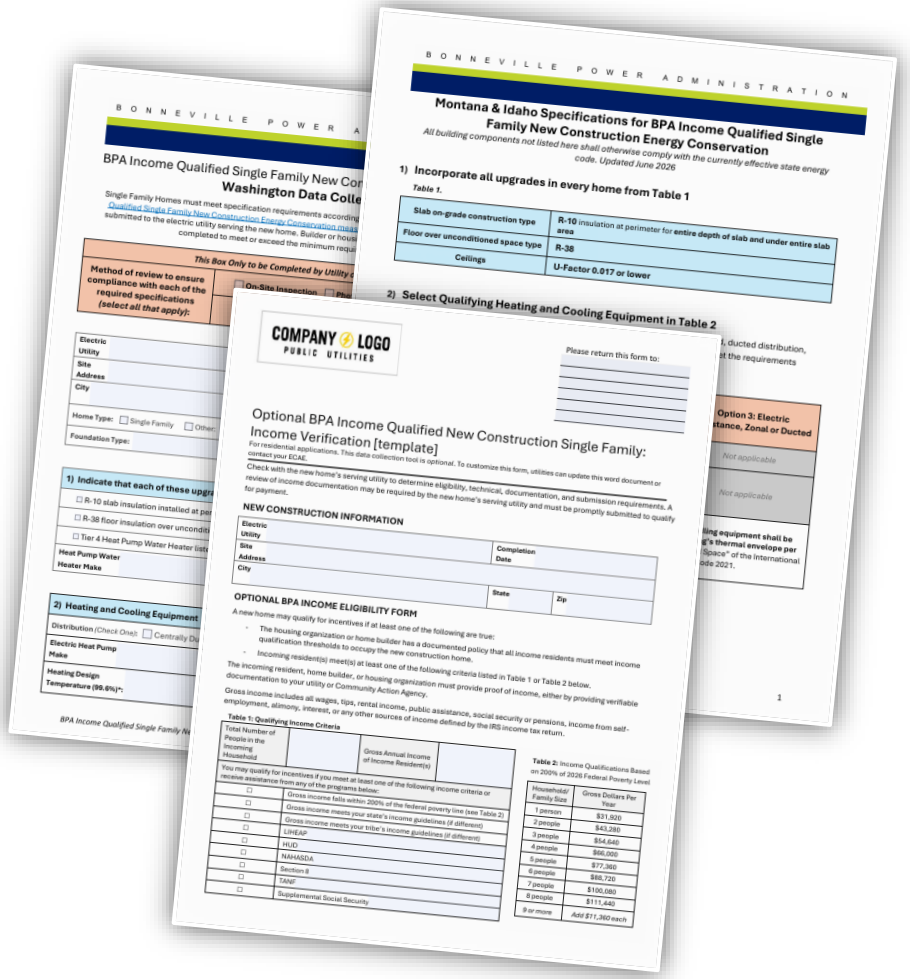
Income Qualified Single Family New Construction

- Webinar Slides & Overview Flyer
- Only eligible for **Single Family** in ID, OR, MT, and WA *(not available for WY, NV, or CA)*
- Specifications and savings based on meeting requirements above state code
- MT payments range from **$10,280 to $23,330**/ home depending on package
- MT savings range from **3,855 kWh to 11,134 kWh** / home depending on package (first-year savings)



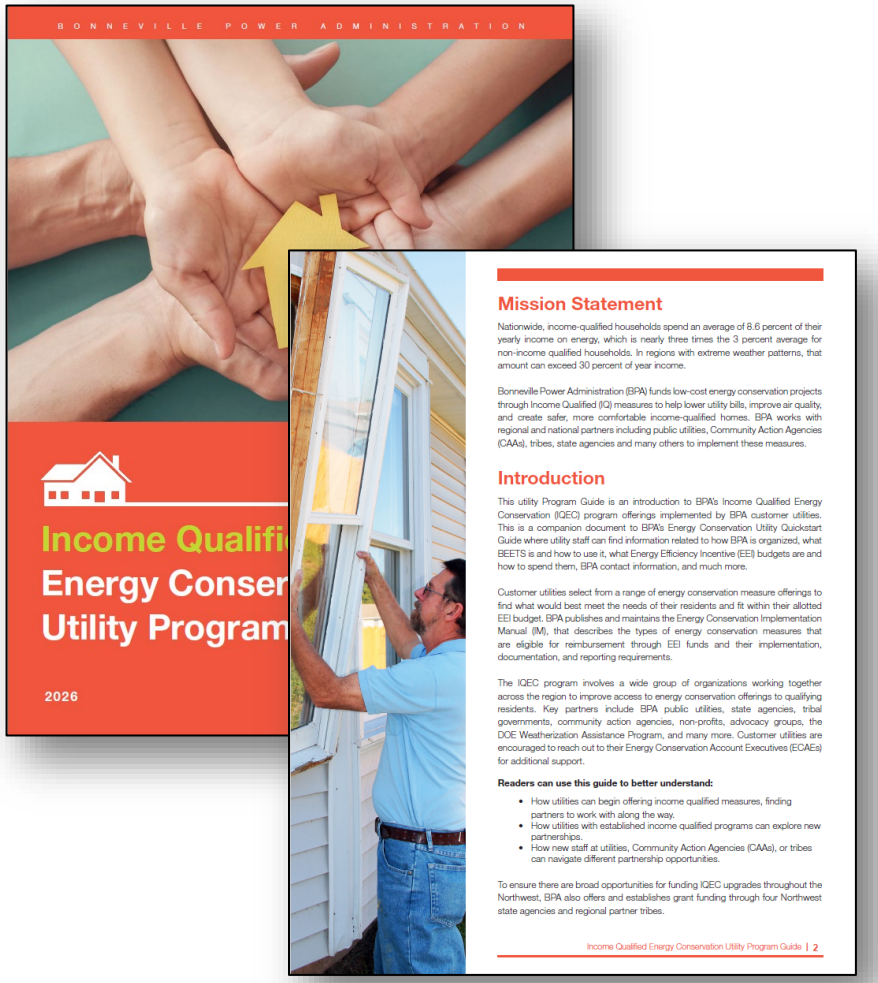
IQ: New Construction Measure

- Only offered through the BPA utility programs, effective Oct. 1. No plans to add to grant offerings unless requested.
- Forms and specs posted in the IM Document Library under *Residential - Income Qualified New Construction.*
- Lots of exceptional feedback from interviews during development.
- Outreach encouraged to building associations and organizations like Habitat for Humanity.
- Comfort Ready Home support available.



IQ Utility Program Guide

- Updated & published here
- Can find it on the IQ Home and IQ Utility webpage
- New resources and references
- Updated guidance on building relationships
- Contact information for regional Community Action Agencies



IQ Workgroup Steering Committee

Open vacancies! The BPA team will be reaching out to folks who previously expressed interest in participating. Be a part of the team that decides what we discuss here!





Questions?

ComfortReady HOME

Real Comfort. Real Savings. Real Smart.

Income Qualified Support

November 2026

Cyrus Collins

Scott Mayfield



Bonneville POWER ADMINISTRATION

Comfort Ready Home is funded by Bonneville Power Administration and Northwest Utilities.


Find a Local Contractor
Homeowner Resources
Website & Online Learning Center
Training Workshops & Webinars
Local Technical & Program Support
Marketing Resources & Support
ComfortReady HOME
Technical & Program Field Guide

Income Qualified Support

- ✓ Finding a qualified contractor to offer installation and paperwork support for income-qualified projects.
- ✓ Technical training and support.
- ✓ Building Spanish language materials for your program.
- ✓ Creating forms or marketing materials for your program.
- ✓ Customizing the Optional Income Qualified Project Information Form and Income Verification Form.
- ✓ Finding additional resources, including grants, loans, or other financing programs that might help your program.
- ✓ Project support for Low-Rise Multifamily (no more than 3 stories).

Support Does Not Cover…

ComfortReady HOME

- X *Income Verification*
- X *Audits and Inspections*
- X *Processing rebates or payments*

Many of those functions are covered by either the utility and/or Community Action Program (CAP).

Income Qualified Program Support

Option 2: Self-Attestation

As of October 1, 2023, BPA allows utility customers to accept a signed self-attestation of income status to qualify for low-income incentives. Utilities are not required to provide the income level to BPA during oversight, just that they have been reviewed and approved.

For self-attestation, utilities can use the Low-Income Project Information Form and Income Verification Form (Optional) or draft your own version. Contact your Field Specialist for assistance creating a customized form.

Fillable Form

Income Form – Only

Editable Template

Work with a Community Action Agency

Measures and Incentives

Marketing and Outreach

Reporting and Documentation

https://comfortreadyhome.com/income-qualified/

Peninsula Light Co.

Please return this form to:

Income Verification Form (Optional)

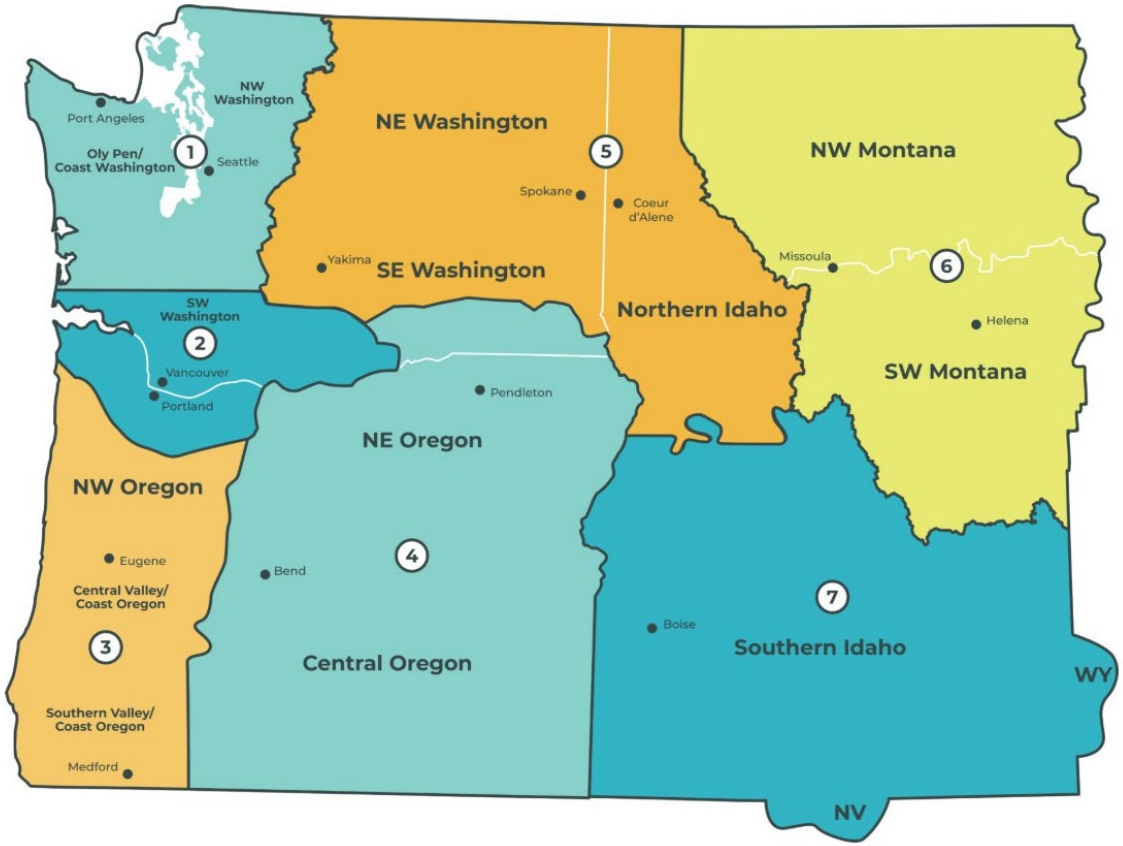
For residential applications. This data collection tool is *optional*.

Check with Peninsula Light to determine eligibility, technical, documentation, and submission requirements. A purchase receipt, invoice, project and equipment information, and a review of income documentation may be required by the resident's utility and must be promptly submitted following project completion. All projects must be installed and completed according to the technical requirements outlined by the local utility.

CUSTOMER INFORMATION

Applicant Name		*Site ID (Added by utility)*	
Utility Account Number		Phone	
Installation Street Address		City, State, Zip	
Applicant Mailing Address *(if different)*		City, State, Zip *(if different)*	
Applicant Email		Occupancy Type	☐ Owner Occupied ☐ Rental
Landlord Name *(if applicable)*		Landlord Phone *(if applicable)*	

Comfort Ready Home | Field Team





Miesha Yagle

NW Washington
Olympic Peninsula



Nick Phillips

SW Washington
NW Oregon



Mike Stothers

SW Oregon
Northern California



Aaron Lazelle

NE Washington
Northern Idaho



Scott Mayfield

Montana



Phil Robinson

Eastern Oregon
SE Washington

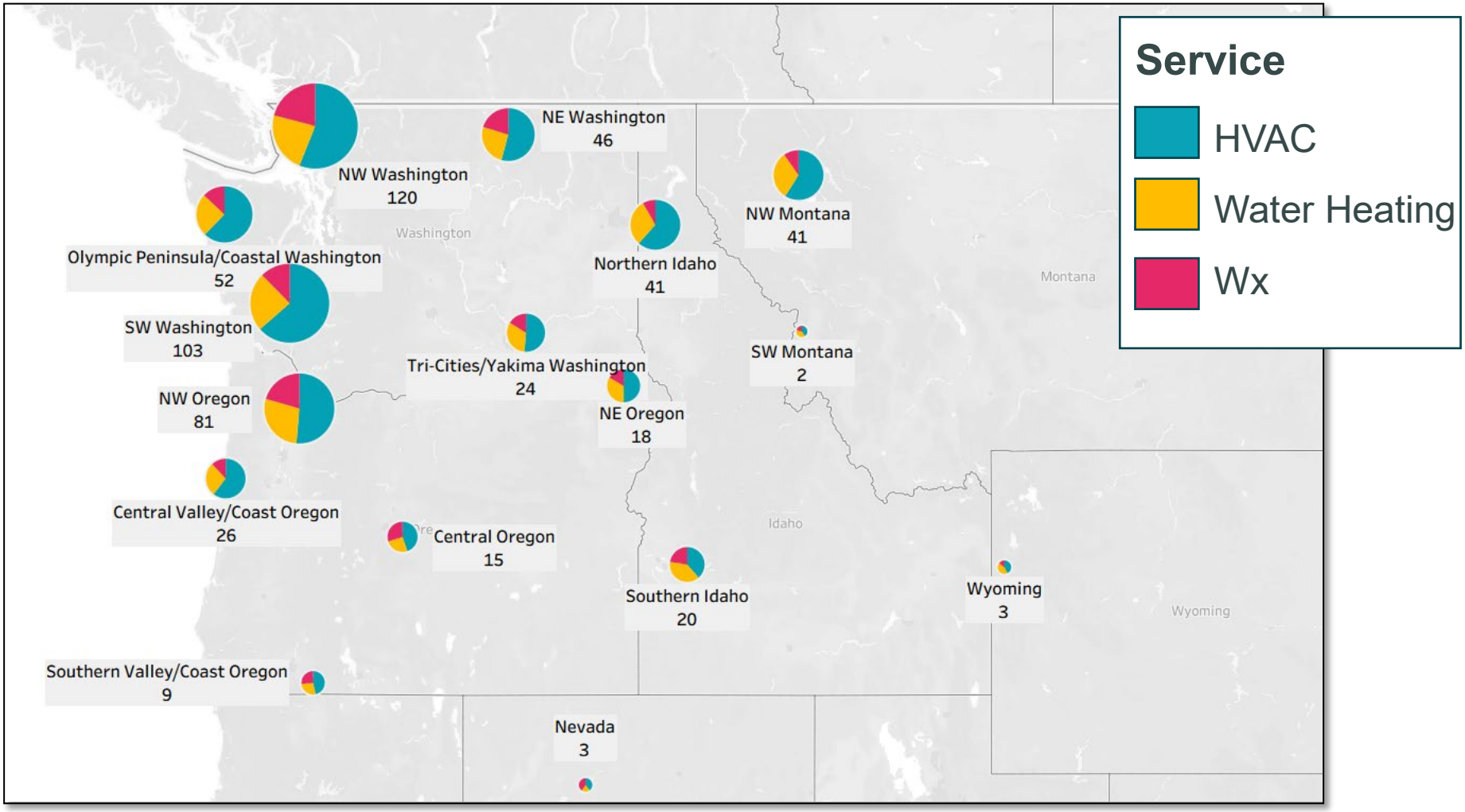


Brian Bennett

Southern Idaho
Nevada

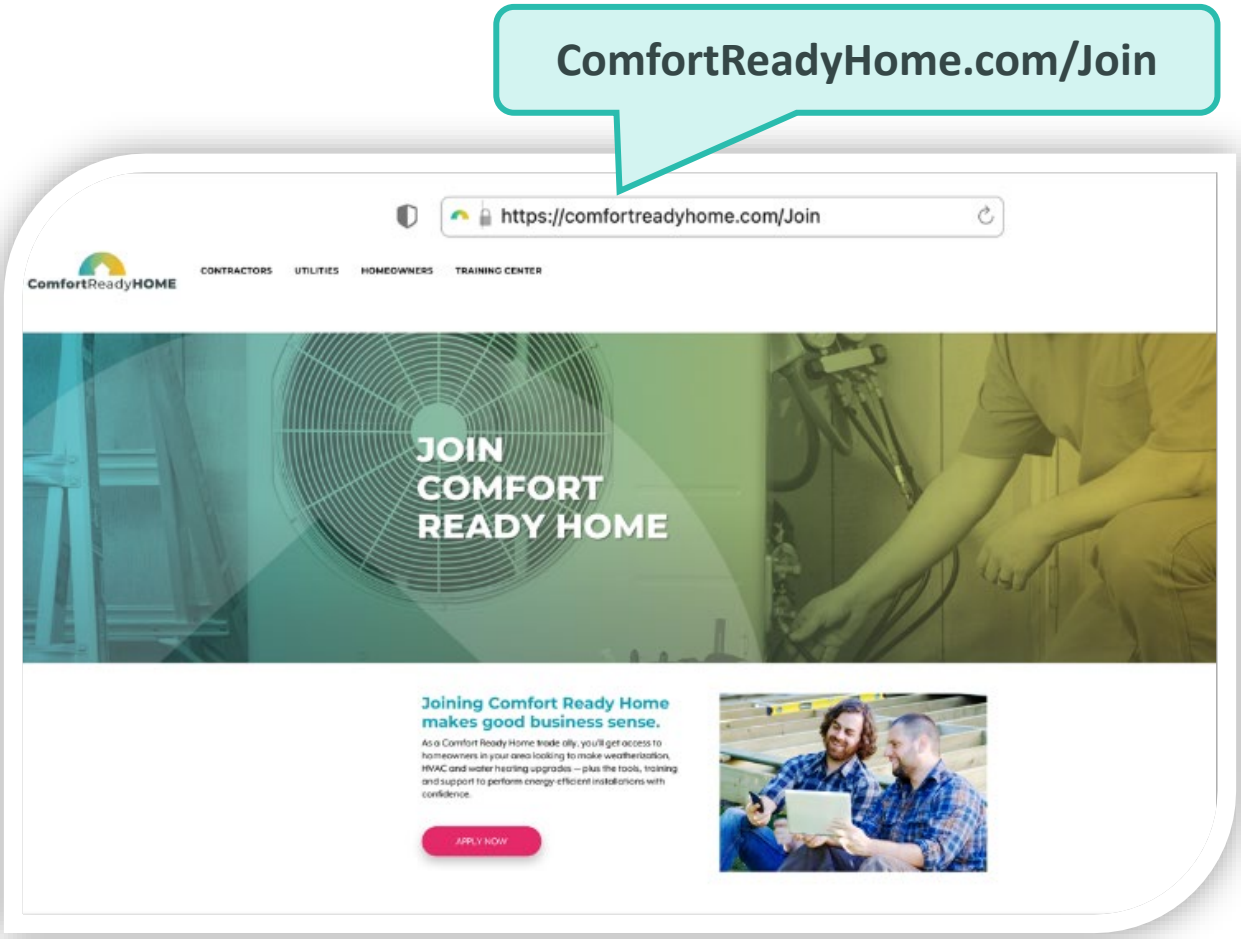
Contractor Network

Contractor Participation by Subregion



https://comfortreadyhome.com/contractor-search/

Contractor Network



1. Contractors complete online enrollment form
2. Program staff review licenses and contractor standing
3. Field Specialist connects with contractor to confirm services and verify territory

On-Site Workshops

Small Group Contractor Trainings





Responsive to Utility and Contractor needs

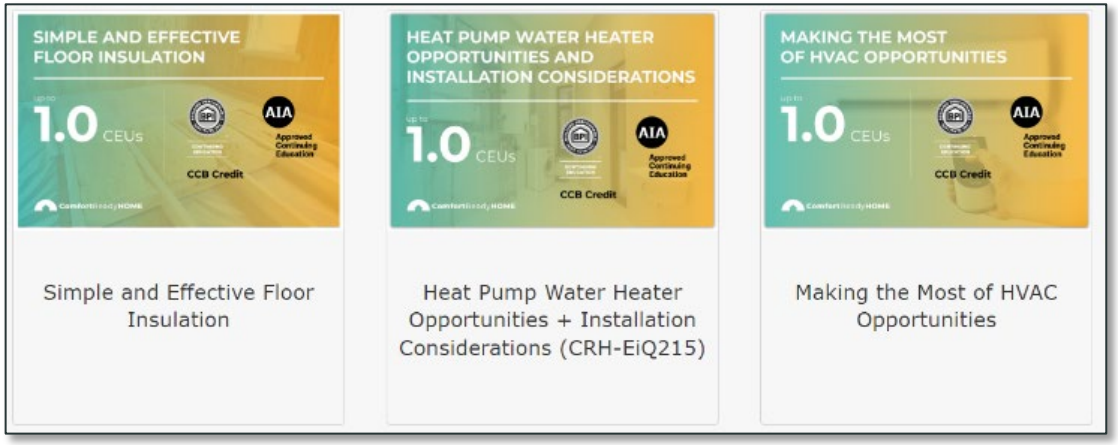
- Heat Pump Water Heaters
- Home as a System
- Wall Insulation
- Heat Pump Best Practices

On Demand Training

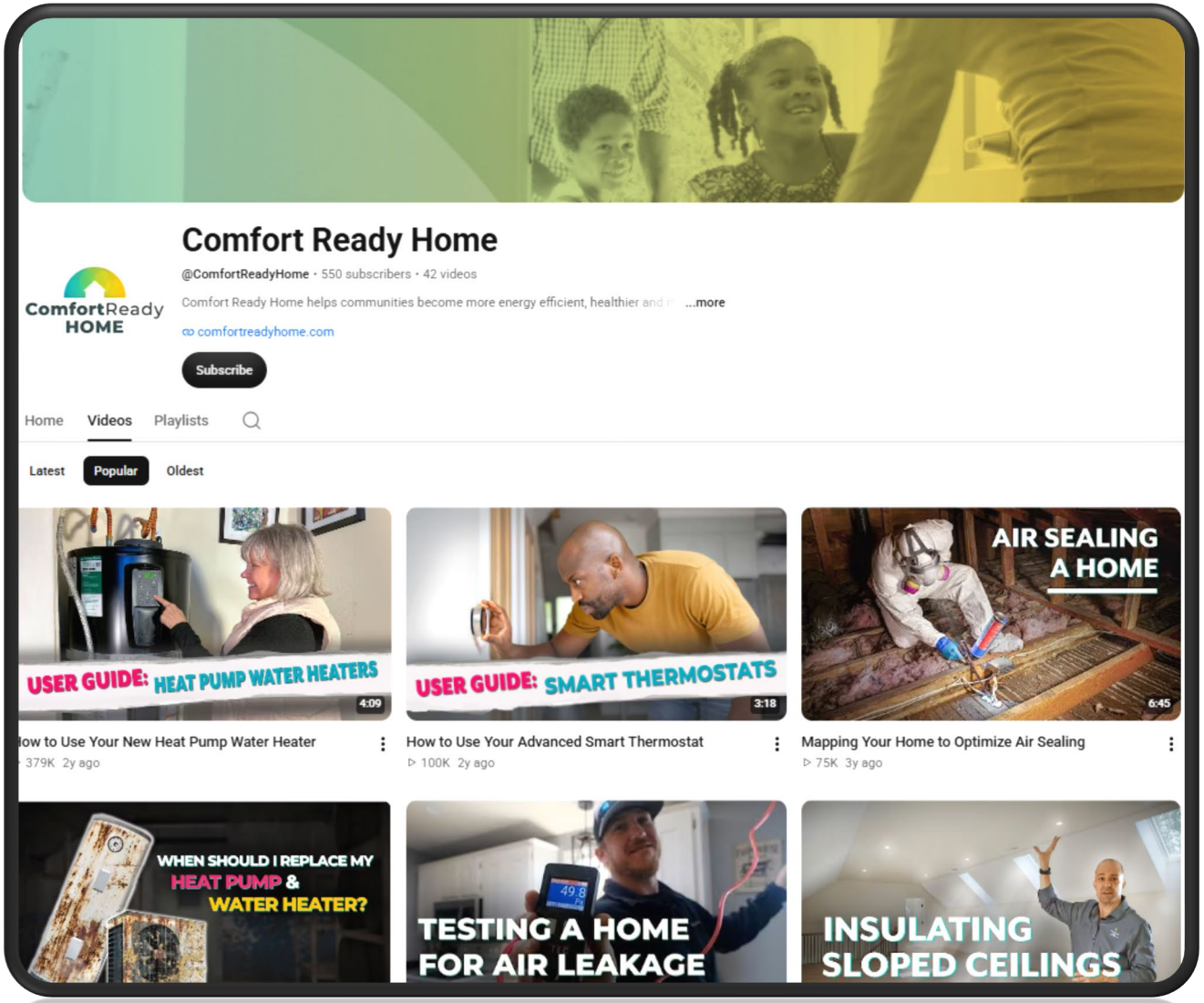


- Insulating Sloped Ceilings
- Attic Insulation
- Floor Insulation

- Cold Climate Heat Pumps
- Manufactured Home Insulation
- Site Built Wall Insulation



Training on YouTube Channel



42 Videos

550 Subscribers

https://www.youtube.com/@ComfortReadyHome/videos

Marketing Toolkit

ComfortReady HOME



Homeowner Education

ComfortReady HOME

Home Comfort Upgrades

Energy-efficiency upgrades can make your home more comfortable while lowering your monthly utility bills. There are options for every home and budget, from simple projects to comprehensive whole-home solutions.

Check out some of the most effective energy-efficiency upgrades below, then visit ComfortReadyHome.com/Homeowners to learn more, find contractors near you and connect with your utility for incentives.



1 **AIR SEALING** blocks uncontrolled air flow into and out of your home, leaving you with a quieter, healthier,

5 **SMART THERMOSTA** and convenient way to con

Many upgrades pair well and complement each other.

When investing in your home's energy efficiency, it's worth considering which upgrades work well together to maximize comfort while delivering the best value. Ask your contractor about combing different upgrades and check with your utility for available incentives.



AIR SEALING

Pairs well with: Insulation; Duct sealing; Air source heat pumps; Ductless heat pumps; Windows and doors; Ventilation

Good for: Indoor Air Quality; Utility Bills; Comfort; Environmental Footprint; Noise Reduction



DUCT SEALING

Pairs well with: Air sealing; Air source heat pumps

Good for: Indoor Air Quality; Utility Bills; Comfort; Environmental Footprint; Noise Reduction



INSULATION

Pairs well with: Air sealing; Ventilation; Ductless heat pumps; Air source heat pumps; Windows and doors

Good for: Indoor Air Quality; Utility Bills; Comfort; Environmental Footprint; Noise Reduction



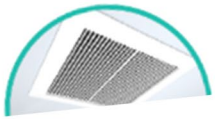
HEAT PUMPS

Pairs well with: Air sealing; Insulation; Duct sealing; Smart thermostats

Good for: Utility Bills; Comfort; Environmental Footprint







Questions?

Thank You!

Please contact your

BPA Energy Conservation Account Executive

or

Comfort Ready Home Field Specialist

info@comfortreadyhome.com

888-423-0211

ComfortReady HOME

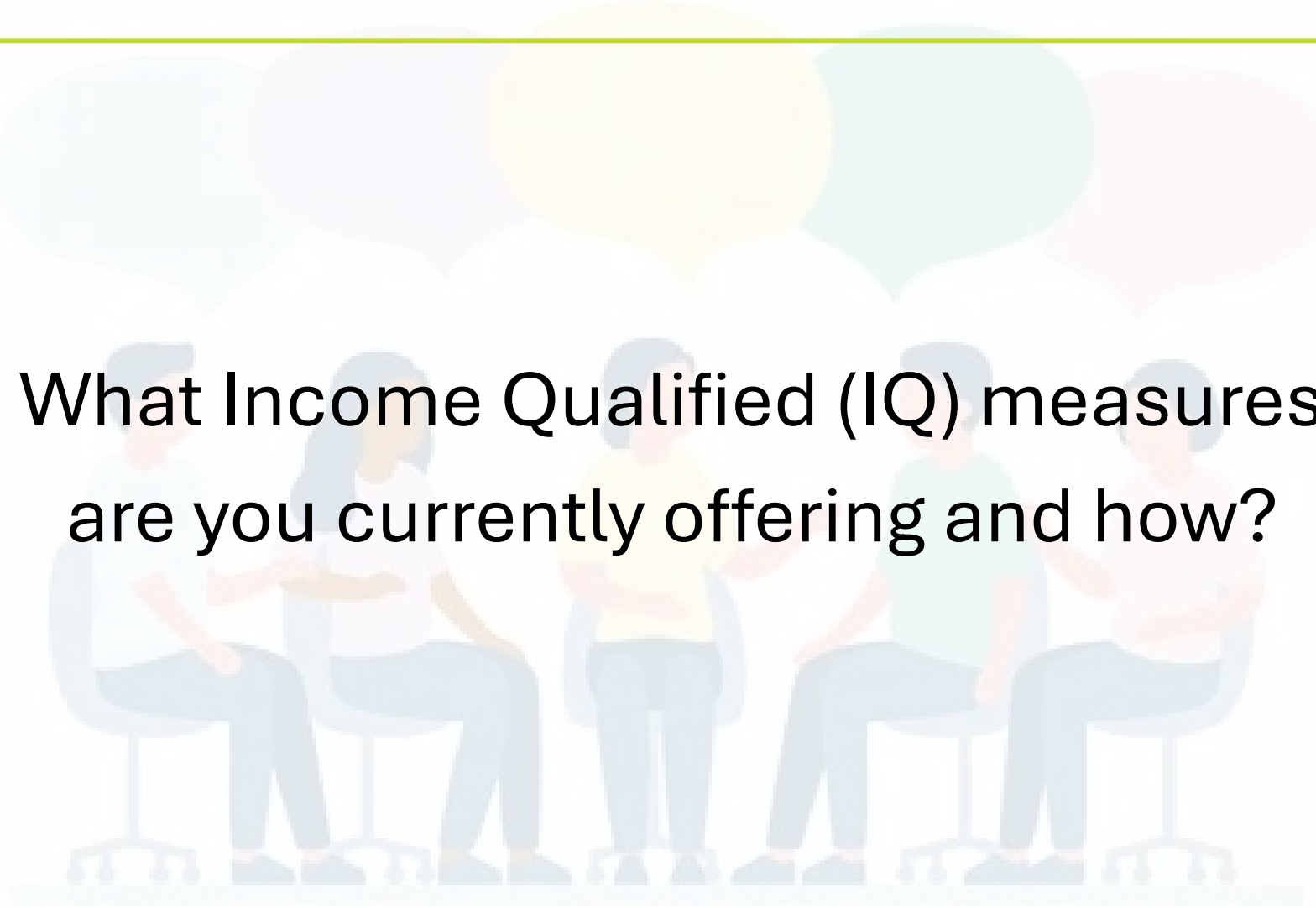




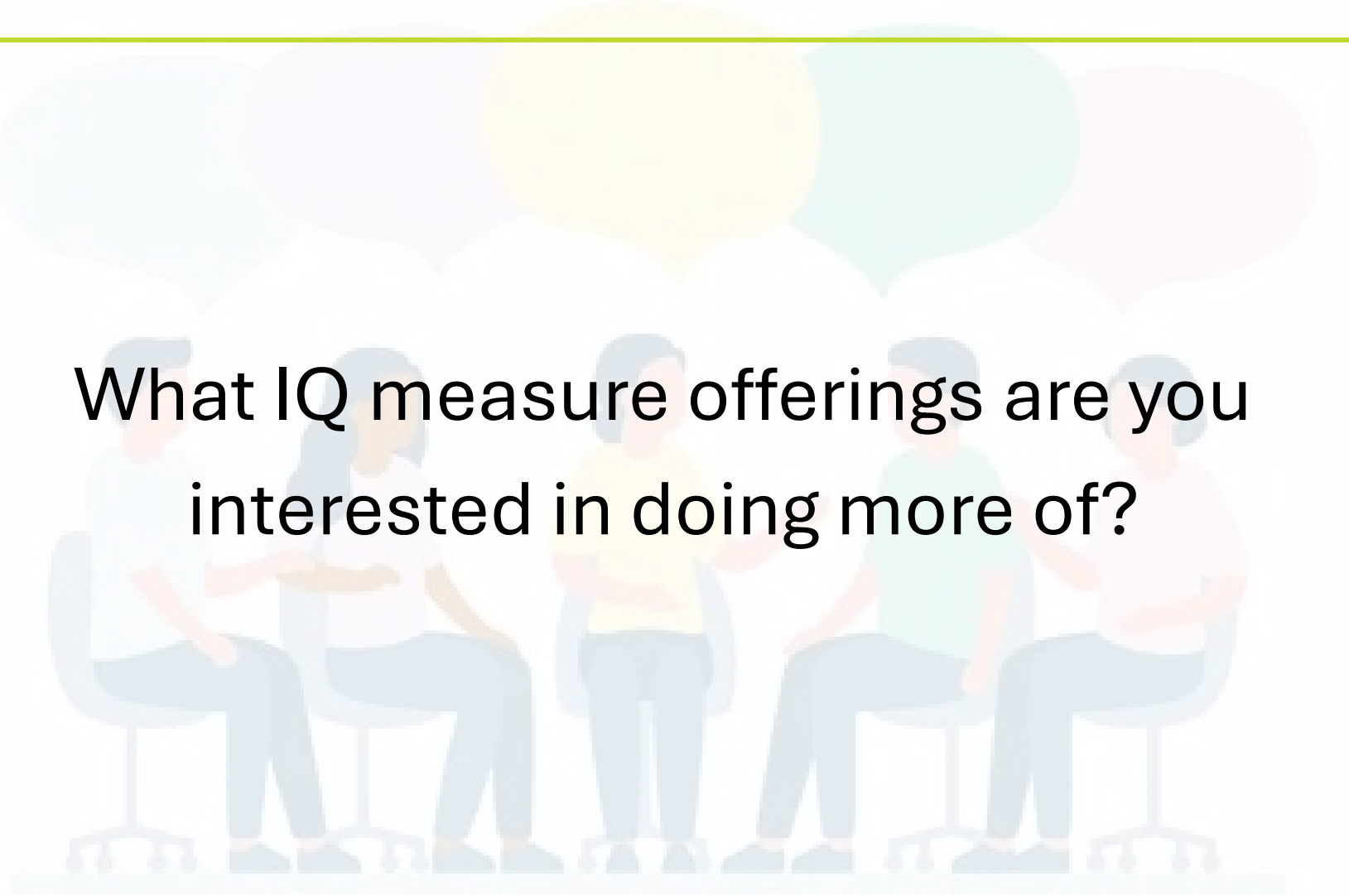
Listening Session

Discussion

What Income Qualified (IQ) measures are you currently offering and how?

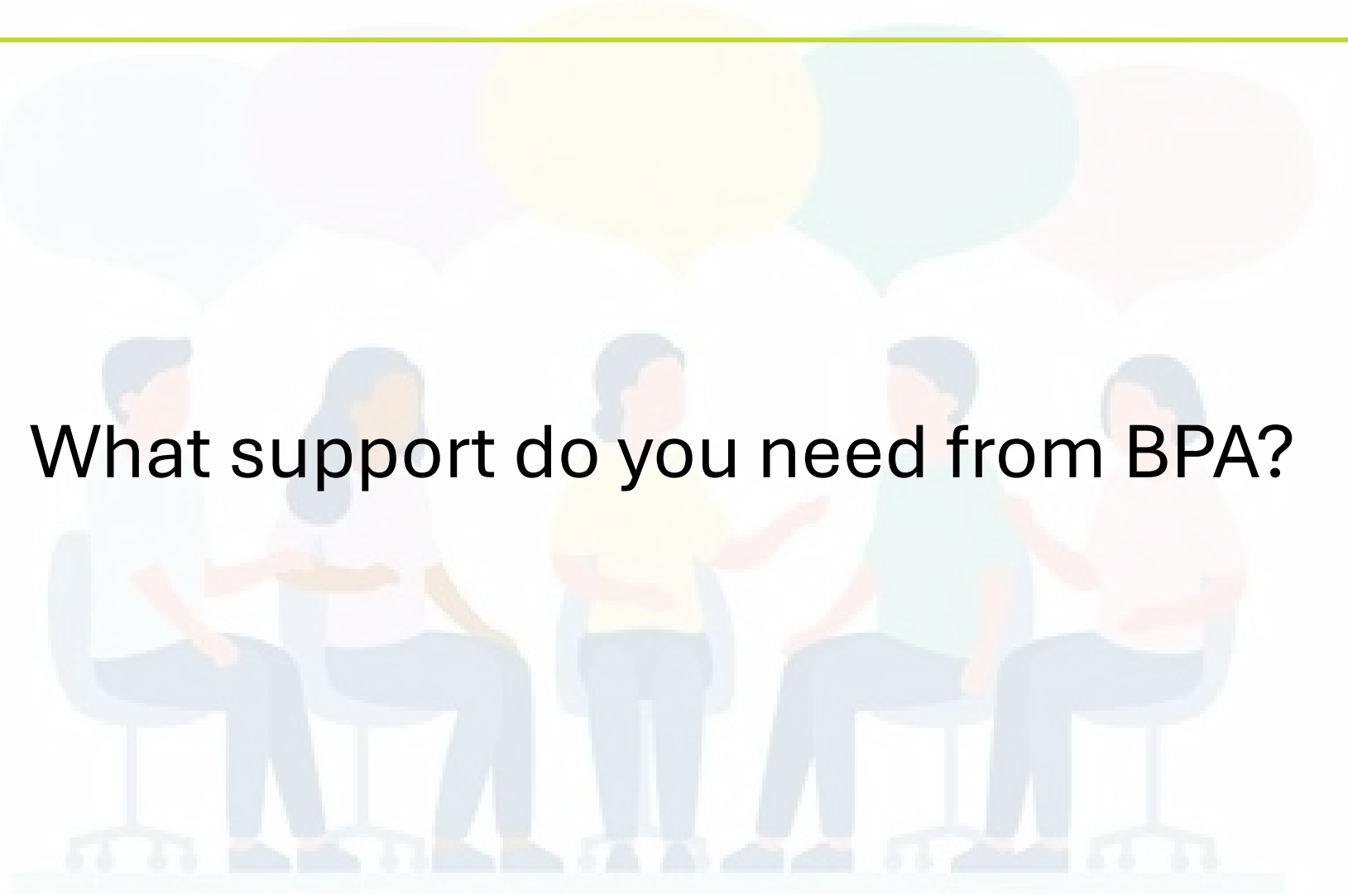


Discussion



What IQ measure offerings are you interested in doing more of?

Discussion



What support do you need from BPA?



Next Steps & Closing

Meeting Recap

- ✓ Continuing state sessions
- ✓ Creating a plan from what we hear
- ✓ Next workgroup: February(?) 2027





Thank you for joining us today!

Questions? Comments? Reach out to Amy Burke (aaburke@bpa.gov; 503-230-4364)