

# BPA's Northwest Low-Income Energy Efficiency Workgroup

January 23, 2025 | 9:00am – 2:30pm (PST) | Hosts: BPA LIEE Team & Frankling PUD

## Logistics

Hosts: Low-Income Energy Efficiency Team & Franklin PUD

In-Person Location: **Franklin PUD Auditorium** at 1411 W Clark St, Pasco, WA 99301  
*[See email Outlook invite for map of parking and building entrance]*

WebEx Information: [Click here to join from the meeting link](#)

### Options for Joining Audio (pick one):

- Have WebEx call your phone (**preferred**), or
- Use your computer audio, or
- Call in using the following information:
  - +1-415-527-5035 United States Toll
  - (Access Code) 2820 624 1760
  - (Password if requested) fyDg5utA@93

**Notes:** Only use one audio option to prevent feedback; all attendees will be muted on entry

Having issues joining? Contact Rachelle Powers ([rapowers@bpa.gov](mailto:rapowers@bpa.gov)) or Jesse Largent ([jillargent@bpa.gov](mailto:jillargent@bpa.gov))

Implementation: Dena (monitoring chat), Jesse Largent (notes), Rachelle Powers (WebEx troubleshooting)

## Agenda

### Optional Coffee & Networking

#### Welcome & Introductions (Amy)

- Safety & Logistics for Onsite Visitors
- Roll Call
- Amy provided links to the reference list document and a quick overview

#### Name Change Roll Out (Amy)

- Amy provided a review of the program name change and reasons behind moving from Low income to Income Qualified
- Change effective October 2025 – Change notice in April 2025
- **Anticipated impacts**
  - UES REFNO names – Just an update to the names
  - Implementation manual – replace in all sections
  - State and tribal grants – titles and references
  - BPA Website – References to program
  - Marketing materials – References to program
  - Workgroup title

### **Comfort Ready Home: Contractor Outreach** *Speaker: Cyrus Collins*

- Cyrus provided an overview of the Comfort Ready Home program for the workgroup
  - Review of regions served
  - Overview of website and its resources
    - Contractor search function
  - Expansion of contractor network
    - Typically add ~5 contractors a month
  - Contractor trainings
    - Hold approximately 10 a year
    - Various technologies included
  - Low Income support
    - Assistance in finding contractors
    - Coordinating with Local CAAs
    - Templates for low-income forms
    - Translation services
  - Cyrus provided his email for further outreach:
- Comfort Ready homes also offers support for regional contractors

### **Q&A**

- Tri-City training - How many contractors and where?
  - Aiming for 20-25 trainees
  - Partnering with REFCO
  - Have not settled on tri-cities location
  - A note will go out with more information and Cyrus will make sure Dawn is included
- What tri-city utilities are using Comfort Ready Home?
  - Cyrus to get back to Dawn with these details
- Is there a fee for the training
  - No fee for trainings
- what is the rough % of contractors focused on integrated HVAC & DHW and WX measures as a package?
  - Heavier on HVAC but big push for HPWH
  - A few contractors that can offer the full package and they tend to be located in the Seattle and Portland metro areas
- Is there a list of low-income project contractors?
  - Not currently
  - Possible idea for later implementation
- A request for more communication to utilities from Comfort Ready Homes about presence in tri-city area
  - Important to have utilities to sit down with Aaron from Comfort Ready Home and work together to align work

- Trainings are tech related and focused on broad best practices
- REFCO made the request for the technology training
- How would Comfort Ready Home be able to help CAP agencies?
  - Many CAP agencies are short contractors
  - Prevailing wage mandate is a barrier
  - Comfort Ready homes can help facilitate conversations
- Who inspects the work done by contractors?
  - Based on utility and CAP doing the work
  - Comfort Ready Home does not get involved in inspections
- Noted that Tri-cities area has an abundance of contractors and attempts to network could be fruitful

## Break

### **Income Qualification Guidance** *Speakers: Amy Burke (BPA), Jeff Feinburg (SnoPUD), Thomas Elzinga (Central Electric)*

- BPA Policy Overview -Provided by Amy Burke
  - Provided the standard caveat around State and utility low-income guidelines provided
  - Link to implementation manual provided in Slides
  - BPA – 200% of federal poverty line OR “Approved” state or tribal guideline
    - BPA does not need to do additional review if state or tribal guidelines are used
    - Pushback from BEETS – The IM includes this list
  - Documentation requirements
    - Documentation that verifiable source was reviewed and approved
    - Programs should establish their own policy for recertification standards of income qualification
    - Self-attestation forms for income – Link in slides
      - BPA can receive DocuSign on this form
      - Form can be customized
      - Has list of agencies that are allowed
    - Clarification coming in the next year on income qualifying a multifamily building – 50% of building
      - Projects can be done for individual units within a building – not required to qualify the entire building
      - Shared spaces can be included in whole buildings qualified

### **Utility share-out of their policy and process**

- Jeff Feinburg - *SnoPUD*
  - Jeff provided an overview of SnoPUD’s program and provided slides
  - Provided overview of Impact of CETA on program
  - Overview of three phases of program
    - Phase 1: Refine

- Phase 2: Data informed Program
    - Get the story behind who is being served or not served and why
  - Phase 3: Marketing and outreach
- **Q:** How do you pay for the 50% discount?
  - Figured into annual budget. Balanced In reduction of other administrative problems such as disconnects etc.
- Thomas Elzinga - *Central Electric CO-OP*
  - 1 CAP that serves them – Not able to assist them as a utility directly as much
  - Service area is not a contiguous area
  - Income qualified program is a high touch program that involves visiting each home
  - Whole home energy audit and retrofit
  - LIHEAP notification as flag for outreach
  - Uses BPA form
  - Simple program due to budget constraints and size

#### Discussion

- Dawn offered to share out their income qualification process
- Sustainable living center as an organization that does certification for Franklin – Monthly fee – done online with a direct link
  - Pre and post inspection while onsite – can upload document while with customer
  - Offer to have customers come in and assist for tech problems
- Possible to do in person as well
- CAC – can register online but must get certified online
- Benton does all qualifications in house
  - Did it through sustainable living for several years but about a year ago decided to move this in house
- Question around providing documentation
  - Only needed for oversight and BPA does not want any PII
  - Documentation that someone at the utility did review
  - BPA does have policies regarding PII but prefer to keep it in utility hands
  - Teri at Flathead would be happy to share out a form they use

#### Lunch

**SIR (Savings-to-Investment Ratio) Discussion** *Speakers: Ken Robinette (ID South Central CAP), Jesse Bennett (King CO Housing Authority), Jen Langdon (Cowlitz PUD)*

- Overview of SIR Calculations and deemed measure installations and how they impact CAP agency work, wait times, and interactions with utilities
- Highlight examples of utilities and CAPs collaborating successfully using the priority lists, deemed measures and SIR calculations

- Ken Robinette - *ID South Central CAP*
  - 1100 CAAs across the US
    - (CAP AND CAA same thing, CAP was a renaming that was more accurate)
  - SIR – simple heat savings calculation (101 for weatherization)
  - Simple payback (SIR of 1 or greater)
  - Provided review of formula for calculation of SIR and used Idaho power cost per kwh for example
  - The more efficient your heating system is the less you'll get back on other measures you put in
  - Material cost can be a big factor that changes
    - High costs in HVAC and Insulation
    - Raising costs of labor
    - Insurance costs
  - Life of the measure can impact calculations
  - When you add one measure it will impact other measures
  - Modeling software: ECOS, NEAT
  - Measures that get SIR on their own and SIR when they are included as a package (interactivity)
  - There is pre & post testing for analysis on projects
  - When you do your audit – if a measure has already been put in place you take the efficiency of the heat system in place
    - Model the home in the state it exists in
    - This is where DOE priority or deemed measure list comes into play
  - **Q:** Is there a way to document what was seen when an organization went into the house versus what was done after?
    - Partnership and doing work at the same time is ideal
    - Some utilities ask the CAP to come in
  - Noted an Issue around ductless heat pumps being put in and tanking an SIR rating so no other work can be done.
  - **Q:** Not using admin fee? Why wouldn't someone include the admin fee?
    - East coast orgs do include admin in SIRS for overall package
    - An example: Including admin fee into one project Versus Spreading admin across all of work not just one project
  - **Q:** For DOE, does the SIR need to be 1 or greater?
    - Yes, the SIR does need to be 1 or greater for DOE
    - WA has a fund matrix that they use for what source to use for projects
    - SIR can be limiting for a CAP agency but isn't restricting for the utility – a way to incorporate the utility auditor in the CAP conversation
- Jesse Bennett – *King County housing authority/ weatherization*
  - Background:
    - Jesse is the Project Manager for weatherization team,

- Works exclusively on multifamily
- Does not hold to the DOE MF definition – has quadplexes etc..
- Tacoma, SCL main utilities
- Uses priority measure list, SIR and BPA deemed measure list
- Description of work:
  - Does energy model of all buildings
  - Will use state deemed priority measure list
  - Work with admin team to set aside funding for work needed to be done
  - Use tariff amounts for specific projects
  - Aero barrier project for large efficiency gains
    - Balance of ventilation
  - Micheal Lubliner as potential future presenter on aero barrier project
- DOE priority list
  - Look at the area and the funds availability
  - Typically use the State of Washington priority list
  - DOE money is usually spent with an SIR
- **Q:** How do you interact with your utility with their deemed priority list?
  - Must go through Seattle office of housing – they have to approve and have funding in their budget
  - Prefer to use BPA Funds in that region because they can include admin costs
  - BPA does have cost caps but can have that be a utility buy down
  - Utility buy down – use utility funds on top of other contributions
- **Q:** What opportunities for improvements do you see for incorporating BPA deemed measures?
  - Addressing admin fees – deemed measure cost cap
  - SIR process to work with BPA too
- Andy Etue – *Seattle City Lights*
  - DOE priority list as step in the right direction – not perfect
  - Deemed measure list based of RTF data but can't use DOE funds in it
  - Link to fund matrix and deemed measure list in the chat
  - Deemed measure list applicable to the whole state
  - DOE priority list is applicable to whole state
    - Break up by climate regions (east versus west isn't exactly even)
  - A CAP rep noted on their funding matrix they have spending priorities, if they receive utility funds they use those first before other sources
  - **Q:** Do you ever not convert to a heat pump because you can't get the SIR then?
    - If a home needs a new heat system, probably wouldn't use the DOE priority list on that home,
    - Have other ways of funding that project
    - Can phase work – do the SIR and then do it as a second phase of work

- Upgrading to heat pumps on units with base board etc.. becomes prohibitive because of HVAC work needed
- Jen Langdon – *Cowlitz PUD*
  - Long relationship with local cap
  - Aligns with BPA fundings
  - Allows to fund weatherization on mutual customers
    - Hasn't run into payment funding issue because of this contract
  - Cowlitz took on funding ductless heat pumps in Income qualified homes
  - homes referred to them by CAP and houses they found as well
  - When HVAC was updated provided that to CAP – on going communications so we don't step on their toes

**Breakout Discussion** (*Facilitators: Melissa Podeszwa, Phillip Kelsven, Lindsey Hobbs*)

- Discuss examples of utilities and CAPs that have challenges with blending SIR and deemed measure installs
  - What have your experiences been with blending SIR and deemed measure installs?
  - Have you had successes or found ways to streamline or use this process that you would like to share, or that others could benefit from?
  - How can the use of DOE priority lists support both utility and CAP agency processes better?
- Notes:

**Overview**

**Melissa**

- Challenges with different deadlines for various programs
- Keeping in touch and staying on the same page
- Challenge on how to know what approved measures are and how to get reimbursed – timing for reimbursement
- Suggestions: making sure getting back to folks on specifications – is there an opportunity for a non-standard approval in IQ?

**Lindsey**

Utility Perspective:

- Repair costs are a problem (expensive).
- Manufactured homes are a problem (expensive).
- How do we work together to complete a home where measures cannot be split with funding.
- Reporting issues with CAPs making claiming EEI with BPA difficult.
- Utility works faster than local CAP who has limited staff and can only complete so many homes per year.
- One local CAP does not want any more utility funding.

CAP Perspective:

- Get the audit done on the house and then decide on the upgrades.
- They get as much funding as they can and braid the funds using utility funds first but not being able to split a measure can be a challenge.

- Increasing project costs are getting difficult to complete a measure using BPA incentives, meet SIR requirements.

#### AMY

- Cap and utility relationship challenges – who serves specific residences and who serves them
- Identifying the ideal of cap and utility relationship set up – BPA looking at guidance on how to better use BPA funds
- Value in multiple entry points for bill assistance – holistic approaches

#### Jesse

- Challenges exist more in the resource constraints not on CAPs or utilities
- Importance of cap/utility relationship
- Ongoing communication is important
- Reimbursement challenges

#### Phillip

- Software challenges
- Marketing and how we are finding LI pops., working with other community orgs
- BPA rules that can change – repair cost not being fully explained and be good to have clarity on what can or can't be challenged

#### Break

**Loan Program Share-Out** (*Speakers: Jen Langdon, Cowlitz PUD, Haley Puntney, Inland Power*) – **PUSHED TO NEXT MEETING**

#### Open Discussion and Share Out!

- **Q:** Crawl space insulation – BPA recognizes bating insulation – will BPA recognize other crawl space insulation? (Conditioned crawl space)
  - Not currently
- **Q:** Are cost caps at a place that is where people can fund everything?
  - Windows – yes
  - DHP – Yes
  - Sometimes heat pumps too
- Opportunity For utility to work with CAP agencies – **conference Energy Out West**

#### Closing

- Priority agenda items for the next meeting
  - Nothing major listed
- Call for Ideas for facilitating virtual networking
- Estimated date for the next meeting
  - Close to EFX
- Announced Steering committee opening