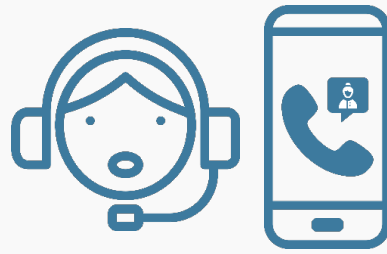


## Audio Instructions



### #1 Preferred Audio Choice: Have WebEx call you.

Audio connection

☐ Use computer audio

☒ Call me at +1

☐ Call in

☐ Don't connect to audio

**Note:** The incoming call may be listed as **POTENTIAL SPAM**.

### Second Audio Choice: Call in directly.

In the example above, instead select **Call in** and use your phone to call into the webinar. A window will pop-up with your meeting **Call in** information.

Call In

Call in from another application ⓘ

- Call**  
US Toll  
**+1-415-XXX-XXX**  
[Show all global call-in numbers](#)
- Enter**  
Access code **XXX XXX XXXX #**  
Attendee ID **XXXXXX #**

**Last Audio Choice: Use computer for audio.** Connect a headset to your computer for the best results.

# Welcome to BPA's Low-Income EE Workgroup! Webex Meeting

Note: Your audio is muted upon entry.

Viewing BPA Computer's ap...

BONNEVILLE ADMINISTRATION

**PRESENTATION**

ENERGY EFFICIENCY

BPA

Mute Start video Share Participants Chat

Use to mute and unmute

Use to express emotion

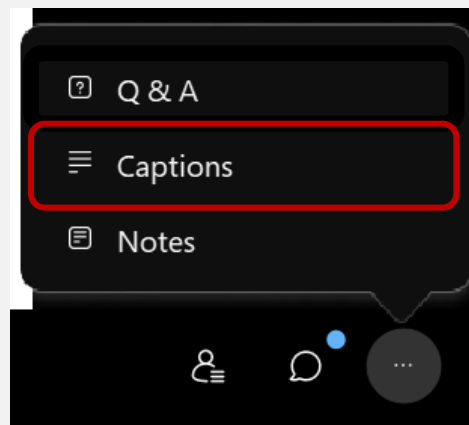
Use to view participant list and chat panel



# WebEx Accessibility Options

## To enable Closed Captions

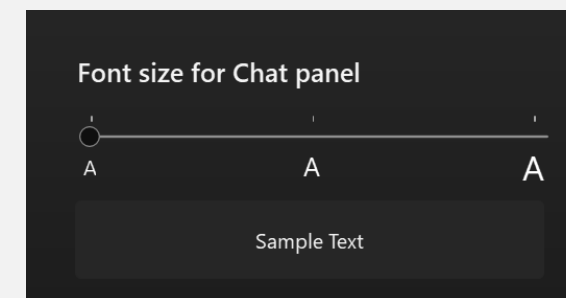
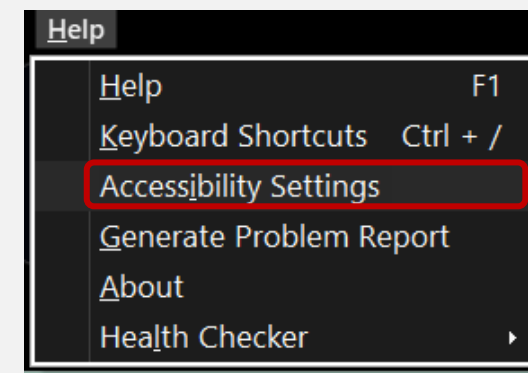
- **Option 1:** Select CC icon in the bottom left-hand corner of the WebEx screen.
- **Option 2:** Select the ellipses on the bottom right-hand side of the WebEx screen and select “Captions”.



*Note: CC is set by individual users who want to use them. CC text doesn't always match exactly.*

## To Change Font Size

1. In the “**Help**” menu, select “**Accessibility Settings**”.
2. Move the circle on the slider to the desired font size.





# **BPA Northwest Low-Income Energy Efficiency Workgroup**

*May 1, 2024*

*Hosted by Bonneville Power Administration*





# *Welcome*

Amy Burke

Lead, BPA Low-Income Energy Efficiency



# *Opening Remarks*

Margaret Lewis

Manager, BPA Energy Efficiency Programs





# Agenda

- Purpose
- Attendee Introductions
- Setting Expectations
- Steering Committee
- Looking to the Future: BPA Update
- General Discussion
- Closing: Next Steps



# ***BPA Low-Income Energy Efficiency***

***Mission:*** *Public interest funding aimed at providing access to energy efficiency across the Pacific Northwest at low or no cost to qualifying residents.*



# Structure and Organizing Principles: BPA Northwest Low-Income Energy Efficiency Workgroup (updated May 2024)



<https://www.bpa.gov/-/media/Aep/energy-efficiency/low-income-energy-efficiency/BPA-LIEE-Workgroup-Charter.pdf>







# So Many Players...





**Please introduce yourself!**

*Name*

*Organization*

*Position*

*Washington Oregon Idaho Montana Nevada / Wyoming  
/ California Multistate BPA*

# Setting Expectations



# Setting Expectations: Survey Highlights

## *Responses from 65 participants*

- Variety of participants:
  - ✓ 51% from **Utilities**
  - ✓ 29% from **CAPs**
  - ✓ Remaining 20% from **government, non-profits, and implementers**
- 86% **have a low-income program**
- 52% are **new to the BPA low-income workgroup**
- 53% prefer **quarterly, hybrid meetings**; 47% prefer **2 – 3 times a year**



# Setting Expectations: Intended Format

- BPA program updates as needed
- Open discussion to collaborate on issues and highlight achievements
- Speaker presentations
- Technical trainings
- Discussions on program design
- Cross-agency collaboration
- Breakout sessions and small-group discussions when possible





# Setting Expectations: Intended Format

- Host at least three workgroups a year
- Host in-person with a virtual option where possible, coinciding with existing in-person meetings to decrease travel
- Host every other meeting in Portland and remaining meetings around the region

*Efforts will depend on available staff resources and meeting spaces with hybrid meeting options.*





# Setting Expectations: Respectful Discourse

Keep an open mind and be respectful.

Know that we are all working toward a similar goal.

Be open about what issues you are facing.

Don't shy away from sharing your insight.

Remember to mute when not talking.



# Setting Expectations: Most Mentioned Topics

Utility & CAP Partnership	Community Outreach Ideas
Collaboration & Program sharing	Contractor QA/QC Enforcement
Energy Burden	Data Sharing Opportunities
Income Verification Improvements	Health & Safety Challenges & Funding
Workforce Development & Lack of Available Contractors	Multifamily Implementation
Additional Funding Opportunities (State, Federal, & Grants)	New Low-Income Measures Options

# Setting Expectations: Additional Mentions

Audit Home Visits	PIPs	Property Owner & Tenant Issues
Bill Assistance	Fuel switching	Rising Costs
CAP Admin Fee Coverage	HUD-Code	SIR Calculations & Priority Lists
Client Education	Incentives: BPA Offer vs. Utility Offer	Small Rural Low-Income Programs
Contractor & CAP Partnership	Income Levels	Technical Discussion: Heat Pump Installations
Contractor Dispute Resolution	Liability & Maintenance Issues	Updating Incentive Levels
Direct Install	Membership Challenges	
DOE WAP Latest News		

***Actively building a pipeline of topics...***

# Workgroup Steering Committee





# Steering Committee

**Purpose:** *Small, balance committee of peers to help guide the direction of this workgroup to ensure it is effective and valuable.*

- Small, balanced committee made up of utilities, CAPs, and other interested parties
- Participation is voluntary
- Commitment is for one year and can be renewed
- Additional 4 – 6 one-hour meetings per year
- Tasks include but aren't limited to:
  - ✓ *Providing input on agenda items*
  - ✓ *Prioritizing discussions*
  - ✓ *Identifying speakers*
  - ✓ *And more...*
- Additional information in the [Low-Income Workgroup Operating Principles](#)

# Steering Committee

- Excellent opportunity to help shape this forum!
- **Six** open positions: **Three** Utility & **Three** Non-Utility
- Soliciting volunteers to participate now
- BPA will follow-up with the eligible survey participants who expressed interest
- **Deadline** to fill open positions **is May 31<sup>st</sup>**

Volunteers Needed



# BPA Program Updates



# Quick Pause: BPA Caveat

*BPA establishes minimum requirements for its energy efficiency measures. Customer utilities, states, and tribes implementing BPA funding have final say on what measures they offer and at what incentive level. They frequently include additional requirements to satisfy internal policies.*





# New Deemed Measures Effective April 1, 2024

## **Low-Income Ductless Heat Pump in Multifamily**

- Available for low and mid/high-rise multifamily buildings
- Payment cap is dollar-for-dollar up to \$6,000 per installation
- Follows existing technical, installation, and documentation requirements of current ductless heat pump measure

## **New Low-Income Custom Residential Project Rate**

- For retrofit residential applications only
- Custom projects payments of \$5.00/kWh or up to 70% of project cost, whichever is lower
- Excellent option for exploring new low-income projects



# Cliff's Notes: Low-Income Process Evaluation

**BPA's Low-Income** and **Evaluation teams** worked with the independent evaluators to identify opportunities to expand low-income activity through EEI-funded utility programs.

- Final report and corresponding BPA response memo posted to be soon
- Report will include information on:
  - BPA program and uptake analysis
  - Utility and CAP interviews
  - Best practices and national literature review
  - Demographic analysis
  - Analysis on savings potential



# Cliff's Notes: Low-Income Process Evaluation

**Seven primary findings and recommendations from the Evaluator,**  
including but not limited to:

- Discussing how payment cost caps impact program uptake
- Considering if a whole-home measure option could be made available
- Updating elements of the program to improve reporting
- Improve how utility and grant funding sources are designed so they don't conflict with each other
- Consider updating program elements to expand outreach
- Improve regional collaboration
- Suggested additional measure development



# Cliff's Notes: Low-Income Process Evaluation

Goal: Post both the final evaluation report and BPA response memo to the [BPA Energy Efficiency's Evaluation webpage](#) this month.

Next steps for these findings and recommendations:

- Prioritize efforts internally through a strategy process
- Discuss priority topics with the Low-Income Steering Committee and ultimately the larger low-income workgroup
- Determine how to move practical solutions to some of these larger issues forward



# General Discussion





# Open Discussion

What topics do you and your organization want to see addressed?



# Open Discussion

What outcomes do you want to see  
from this Workgroup?

What does success look like to you?

# Open Discussion

What changes is your organization incorporating that you think others could learn from or incorporate?

# Open Discussion

What questions do you have for  
others in this group?

# Closing: Next Steps





# Next Steps

- Recap of possible priorities for the next Low-Income Workgroup
- Estimated dates for future meetings:
  - ✓ June or July 2024 to start having some more detailed discussions
  - ✓ October/November, corresponding with utility roundtable meetings if possible
- This meeting's agenda, PowerPoint, and follow-up notes will be posted on the [Low-Income EE website](#) within the coming week
- New attendees will be added to the Workgroup mailing list; opt out at any time by emailing Kirsten Midura at [KMMidura@bpa.gov](mailto:KMMidura@bpa.gov)
- Connect with BPA staff at the upcoming Efficiency Exchange (Spokane, May 2024) and later at Energy OutWest (Austin, August 2024)



# Next Steps

## **May 31<sup>st</sup> Deadline to Fill Steering Committee Positions**

If you haven't already indicated you're interested in participating,  
please email Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov).

# Questions or Comments?

Contact Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov) or call 503.230.4364.

BPA customer utilities can reach out to their EER.





*Thank you so much  
for your time!*

