

Welcome to Day One!

Hosted by Tanner Electric Cooperative

45715 SE 140th Street,

North Bend, WA 98045

Welcome and Introductions

- Tanner Electric Cooperative
- Bonneville Power Administration
- And our attendees, please share:
  - Name and Utility/Organization
  - Role in EE and how long you've been working in energy conservation





Housekeeping

- Thank you, Lisa Peabody and Tanner Electric team!
- Surveys



The State of BPA Energy Conservation

Dan James

Energy Conservation Vice President



State of the Organization – Leadership Updates

- Agency Level
  - Welcome to new Administrator, Travis Kavulla
  - Dan James: Temporary Detail—Senior Policy Advisor role
- Conservation Department Management
  - David Moody: Vice President, Energy Conservation
  - Melissa Podeszwa: Manager, Program Marketing
  - Jonathan Belmont: Manager, Internal Operations
- Guiding Focus: Core mission remains consistent; dedicated internal and regional support for all customers.

Northwest Power and Conservation Council – 9th Power Plan

- Proposed Council Changes:
  - Bifurcated targets: ID/MT vs. OR/WA
  - Significantly higher targets: 45% increase over current levels
- BPA's Concerns:
  - Would eliminate key measures in ID and MT while raising targets across all four states
  - Conflicts with BPA's principle of providing an equitable, consistent portfolio to all customers
  - Adds multi-million-dollar administrative complexity with limited incremental value
  - Increased targets unachievable
- Next Steps:
  - Second draft Power Plan released mid-December (addressing hydro modeling issues and new resource strategy)
  - Final Power Plan in Spring 2027



The 9th Northwest Regional Power Plan

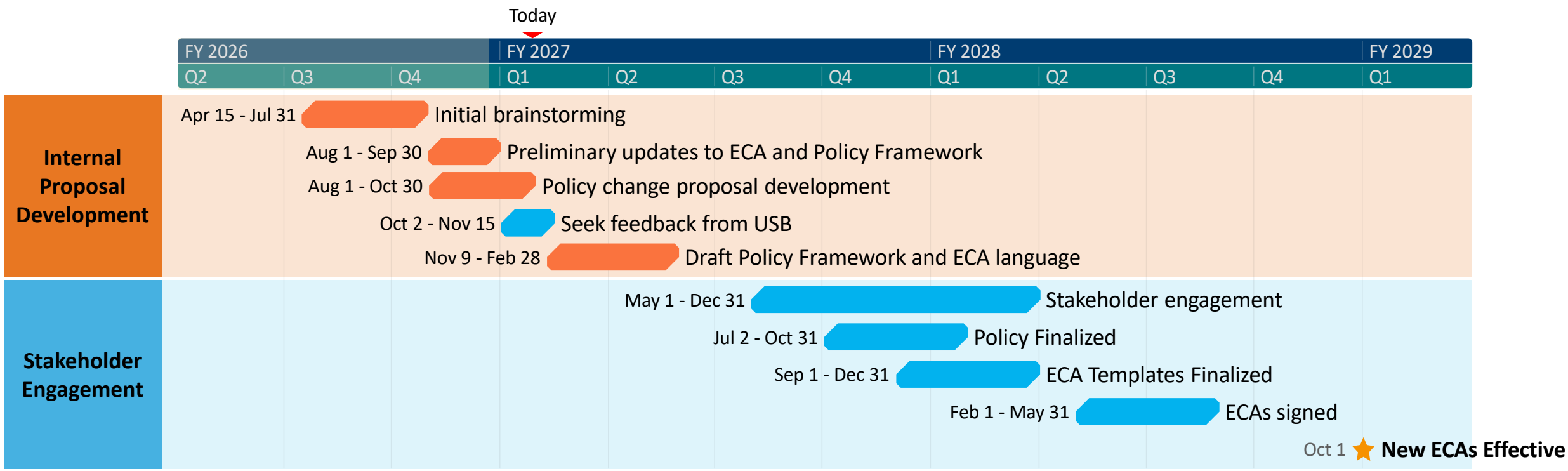
BPA Resource Program & Operational Action Plan

- Operational Action Plan:
  - Uses the Council's Plan as a baseline, filtered through implementation practicality and customer need
  - Historical alignment at the high level, with flexibility at the program/measure level
- BPA Resource Program Study:
  - Internal resourcing assessment reflecting BPA-specific system needs
  - Study completion targeted for the end of next year (2027)
  - Collaborative course corrections will be made if needed

Conservation Post-2028 (Contract Renewal)

- Upcoming Contract Alignment:
  - Transition to the post-2028 Long-Term Power Sales Agreement requires revising and renewing Energy Conservation Agreements (ECAs)
- Overall Direction:
  - **Status Quo Foundation:** The core structure of the conservation program will remain steady
  - **Continuous Improvement:** Internal workgroups are reviewing incremental enhancements
  - **Customer Engagement:** Workgroup concepts will be shared for customer input as they mature

Tentative Energy Conservation Post-2028 Timeline



Predecisional. For discussion purposes only.

Conclusion & Discussion

- Key Takeaway: Ongoing commitment to delivering a valuable, reliable resource for the region
- Open Discussion/Q&A:
  - Questions and general program feedback

Residential Sector



Residential Agenda

- Comfort Ready Home Contract
- Customer Analytics and Engagement Platform (CAEP) Pilot
- Heat Pump Water Heaters in Rural Areas

Comfort Ready Home Contract

Melissa Podeszwa

BPA Energy Conservation Marketing Manager



Comfort Ready Home

- Old Comfort Ready Home Contract
  - Ended May 31, 2026.
  - Overall Program Goals.
    - Increase regional engagement.
    - Develop resources.
    - Increase regional satisfaction with residential measures.
  - These goals carry over to new contract.



Comfort Ready Home

- Accomplishments in 2025 and 2026
  - 11 in person workshops completed.
  - 464,000 YouTube views.
  - Duct sealing training resources developed and implemented.
  - 61 participating contractors added for 575 total.

Comfort Ready Home

- New Comfort Ready Home Contract
  - Started June 1, 2026
  - Upcoming focus areas
    - Spanish versions of most popular trainings and resources.
    - Resources to increase installation quality and/or DIY.
    - Increase capacity for home energy assessments, including self-assessment.

Questions?

Thank you ☺

Behavioral Program: Customer Analytics and Engagement Platform (CAEP) Pilot

Kyla Kelsay

Public Utilities Specialist



What is Behavior-Based Energy Conservation?

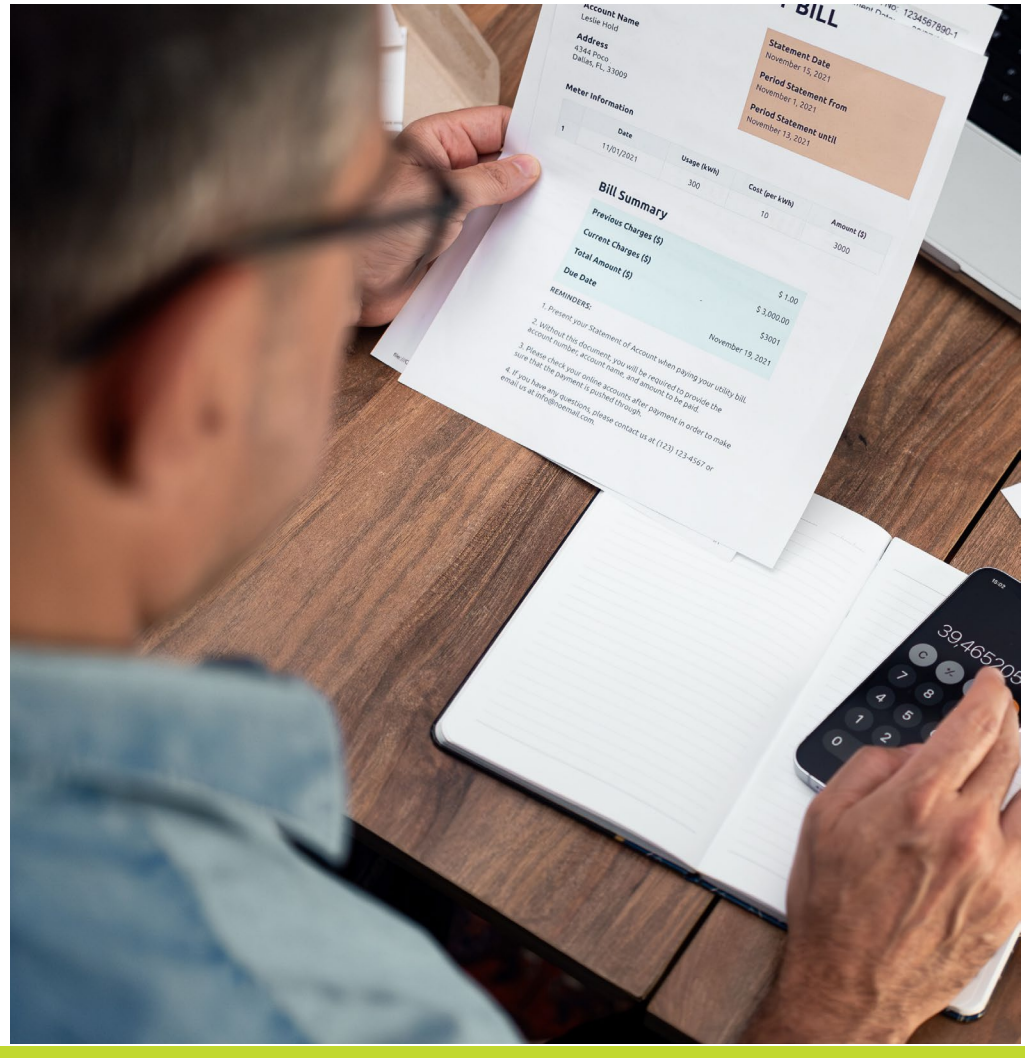
Programs that focus on energy savings resulting from changes in individual or organizational behavior and decision-making.

- Home Energy Reports (HERs) are the most common behavior-based program
- HERs are the only behavior-based UES measure

What Are Behavioral Home Energy Reports?

Mail or email communications that provide households with personalized energy usage insights:

- Tips and strategies to lower bills.
- Seasonal energy consumption reports.
- Consumption comparisons to similar households.



How Do HERs Generate Savings?

- Influences behavior of end-use customers and educates on energy conserving methods.
- Typically result in about 1% energy savings per household with sustained savings over time.
- Randomized control group (RCT) treatment.
  - Experimental design means large customer base is needed and not everyone receives the reports.

What Are Benefits of HERs?



Easy To Implement & Scale



Low-cost Implementation



Valuable Customer Engagement Tool



Bridge To Relevant Program Offerings



Help End-Users Save Money

What are limitations of HERs?

Experimental design excludes some end-users

- RCT requires a control group

Barrier to entry for smaller utilities

- Priced out due to cost/end-user model
- RCT design requires a large customer base

Customer Analytics & Engagement Platform (CAEP) Pilot

Distribution of **e-mailed** energy use reports to **all eligible end-use residential customers.**

- Emails on personalized home energy usage insights.
  - Tips and strategies to lower bills.
  - Seasonal energy consumption reports.
  - Consumption comparisons to similar households.

*Information can also populate analytics platform accessible to utilities


123 TEST AVE
Hello Jerry,
Summer is just around the corner, and we would like to help you save on your cooling costs!
Get ready for the upcoming season
We'd like to help you save on your cooling costs.
Email

123 TEST AVE

Hello, **Sumanth!**

Here are your latest energy insights!

1 Apr 2022 - 30 Apr 2022

Your Bill Summary

Total Amount

$310.01

↓ **$167**

-35% vs. previous period



Your Energy Use By Appliance

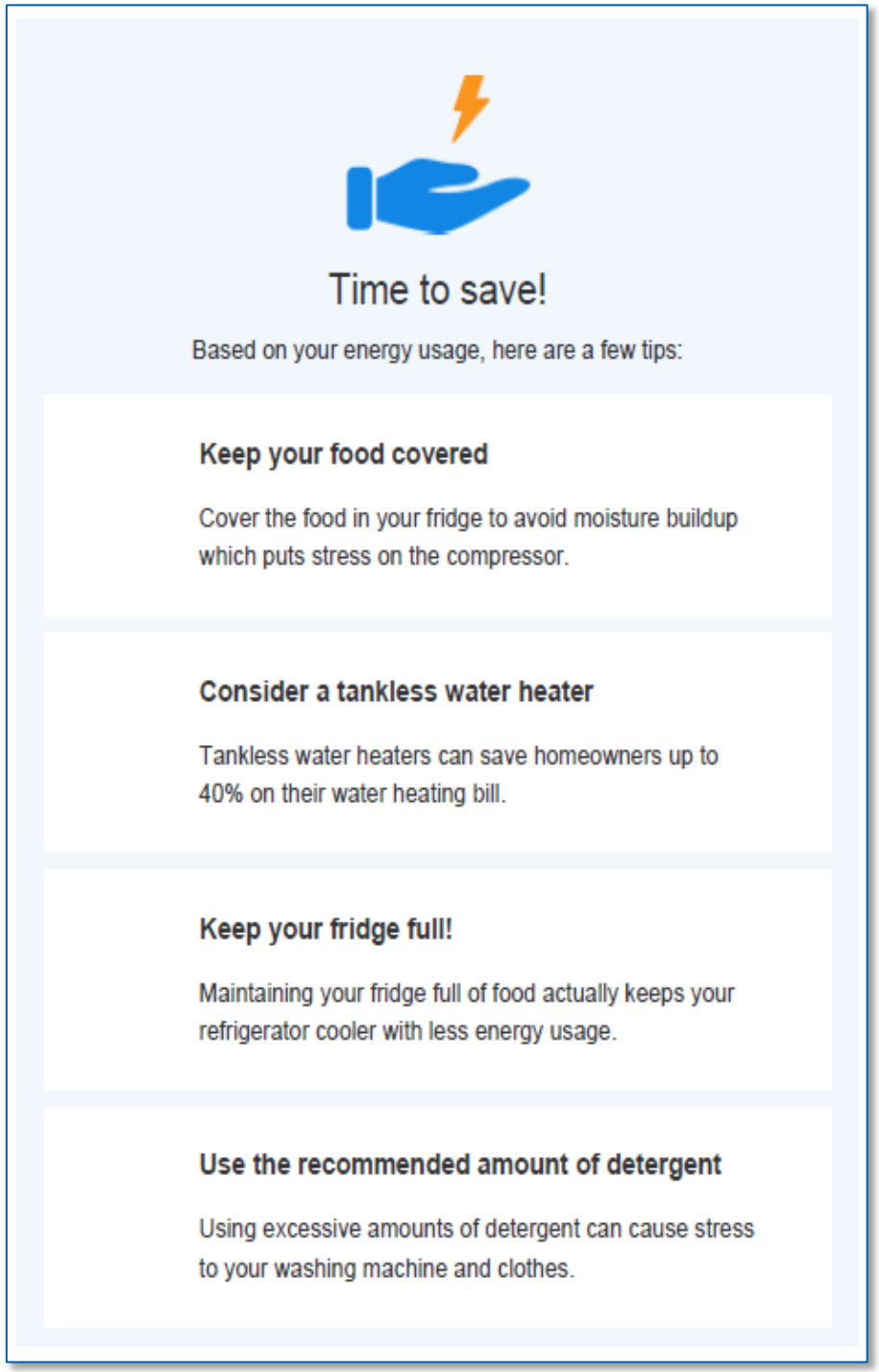
Always On	$131
Heating	$44
Entertainment	$28
Cooking	$20
Laundry	$12
Refrigeration	$12
Lighting	$5
Other	$58

EXPLORE USAGE

Buy a smart thermostat

"Learning" models can adjust the temperature automatically based on your household's activity.





Time to save!

Based on your energy usage, here are a few tips:

Keep your food covered

Cover the food in your fridge to avoid moisture buildup which puts stress on the compressor.

Consider a tankless water heater

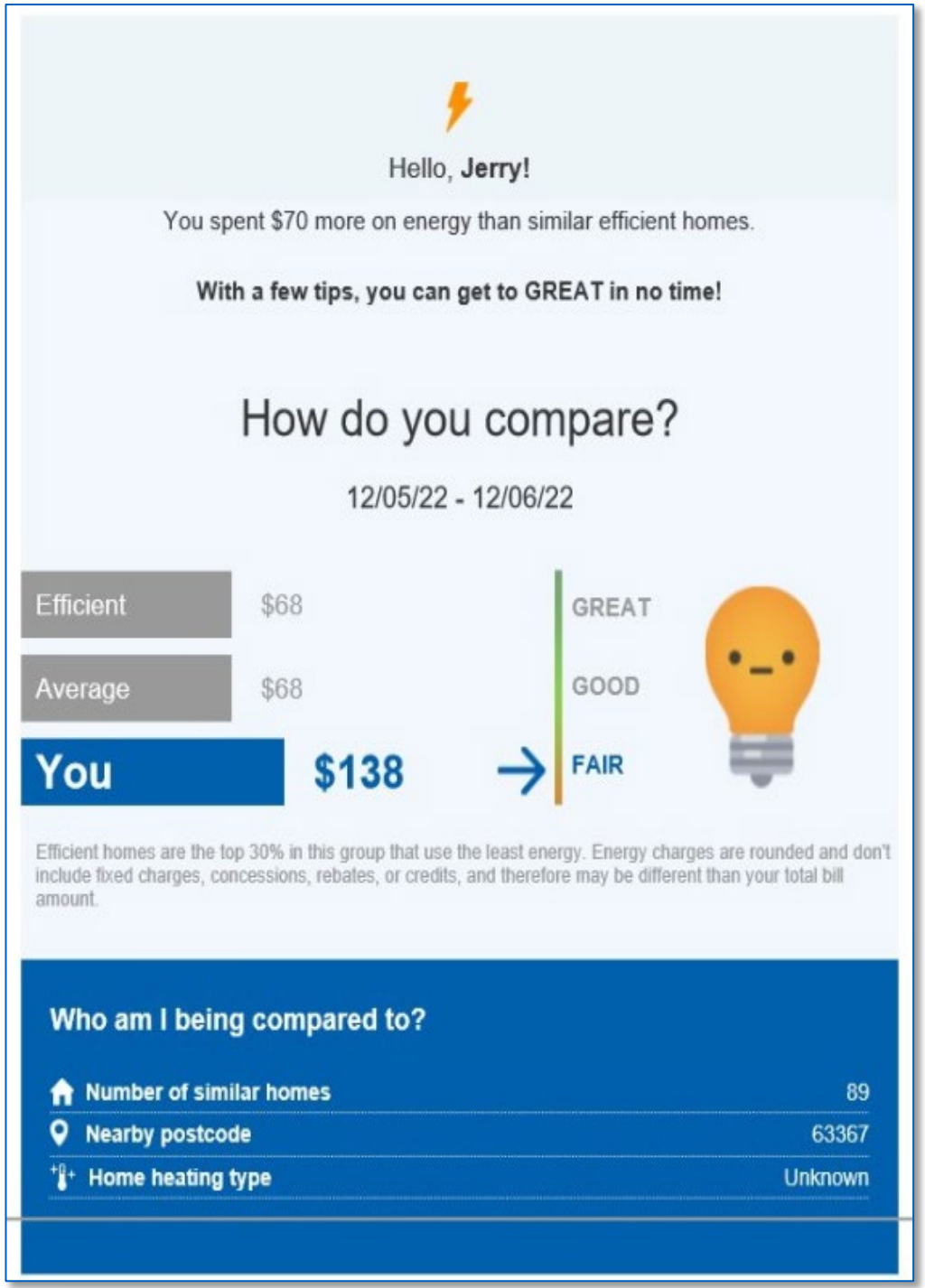
Tankless water heaters can save homeowners up to 40% on their water heating bill.

Keep your fridge full!

Maintaining your fridge full of food actually keeps your refrigerator cooler with less energy usage.

Use the recommended amount of detergent

Using excessive amounts of detergent can cause stress to your washing machine and clothes.



Hello, **Jerry!**

You spent $70 more on energy than similar efficient homes.

With a few tips, you can get to GREAT in no time!

How do you compare?

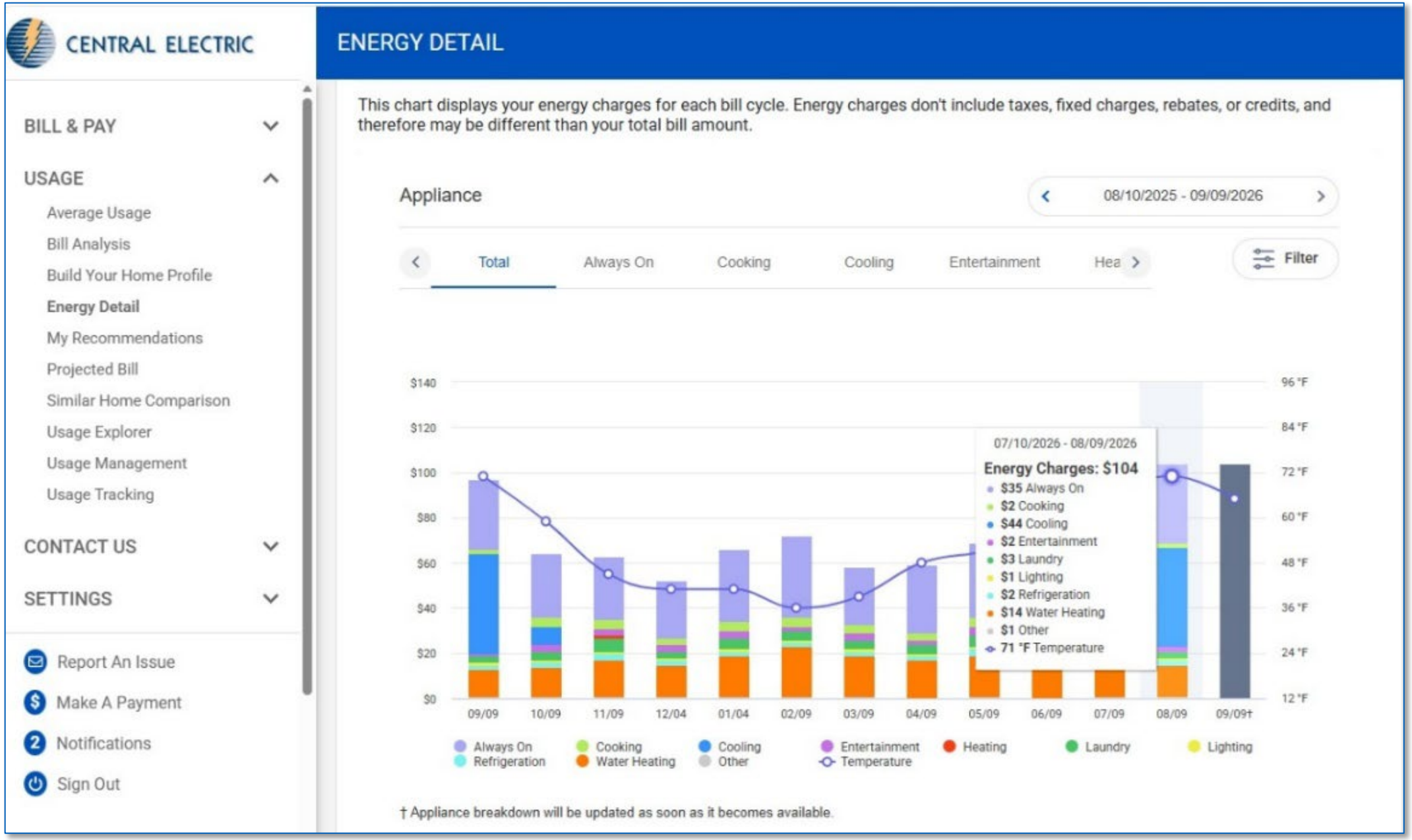
12/05/22 - 12/06/22

Efficient	$68	GREAT
Average	$68	GOOD
You	$138	FAIR

Efficient homes are the top 30% in this group that use the least energy. Energy charges are rounded and don't include fixed charges, concessions, rebates, or credits, and therefore may be different than your total bill amount.

Who am I being compared to?

Number of similar homes	89
Nearby postcode	63367
Home heating type	Unknown


CENTRAL ELECTRIC
ENERGY DETAIL
BILL & PAY
USAGE
Average Usage
Bill Analysis
Build Your Home Profile
Energy Detail
My Recommendations
Projected Bill
Similar Home Comparison
Usage Explorer
Usage Management
Usage Tracking
CONTACT US
SETTINGS
Report An Issue
Make A Payment
Notifications
Sign Out
This chart displays your energy charges for each bill cycle. Energy charges don't include taxes, fixed charges, rebates, or credits, and therefore may be different than your total bill amount.
Appliance
08/10/2025 - 09/09/2026
Total
Always On
Cooking
Cooling
Entertainment
Hea
Filter
$140
$120
$100
$80
$60
$40
$20
$0
96 °F
84 °F
72 °F
60 °F
48 °F
36 °F
24 °F
12 °F
07/10/2026 - 08/09/2026
Energy Charges: $104
$35 Always On
$2 Cooking
$44 Cooling
$2 Entertainment
$3 Laundry
$1 Lighting
$2 Refrigeration
$14 Water Heating
$1 Other
71 °F Temperature
09/09
10/09
11/09
12/04
01/04
02/09
03/09
04/09
05/09
06/09
07/09
08/09
09/09†
Always On
Refrigeration
Cooking
Water Heating
Cooling
Other
Entertainment
Temperature
Heating
Laundry
Lighting
† Appliance breakdown will be updated as soon as it becomes available.

Key Differences

Home Energy Reports	CAEP Pilot
Distributed via mail or email	Distributed to all eligible end-use customers with email
Utilizes control group for randomized control trial (RCT)	Does not utilize control group or randomized control trial (RCT)
Implementers have minimum end-user population requirements	Opportunities to work with smaller end-user populations

Value

End-use customers

- Enhanced insights into monthly electric bills
- Personalized, actionable tips and strategies on how to reduce energy consumption and save $$
- Information about additional rebate programs
- Brand new offering

Utilities

- Easily scalable to **all** residential customers with email
- Low cost (at scale)
- Bridge to additional, complementary residential program offerings
- Customer engagement and opportunity to add back-end analytics

Costs and Savings

- Anticipate first year set-up fee, followed by ongoing subscription costs
- 100 kWh/year deemed savings per household
- EEI Custom Program Payments: IM page 17
- Performance Payments: IM page 6

5.1 Custom Programs Payment Rate

The total BPA will pay for an Evaluated Custom Program, or project within an M&V Custom Program, is equal to the lesser of (1) the BPA payment rate ($/kWh), or (2) 70 percent of the documented project cost.

The applicable BPA payment rate ($/kWh) is the rate in place at the time of Evaluated Custom
the start date for a project within an approved M&V Custom Program. BPA calculates payment
Custom Projects Payment Table located in section 4.1 and shown below.

5.1 Custom Programs Payment Rate Table

Project Type	Measure Life (Years)	Sector*	Pa
Nonresidential Lighting	All	Agricultural Commercial Industrial	
New or Retrofit Construction (Excluding Nonresidential Lighting)	1	All	
	2-3	Agricultural Commercial Industrial Residential	$0.06
	4-19	Agricultural Commercial Industrial Residential Utility Distribution	
		Whole Building New Construction** Commercial Industrial	
	20+	Agricultural Commercial Industrial Residential Utility Distribution	
New Construction	45+	Residential	
Income Qualified Retrofit	All	Residential	

Savings must be reported separately for each sector.
***The Whole Building New Construction payment rate must include more than a single measure, otherwis*
payment rate is $0.33 per kWh. Eligible costs include measure costs (incremental measure costs, operati
costs) and program costs (implementation, evaluation, and M&V).

Customers may request less than what BPA is willing to pay and will receive partial self funding
section 2.2 Funding Sources and Savings Allocation.

Customers may request to report lower savings than determined by the Evaluation Report or M&

5.2 Custom Programs Requirements

Both Option 1 and Option 2 customers are eligible for Custom Programs, and both must meet th
and follow the same process with BPA. Option 2 customers must use the custom program pat
Protocols for Option 2 Custom Projects are insufficient to provide direction (e.g., when an impac
to estimate savings).

5.1 Custom Programs Payment Rate

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5.1 Custom Programs Payment Rate Table

Project Type	Measure Life (Years)	Sector*	Payment Rate ($/kWh)
Nonresidential Lighting	All	Agricultural Commercial Industrial	$0.25
New or Retrofit Construction (Excluding Nonresidential Lighting)	1	All	$0.025
	2-3	Agricultural Commercial Industrial Residential	$0.06
	4-19	Agricultural Commercial Industrial Residential Utility Distribution	$0.33

Performance payment rates and maximum limits depend on the customer's classification as small, rural, residential (SRR), or none of these (non-SRR), as defined in the table below.[7] If the customer or BPA makes a classification or calculation mistake, the SRR status change becomes effective immediately upon discovery of the mistake. When a mistake is discovered, corrections to invoices for over- or under-payments will address the full period of time impacted but will not exceed the statute of limitations (i.e., six years). Availability of historical invoice details may be limited due to accessibility within the reporting system of record.

SRR Status	Definitions	Payment Rate $/kWh	Total Maximum Performance Payment Earned as a % of EEI Budget
Small	The customer's total retail load is less than 10 aMW.	$0.08	30%
Rural	The customer has fewer than 12 customers per line mile according to the Low-Density Discount calculations.		
Residential	The customer's load is greater than 66% residential according to U.S. Energy Information Administration data.		
Non-SRR	The customer is not small, rural, or residential.		

Customers earn performance payments from BPA-approved, EEI-fund
Performance payments for Strategic Energy Management (SEM) efforts
(i.e., incremental savings) and shall not be based on SEM Verified Savings
to be earned on self-funded activities (i.e., energy savings for which the cu
BPA).

A customer can submit invoices for earned performance payments
designated performance payment budget and the total amount invoiced
the customer's overall performance payment limit. Customers are not re
earned performance payments when submitting a performance payme
payments must be claimed prior to the end of the rate period in which t
claim performance payments up to the aggregate of each pool participan

BPA may restrict the performance payment that can be claimed on the
among customers (e.g., via an Implementation Budget Transfer). An incre
will result in a corresponding increase or decrease in their performanc
enough of its EEI budget so that its calculated performance payment bud
not be required to repay prior payments. BPA will not allow additional perf
of the rate period unless the customer receives additional EEI funds.

SRR Status	Definitions	Payment Rate $/kWh	Total Maximum Performance Payment Earned as a % of EEI Budget
Small	The customer's total retail load is less than 10 aMW.	$0.08	30%
Rural	The customer has fewer than 12 customers per line mile according to the Low-Density Discount calculations.	$0.08	30%
Residential	The customer's load is greater than 66% residential according to U.S. Energy Information Administration data.	$0.08	30%
Non-SRR	The customer is not small, rural, or residential.	$0.04	20%

7 BPA notifies customers of their rate period classification in the EEI allocation letter.
8 This restriction reduces the risk that BPA overpays because performance payments are paid on a $/kWh basis, independent of payment amount (i.e., a customer could use all of its performance payment, receiving little EEI payment, and then transfer its remaining implementation budget to another customer that similarly uses all of the performance payment).

CEC Early Findings Show Participant Savings

CEC estimated savings are between **120-136 kWh/year** and statistically significant

This is about **0.7% of annual usage** among participants



***Early findings from analysis of CEC's end-users—findings subject to change across utilities**

CEC Participants Open and Read the Reports

So far, a large portion of participants recall opening and reading the reports.





Many respondents identify taking steps to change energy usage *after* reading the reports.

***Self reported responses from early survey findings; full survey launched 9/15.**

What We Need From You – Evergreen is Here to Help!

EVERGREEN ECONOMICS

What we typically request:

- ❑ Hourly AMI Usage Data
- ❑ Monthly Billing Data
- ❑ Customer Contact Information for End-User Survey
- ❑ Program Data

** Please reach out to BPA prior to pulling AMI Usage Data*

Open Q Documentation

1

Submit Open Q Proposal

2

Participate for at least **one year** for evaluation

3

Submit Open Q Completion Report



Completion Report Documentation

- Official documentation of how many end-users participated (official letterhead is sufficient)
- Confirmation that end-users are receiving e-mail reports
- Information on cadence of e-mails being sent (quarterly at minimum)
- Expense summary
- Open Q Completion Report

How to Participate

- Fast-track option: IT or billing firm offering consumer/analytics package.
  - Ex: National Information Solutions Cooperative (NISC) offers a Bidgely-supported “Consumer Analytics” package.
- Other implementers may offer similar packages.
- Please **reach out to your** ECAE if you identify a **firm offering a comparable product.**

Resources & Support

- New Behavioral Webpage!
- Introductory Flyer
- 9/22 Behavioral Program Webinar posted online
- Follow-up meetings with BPA and Evergreen
- Data Requirements Info



BONNEVILLE POWER ADMINISTRATION

CUSTOMER ANALYTICS & ENGAGEMENT PLATFORM PILOT

Overview

Is your utility seeking to engage more customers in your Residential Program? If you communicate energy-saving tips with your customers (or would like to in the future), you may be eligible for savings!

The BPA Customer Analytics and Engagement Platform (CAEP) Pilot generates energy savings by equipping end-use customers with personalized insights about their home usage, how they compare to their neighbors, and strategies on adjusting behavior to save energy. Utilities will be equipped with valuable engagement tools and the option to add back-end analytics.

Value for End-Use Customer

- Personalized, actionable tips and strategies on how to reduce energy consumption and save money on bills.
- Enhanced insights into monthly electric bills.
- Information about additional utility rebate programs.
- Brand new offering for many residential customers.

Value for Utilities

- Ability to distribute to all eligible residential customers with email.
- Ease of implementation and ability to scale in short period of time.
- Low cost at scale.
- Bridge complementary residential program offerings
- Customer engagement and opportunity to add back-end analytics.

Estimated Costs

- First year set-up fee and ongoing subscription costs.
- EEI custom program and performance payments.
- Savings: 100 kwh/yr deemed savings per household.

Anticipated Prerequisites

- **Access to Hourly Advanced Metering Infrastructure (AMI) data** with the ability to transfer to implementers and evaluators. BPA evaluators are prepared and experienced in assisting utility customer staff with this task.
- **Willingness to survey end-use customers.** Evaluation end-user survey is a critical piece of research to help turn this pilot into a full program. Utilities will need to provide end-user customer contact information and will have the opportunity to review and provide comments on the survey but will not be responsible for administering.
- **Ability to respond to evaluator data requests.** BPA will provide additional information on anticipated data requirements.

Support Available

- BPA Energy Conservation Account Executives (ECAEs) and BPA Programs staff.
- Comprehensive technical assistance from BPA evaluator on data-transfer.

ADMINISTRATION

stomer pilot efforts to acquire energy savings and evaluate to be simple, flexible, and encourage innovation from BPA riers by providing technical and validation support to utilities r to evaluation completion. For further information, utilities ECAE).

grams?

pose custom programs or projects. Custom programs are verification (M&V) across the entire program.

Custom Projects are individual energy-saving projects that are not currently offered in the IM. For further information, utilities should reach out to their Energy Conservation Account Executive (ECAE) and consult the IM.

Questions?

kekelsay@bpa.gov

Heat Pump Water Heaters in Rural Areas

Brice Lang

Energy Conservation Account Executive



Heat Pump Water Heaters

- Do you offer or promote HPWH rebates?



Heat Pump Water Heaters in Rural Areas

- Use this measure while you can!
  - Potential new 2029 standard would require most water heaters to be HPWHs
  - This would likely end BPA's offering of this measure

HPWH Payments

11.1 Payment Summary

11.4 Electric Water Heating	
11.4.2–11.4.3 Unitary Heat Pump Water Heaters (BPA-Qualified)	$1,400-$1,800/water heater
11.4.4 Split System Heat Pump Water Heaters	$2,200/water heater

11.9.1 Payments for Existing Homes

Home Type	Income Qualified Measure	Measure Cost Payment	Repair Cost Examples Provided
Unitary HPWH - 40 gallon		Dollar-for-dollar, not to exceed $2,800	Examples include replacement of plumbing connections at water heater, relocating to ensure adequate ventilation.
Unitary HPWH – 50 gallon and above – Tiers 3 and 4		Dollar-for-dollar, not to exceed $3,000	
Split System HPWH		Dollar-for-dollar, not to exceed $3,000	

Heat Pump Water Heaters in Rural Areas

- Strategies for promoting HPWHs
  - Utilities purchase units to have on-hand
  - Gen Pac and other online purchase opportunities
  - Supporting DIY installs
    - Comfort Ready Home can do installation trainings for contractor and utility staff.
  - BPA Marketing support

Heat Pump Water Heaters

What barriers do you encounter?

Questions?

Thank you ☺

Break

30 minutes



Income Qualified

Amy Burke

Income Qualified Lead



Income Qualified (IQ): Year in Review

- ✓ Saw 40% increase in participating utilities compared to FY24 participation, with an improved mix of measures
- ✓ Created two new measures for IQ
- ✓ Improved connections both regionally and nationally
- ✓ Improved tribal outreach and support strategy
- ✓ Transitioned team members, improving cross-training
- ✓ Amy Burke transitioning into Residential Sector Lead Role, eventually backfilling the IQ Lead



Discussion

- How many of you offer IQ measures?
- Do you advertise your programs? Why or why not?
- Are you ramping up, ramping down, or just starting your IQ offerings?

IQ: New Heat Pump Measure!

Room Heat Pumps: Income Qualified (IQ) Option

- Webinar Slides & Overview Flyer
- Two tiers on a **QPL**: CEE Tier 2 & CEE Tier Advanced
- IQ payments are $800 to $2,000
- Savings range from 786 – 2,262 kWh/year
- **Emerging technology!**

New IM callouts…

11.5.2 Room Heat Pump (BPA-Qualified)

Income Qualified Measure Also Available



IQ: New Construction Measure!

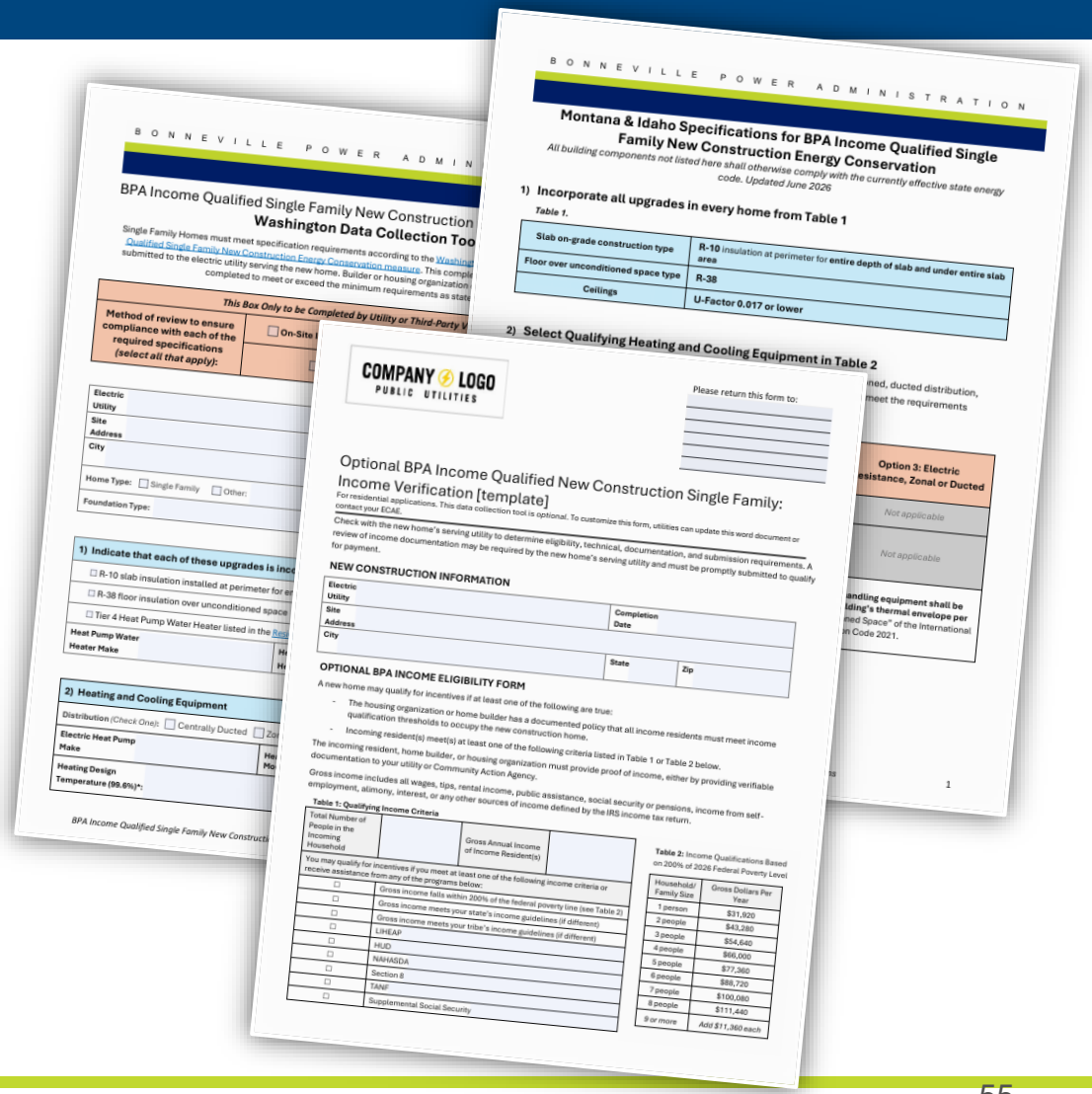
Income Qualified Single Family New Construction

- Webinar Slides & Overview Flyer
- Only eligible for **Single Family** in WA, OR, ID, and MT *(not available for WY, NV, or CA at this time)*
- Specifications and savings based on meeting requirements above state code
- WA payments are offered up to **$7,310** / home for any upgrade package
- WA savings range from **1,054 kWh** to **2,682 kWh** / home depending on package (first-year savings)



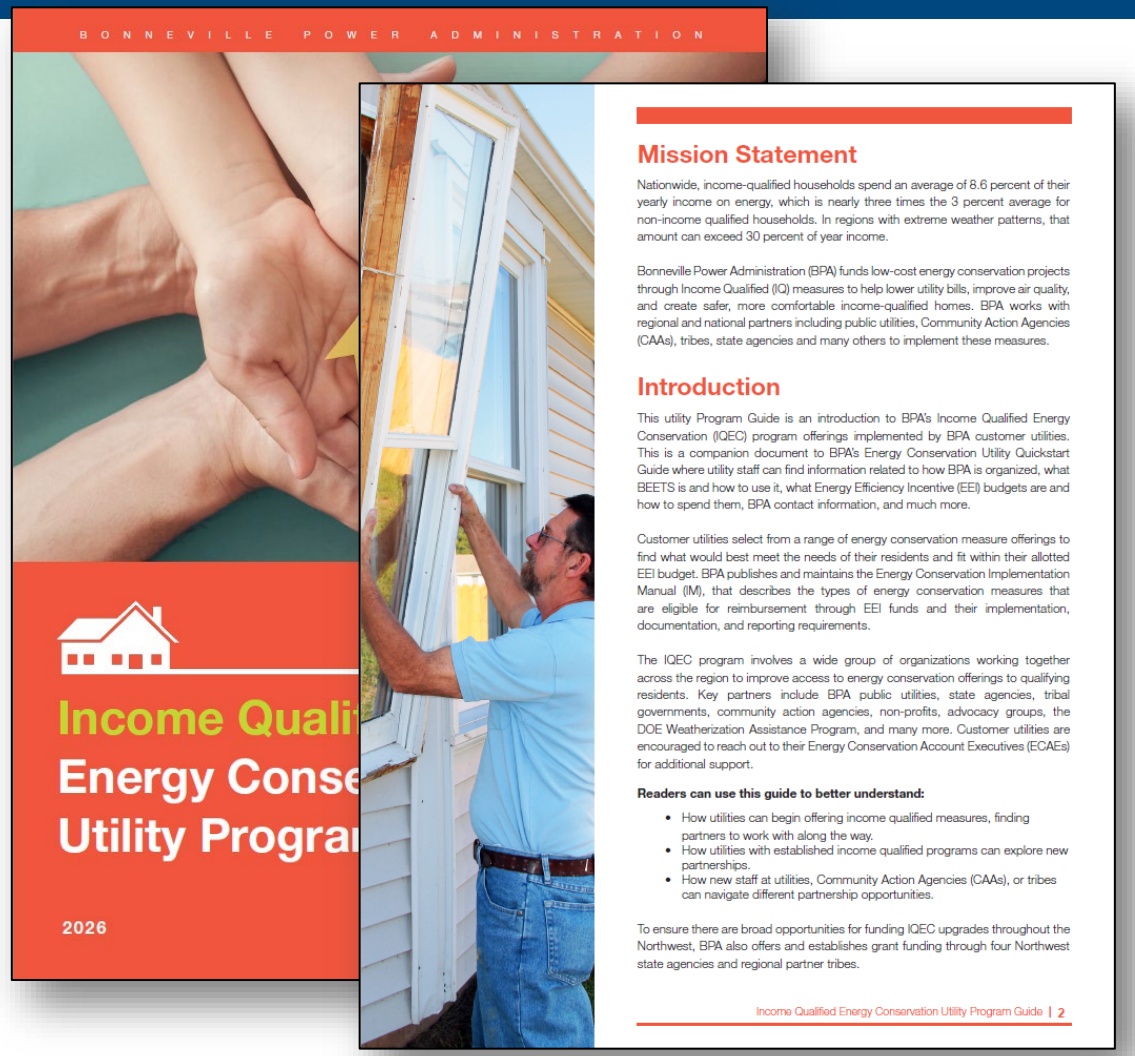
IQ: New Construction Measure!

- 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

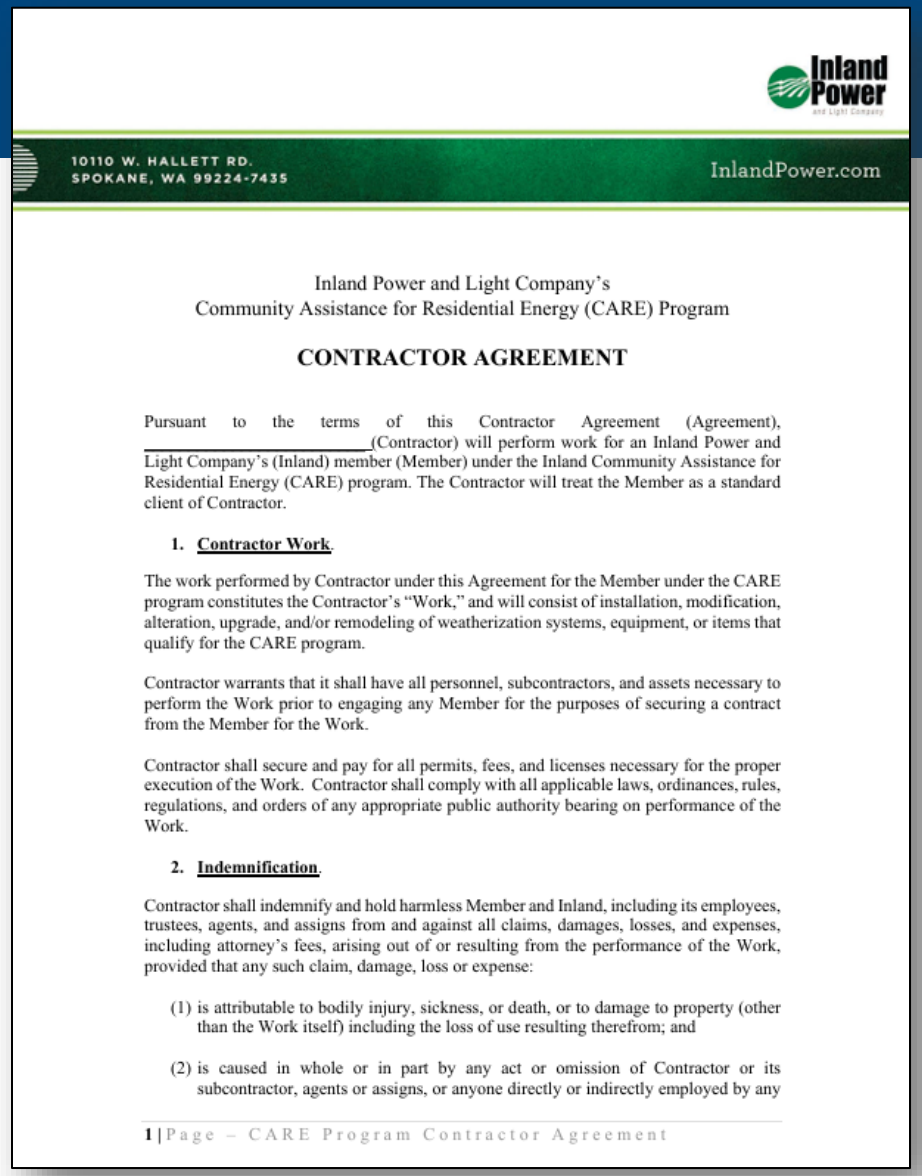
- Updated & published here
- Can find it on the IQ Home and IQ Utility webpage
- New resources and references
- Updated guidance on building relationships
- Contact information for regional Community Action Agencies



IQ Sample Documents

Example Utility Documents on the IQ Utility webpage under “Additional Documents”:

- Community Action Organization Invoice Packets Submitted to Funders
- Inland Power CARE Contractor Agreement
- Lower Columbia CAP Income and Occupancy Statement
- Inland Power CARE Member Agreement (meter usage data)
- Inland Power CARE Member Certification Release and Approval
- Inland Power CARE Subcontractor Agreement
- Cowlitz PUD Income Qualified Weatherization Program Agreement



Inland Power

10110 W. HALLETT RD.
SPOKANE, WA 99224-7435
InlandPower.com

Inland Power and Light Company’s
Community Assistance for Residential Energy (CARE) Program

CONTRACTOR AGREEMENT

Pursuant to the terms of this Contractor Agreement (Agreement), _____(Contractor) will perform work for an Inland Power and Light Company’s (Inland) member (Member) under the Inland Community Assistance for Residential Energy (CARE) program. The Contractor will treat the Member as a standard client of Contractor.

1. **Contractor Work**.

The work performed by Contractor under this Agreement for the Member under the CARE program constitutes the Contractor’s “Work,” and will consist of installation, modification, alteration, upgrade, and/or remodeling of weatherization systems, equipment, or items that qualify for the CARE program.

Contractor warrants that it shall have all personnel, subcontractors, and assets necessary to perform the Work prior to engaging any Member for the purposes of securing a contract from the Member for the Work.

Contractor shall secure and pay for all permits, fees, and licenses necessary for the proper execution of the Work. Contractor shall comply with all applicable laws, ordinances, rules, regulations, and orders of any appropriate public authority bearing on performance of the Work.

2. **Indemnification**.

Contractor shall indemnify and hold harmless Member and Inland, including its employees, trustees, agents, and assigns from and against all claims, damages, losses, and expenses, including attorney’s fees, arising out of or resulting from the performance of the Work, provided that any such claim, damage, loss or expense:

(1) is attributable to bodily injury, sickness, or death, or to damage to property (other than the Work itself) including the loss of use resulting therefrom; and

(2) is caused in whole or in part by any act or omission of Contractor or its subcontractor, agents or assigns, or anyone directly or indirectly employed by any

1 | Page – CARE Program Contractor Agreement

IQ Regional Fall Workgroups

- Goal: Foster more state-specific discussion
- Share-outs and lots of discussion
- EC Announcement will be made
- If these are helpful, plan to host regional IQ workgroups in the fall followed by two general workgroups the rest of the year
- Reach out to aaburke@bpa.gov if you want to be added to our IQ Workgroup mailing list

State	Meeting Date
Oregon	October 29th
Idaho	November 18th
Montana	November 18th
Nevada /Wyoming/ California /Utah	November 19th
Washington	December 2nd

IQ Tribal Grants: New Funding Year

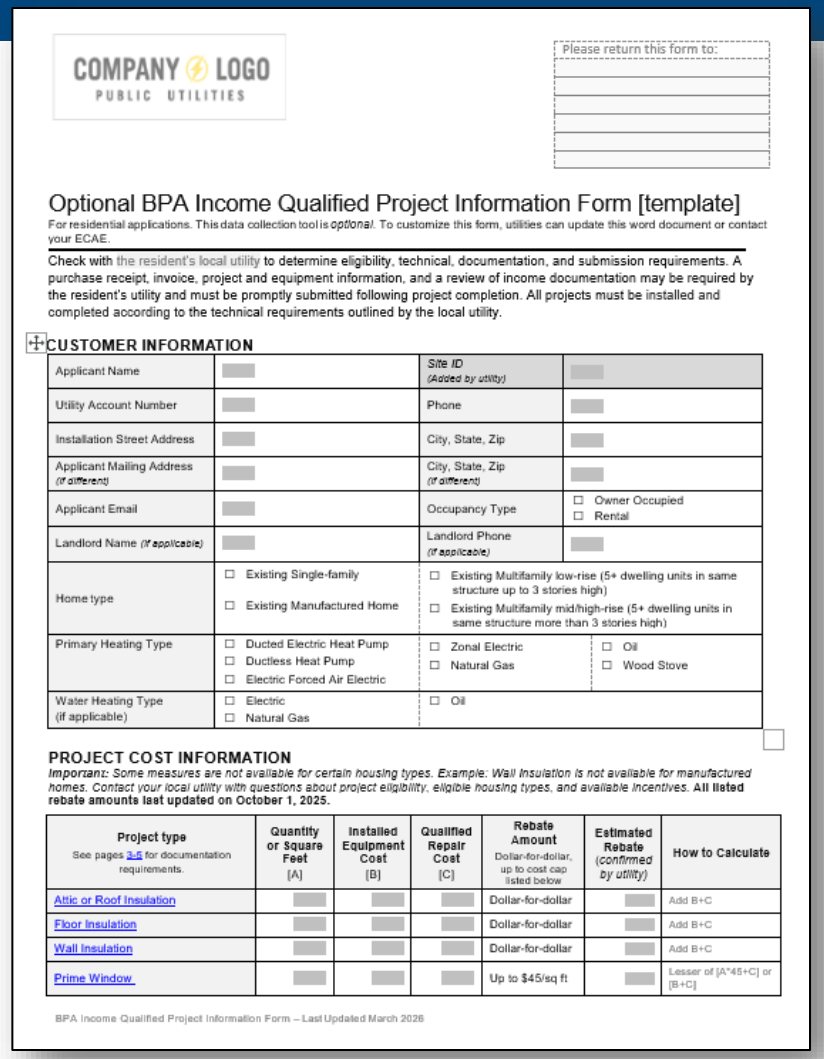
BPA Tribal Energy Conservation Grants

- Non-competitive grants offered directly to tribes for qualifying energy conservation projects.
- Submit a **Priority Application by Oct. 1 to ensure funding** for the following fiscal year.
- Alternatively, submit a **Letter of Intent by Oct. 15**, followed by the **standard application by Nov. 5 and beyond** as funding is available.
- Email ECTribalGrants@bpa.gov for more information.

Scan the QR code to review the BPA Funding Announcement with details of the grant offering and how to apply.

IQ Resources: Reminder

- IQ Webpages: Homepage, Utility Resources, Tribal Resources, & State Resources
- Webinar on How to Start an IQ program (slides and recording)
- Comfort Ready Home Income Qualified Page
- Optional Project Information and Income Verification Form
- Income Qualified Repair Cost Reference Table, grouped by associated measure types



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, utilities can update this word document or contact your ECAE.

Check with the resident's local utility 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)*	
Home type	☐ Existing Single-family ☐ Existing Manufactured Home	☐ Existing Multifamily low-rise (5+ dwelling units in same structure up to 3 stories high) ☐ Existing Multifamily mid/high-rise (5+ dwelling units in same structure more than 3 stories high)	
Primary Heating Type	☐ Ducted Electric Heat Pump ☐ Ductless Heat Pump ☐ Electric Forced Air Electric	☐ Zonal Electric ☐ Natural Gas	☐ Oil ☐ Wood Stove
Water Heating Type (if applicable)	☐ Electric ☐ Natural Gas	☐ Oil	

PROJECT COST INFORMATION

Important: *Some measures are not available for certain housing types. Example: Wall Insulation is not available for manufactured homes. Contact your local utility with questions about project eligibility, eligible housing types, and available incentives.* **All listed rebate amounts last updated on October 1, 2025.**

Project type See pages 3-5 for documentation requirements.	Quantity or Square Feet [A]	Installed Equipment Cost [B]	Qualified Repair Cost [C]	Rebate Amount Dollar-for-dollar, up to cost cap listed below	Estimated Rebate *(confirmed by utility)*	How to Calculate
Attic or Roof Insulation				Dollar-for-dollar		Add B+C
Floor Insulation				Dollar-for-dollar		Add B+C
Wall Insulation				Dollar-for-dollar		Add B+C
Prime Window				Up to $45/sq ft		Lesser of [A*45+C] or [B+C]

BPA Income Qualified Project Information Form – Last Updated March 2026

Discussion!

- What are your easiest and what are your hardest IQ measures to implement and why?
- Are there any specific challenges with other state or national programs that you're leveraging?
- What can we do to help?



Thank you for all the work you do in your communities for your residents. It makes a difference!

Questions?

Thank you ☺

FY27 Direct Funding Distribution

Brice Lang

Energy Conservation Account Executive



Survey

Show of hands:

- Who has done DFD before?
- If not, are you considering it?

Participation Since FY 2023



289 Applications Approved

35 Utilities

Over $16M Distributed

Over 10 aMW

All Sectors Represented
All types of measures (Custom, UES, Non-Residential Lighting)

Purpose



- Identify cost-effective energy conservation projects that assist in meeting BPA's goals.
  - Customers may not have enough EEI
  - Customers expended 100% of EEI

Overall Funding



- From Energy Efficiency's Infrastructure
- Customers who cannot spend their EEI

Requirements



- Customers must have a valid Energy Conservation Agreement
- Projects must fall within Implementation Manual

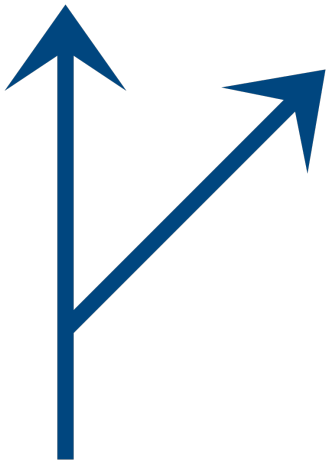
Activity	Date	Description
Application Window Opens	Nov. 2, 2026	Special Promotions on bpa.gov
Customer Webinar	Nov. 17, 9-11am (PST)	Special Promotions on bpa.gov
Application Deadline	Jan. 15, 2027	Application packages should be sent to et@bpa.gov by 11:59pm PST.
Project Selection Process	Jan. 29, 2027	Final ranking and prioritization of application submittals.
Award Notification	Feb. 5, 2027	Award/waitlist/decline notification of application submittals.
Signature deadline	Feb. 26, 2027	Customer signed agreements due.
Completion Deadline – Custom Project	Aug. 20, 2027	Submit project completion (with completed M&V) into BEETS.
Completion Deadline – UES and non-residential lighting	Sept. 3, 2027	Submit project completion into BEETS.
Invoice Deadline	Sept. 17, 2027	Utility submits invoice by deadline.
Final Payments	10 days after invoicing	Final payments will be processed upon approved invoice.

DFD Webinar: Nov. 17, 9-11am (PST) Webex Meeting Add to calendar

DFD Office Hours

- November 10, 1-3pm (PST) Webex Meeting Add to calendar
- December 16, 1-3pm (PST) Webex Meeting Add to calendar
- January 6, 9-11am (PST) Webex Meeting Add to calendar

Two Routes



- All Customers
- Customers who Receive Less Than $50,000/year in EEI

All Customers



- Approximate Budget for DFD: $1.2M
- May request up to $250K per project
- One project site or incentive program (i.e. washers & dryers, multi-family weatherization) per application

Customers under $50K/year in EEI



- Approximate Budget: $200K
- May request up to $50K per project
- One project site or incentive program (i.e. washers & dryers, multi-family weatherization) per application

14. **Can projects already be completed? When should projects be completed by?**

Yes. Projects that have not yet been reported/submitted in BEETS for technical or compliance review are still eligible to apply for DFD. These could be future projects, in-progress projects, and installed/completed projects. Below are the cutoffs for various BEETS reporting programs:

- UES measures: Must be awarded DFD before uploading to BEETS via the bulk UES Measure Upload Template. The upload automatically initiates Compliance Review.
- Non-Res Lighting (OLC): Must be awarded DFD prior to submitting the project from Hancock Cloud to BEETS.
- Custom Projects: Must be awarded DFD before submitting the Completion Report for technical review.

DFD-awarded UES and non-residential lighting projects must be completed prior to the submission deadline of September 3, 2027. DFD-awarded custom projects must complete the final M&V by the invoicing date of September 17, 2027.



Application
(Any Customer)

APPLICANT INFORMATION

Utility Name

Address | City | State | Zip Code

Utility Approver & Title | Phone | Email

Utility Point of Contact | Phone | Email

B. PROJECT ELIGIBILITY

Select what is applicable of the following:

☐ **Utility has utilized 100% of its rate period (2026-2028) EEI budget as reported in BEETS.**

☐ **Utility expects to fully utilize its EEI this rate period (2026-2028) by September 30, 2028. Utility is required to provide a detailed plan to show how its EEI budget will be fully utilized.**

☐ **None of the above applies. Add your explanation below and continue completing the application.**

Instructions

- Should include narrative and figures (embedded spreadsheet, etc.)
- As detailed as possible
- No longer than 2 pages
- Contact your ECAE for assistance if needed

Introduction

Customer summary of conservation priorities, EEI budget, etc.

Spend Plan (Example)

Customer Name Budget Forecast

Total EEI Budget		Remaining Proposed Amount (Remaining EEI Budget with the below Proposed/Planned Projects included)	
Remaining EEI Budget as of {DATE} per BEETS			
Customer/Organization	**Project Name**	**Total Estimated Busbar Savings**	**Total Estimated Incentive for Proposed/Planned Projects**
List Proposed/Planned Projects (Add lines as needed)			
Total Incentive for Proposed/Planned Projects			
Total Est. Busbar for Proposed/Planned Projects			
Total Est. Performance Payments for Proposed/Planned Projects (Total Busbar*4%/8%)			

Any Additional Information

- Information about sector specific projects/demographics/growth rates
- What won't be completed without DFD award(s)

C. PROJECT PROPOSAL

Energy Conservation Projects must be in compliance with BPA's Implementation Manual. One application must be submitted for each project site (i.e. a commercial building; a multi-family housing project) or incentive program (i.e. a specific number of washers & dryers; a specific number of ductless heat pumps).

Sector (check one):

☐ Agricultural ☐ Commercial ☐ Industrial ☐ Residential ☐ Utility Distribution

Type of Project (check all that apply):

☐ UES ☐ Custom ☐ Non Residential Lighting ☐ Other

If a custom project, have you discussed this project with your Customer Service Engineer (CSE)/Energy Smart Industrial Partner (ESIP)? ☐ Yes ☐ No

Custom projects may need additional preparation time; which year will this project be completed? If planning to phase the completion of the project over two years, please submit a separate application for each year. ☐ 2027 ☐ 2028

Unique Project Name (i.e. Main High School East Wing Hallway Lighting):

For UES Measures, provide Reference Number(s):

Project Description (include goals, objectives, existing baseline and proposed conditions, etc.):

Project Site Name (may not applicable for incentive measures as described above):

Project Site Address (may not applicable for incentive measures as described above):

Will UES Measures or non-residential lighting measures be completed and reported into BEETS by September 3, 2027? ☐ Yes ☐ No

Will custom projects be completed and reported in BEETS by August 20, 2027? ☐ Yes ☐ No

Will the project be invoiced by September 17, 2027? ☐ Yes ☐ No

D. PROJECT PROPOSAL ENERGY SAVINGS

Enter estimated average benefit to cost ratio:

Enter estimated busbar kWh savings:

Enter calculations in support of project (BPA approved calculators and/or C1 forms are acceptable but not required)

E. DFD FUNDING REQUESTED

DFD Funding Requested	$
EEI Portion (if applicable)	$
Self-Funded Portion (if applicable)	$
Estimated Total Project Budget (Should equal 100% of the above rows)	$

What is your contingency plan if your DFD project exceeds the requested DFD funding (i.e. self-funding, bilateral transfer)?

F. APPLICANT CERTIFICATION AND SIGNATURE

My signature below indicates the following:

- I understand that fuel switching is not permissible under any BPA incentives or programs.
- I affirm that this project has not already been reported to BPA using EEI or Self-funding.
- All conservation measures installed meet the requirements of BPA's conservation standards found at https://www.bpa.gov/-/media/Aep/customers-and-contractors/bfai-21-1-full-text-parts-1-8and-appendices.pdf.
- I understand that BPA M&V protocols will be followed.
- I will ensure that BPA staff is provided access to the project site.
- I will provide additional project documentation upon request.
- I understand that changes to the proposal after BPA's acceptance may reduce the funding received.
- I understand that a separate funding agreement must be signed before receiving any funding for this project.
- UES and non-residential lighting projects will be completed and reported in BEETS by September 3, 2027, and invoiced before September 17, 2027.
- Custom projects will be completed and reported in BEETS by August 20, 2027 and invoiced before September 17, 2027.
- All the information in this application is true and accurate to the best of my knowledge.
- I am authorized to sign on behalf of the utility.

Applicant Printed Name	**Applicant Title**
Applicant Signature	**Date (mm/dd/yyy)**



Application Process
(Customers under $50,000/yr EEI)

B. PROJECT ASSISTANCE

To complete the proposed project, do you need BPA-funded assistance? This could be project management, contractor assistance, marketing, etc. ☐ Yes ☐ No

Describe type of assistance needed (Please note BPA will try to find additional resources, but there is no guarantee):



Scoring: All Customers

DFD Scoring Matrix for Any Customer

20% SRR?	5% First Time Recipient	5% Contributing Self-Funding to Project	30% EEI Expenditure	30% BPA $/kWh	10% B/C Ratio
Yes/No	Yes/No	5pts = 10% or more of project cost	30pts if 100% EEI expended (per BEETS)	30pts = <.14	10pts = >3.0
Yes = 20	Yes = 5	0pts = no self-funding	24pts if 99-90% EEI expended (per BEETS)	24pts = .15-.24	5pts = 1.0-3.0
No = 0	No = 0		18pts if 75-89% EEI expended (per BEETS)	18pts = .25-.33	0pts = <1.0
			12pts if 60-74% EEI expended (per BEETS)	12pts = .34-.49	
			6pts if 45-59% EEI expended (per BEETS)	6pts = .50-.74	
			0pts if <44% EEI expended (per BEETS)	0pts =>.75	
			75-100% expended do not need a spend plan		



Scoring: Customers Under $50K/yr

DFD Scoring Matrix for Customers who receive less than $50,000 of EEI annually

30% EEI Budget	5% First Time Recipient	50% BPA $/kWh	15% B/C Ratio
30pts = <$10K initial annual EEI	Yes/No	50pts = <.25	10pts = >3.0
15pts = $10K - $25K initial annual EEI	Yes = 5	40pts = .25-.75	5pts = 1.0-3.0
0pts = >$25K initial annual EEI	No = 0	30pts = .76-1.00	0pts = <1.0
		20pts = 1.01 - 1.25	
		10pts = 1.26 - 2.00	
		0pts =>2.00	

Questions?

Thank you ☺

Break

15 minutes



Utility Roundtable

Part 1





Let's Hear From You!

- Successes
- Barriers
- Goals
- How can we help?

Dinner and Networking (Optional)





Good Morning! Welcome to Day 2

Hosted by Tanner Electric Cooperative

45715 SE 140th Street,

North Bend, WA 98045

Commercial & Industrial Sectors



Commercial & Industrial Agenda

- Trade Ally Network Northwest (TANNW)
- Online Lighting Calculator (OLC)
- Energy Smart Industrial (ESI)
- Strategic Energy Management (SEM) for K-12 Schools

TRADE ALLY NETWORK NW
Building Success Together

Energy Smart Industrial

C&I Program Updates

Eric Mullendore

Commercial & Industrial Sector Lead



Trade Ally Network Northwest (TANNW)

- Evergreen Energy Partners is supporting the Trade Ally Network NW program effective 10/1/2026.

- TANNW field specialists will be developing account plans in Q1 and Q2 FY27.

TRADE ALLY NETWORK NW
Building Success Together

TANNW Scope

Primary focus on project implementation support:

- Online Lighting Calculator
- Field activities
- Opportunity Knocks outreach events

TANNW Scope

Marketing and Outreach:

- Field Guide
- Newsletter
- Trade Ally Recruitment

Online Lighting Calculator (OLC)

MINT release 1656

- Optional upgrade that addresses a variety of non-critical bugs
- Currently undergoing BPA testing
- Targeting October release

OLC Resources

- Training Videos
  - Decommissioning Measures
  - New Construction Projects
  - Non-standard Measure Review

- User Manual Version 4.3 (July 2026)

Energy Smart Industrial (ESI)

Finding efficiency more efficiently

• 8.7.5 Efficient Pumps	$0.33 / kWh
• 8.7.6 Variable Frequency Drive for Pumps	$180 / hp
• 10.4.2 Small Compressed Air Systems	$0.33 / kWh
• 10.4.4 Variable Frequency Drive for Industrial Fans (NEW)	$260 / hp

Energy Smart
Industrial

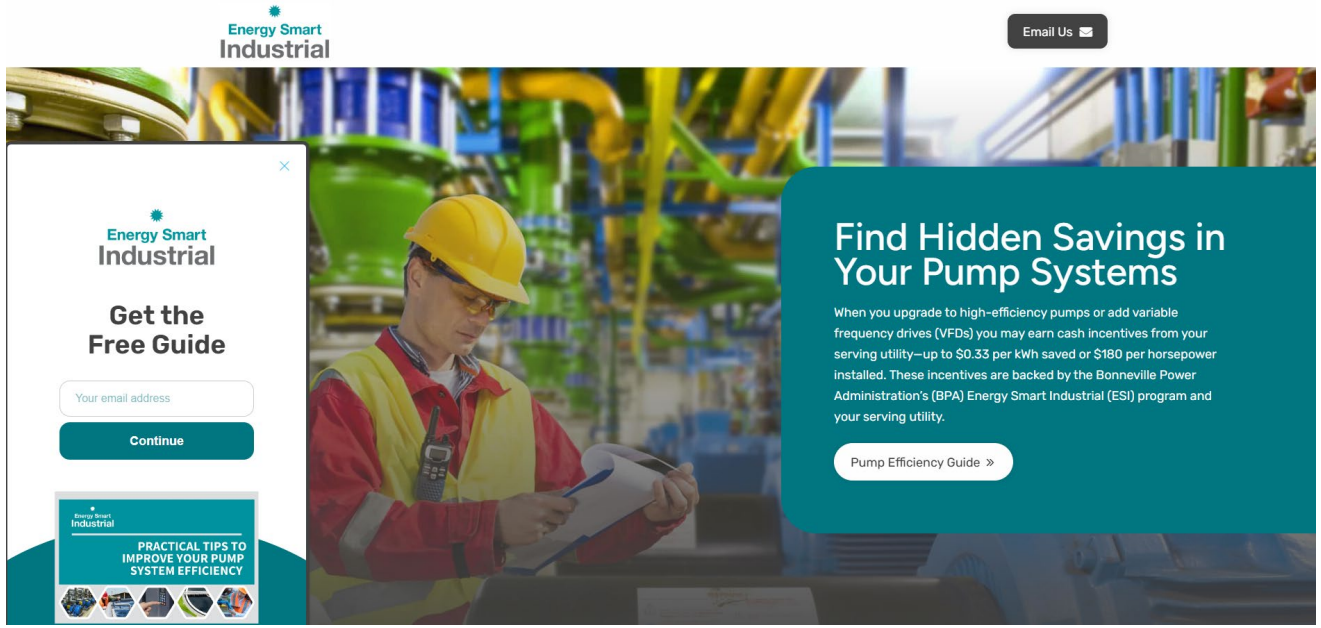
ESI Marketing Campaign

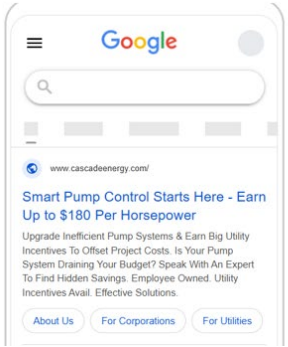
Purpose

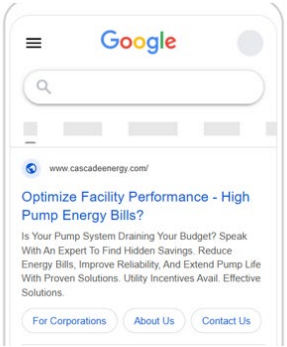
Increase awareness of pump system improvement opportunities and connect interested audiences to ESI resources that support practical next steps.

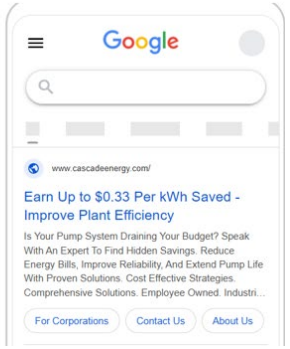
Campaign approach

- Use search intent to reach audiences already looking for pump solutions.
- Offer a clear resource: the Pump System Efficiency Guide.
- Provide a simple path to connect with ESI team.









Early Campaign Results

4,552
campaign impressions

7.25%
click-through rate

Impressions	Clicks	CTR	Est Impr Share
4,552	330	7.25%	28.1%

Impressions and Clicks by Day



Campaign Performance

Campaign	Ad Group	Publisher	Impressions	Clicks	CTR
Energy Smart Industrial	Energy Smart Industrial	Bing Ads	1,637	231	14.11%
Energy Smart Industrial	Energy Smart Industrial	Google Ads	2,915	99	3.40%
GRAND TOTAL			4,552	330	7.25%

Takeaway

The campaign is generating visibility of ESI pump system resources and driving traffic to the campaign's landing webpage.

Campaign launched June 26, 2026; initial results measured through Aug. 5, 2026.

Discussion

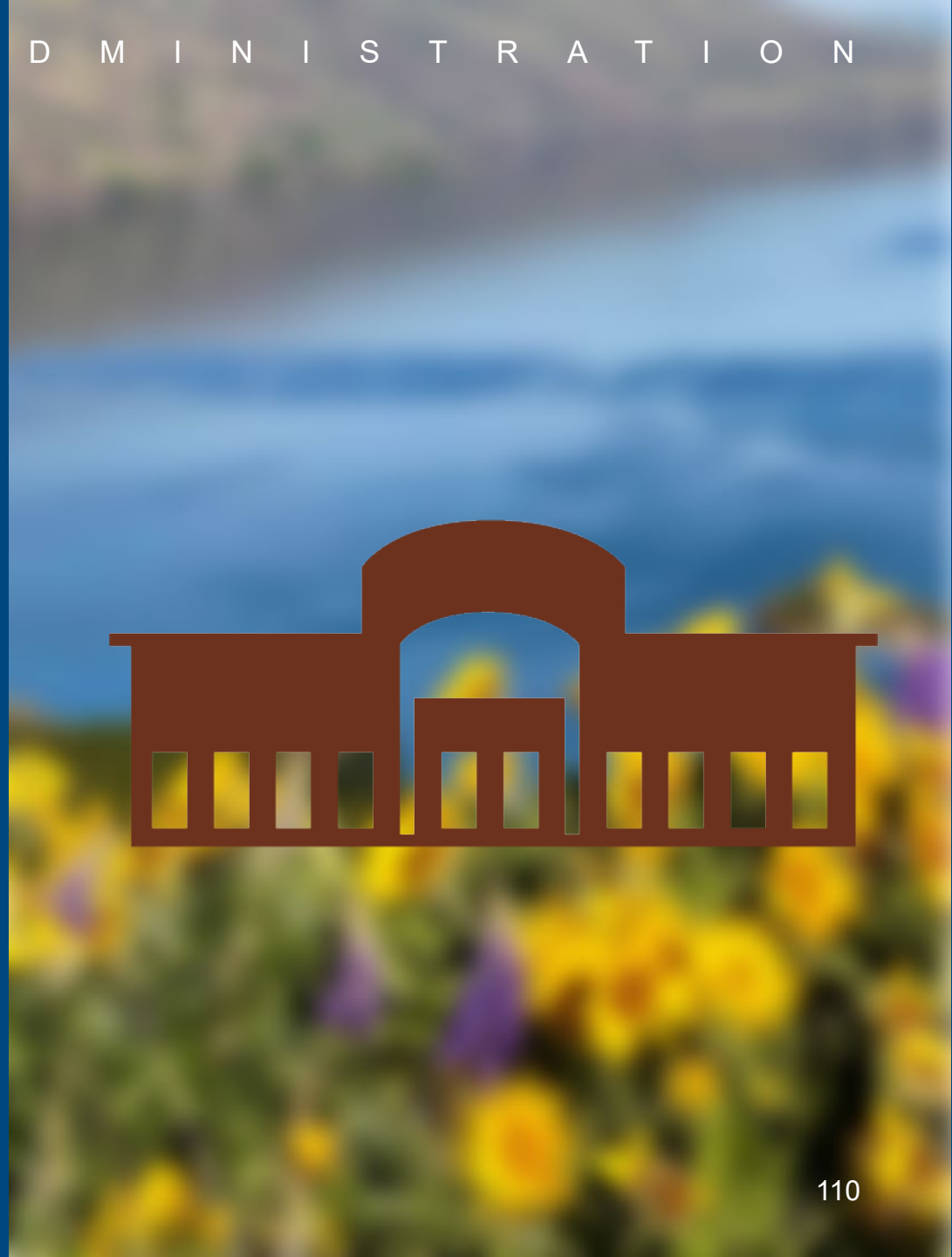
What trends in C&I project delivery are you seeing?

What would you like to see BPA do better to support C&I sector projects?

Strategic Energy Management, K-12 Schools

Ben Graves

Commercial Program Manager



Agenda

- Introduction
- Why a SEM for K-12 Schools Pilot
- Current Pilot Design
- What's Next

SEM for K-12 Schools Pilot

- BPA has been working with a partner to develop a pilot for a Strategic Energy Management (SEM) program for K-12 Schools.
- Targeting an early calendar year 2027 launch for the SEM Cohort.
- Pilot details are being finalized but it's never too early to ask: Could SEM help my utility and its school districts meet their energy goals?

Bonneville Power Administration

- Programs Team
- Emerging Technology
- Customer Service Engineers
- Energy Conservation AE
- Marketing

New Buildings Institute

- Oregon-based 501(c)3
- >25 years focused on building efficiency
- Strong Schools Initiative (10 years strong!)



Why Focus on SEM for Schools

BPA has supported SEM since 2009 to help sites optimize energy use through low-cost, behavior-driven operational improvements.

1 Proven model focused on a high-needs sector

Commercial and Industrial sites report success with SEM. K-12 schools are a high-needs sector.

2 SEM Success

Achieved almost 4 aMW of energy savings from the Commercial and Industrial sectors in the last rate period.

3 School Engagement

BPA has a long history with schools through various pilots, ESCOs, and other school efforts.

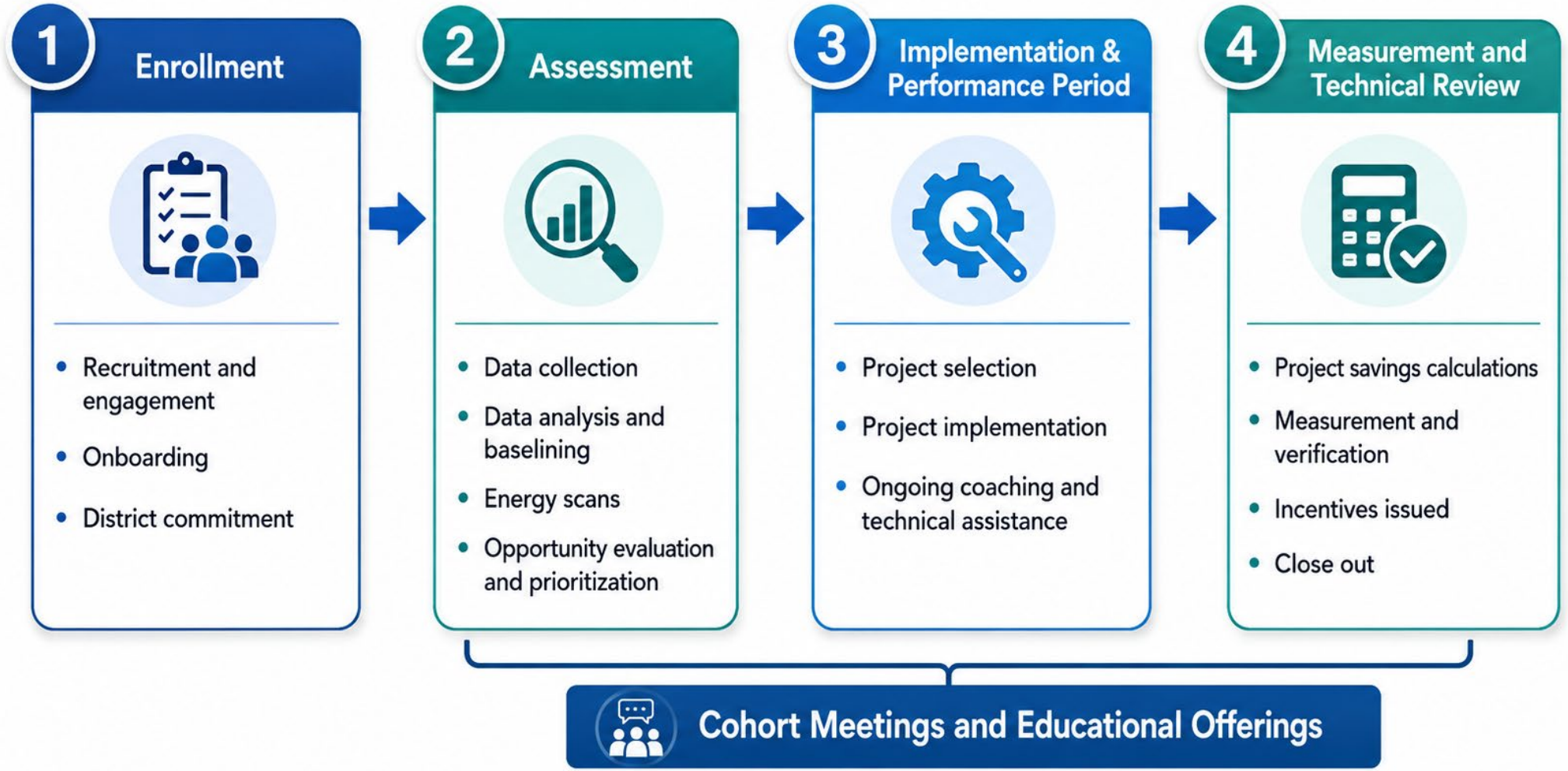
Benefits for Schools

- Schools can see energy savings of **10 percent or more** through low- or no-cost operational changes *(ENERGY STAR®).*

- Schools can see **reductions in maintenance staff time** from better functioning systems (seven percent reduction in HVAC work orders at River Trails SD).

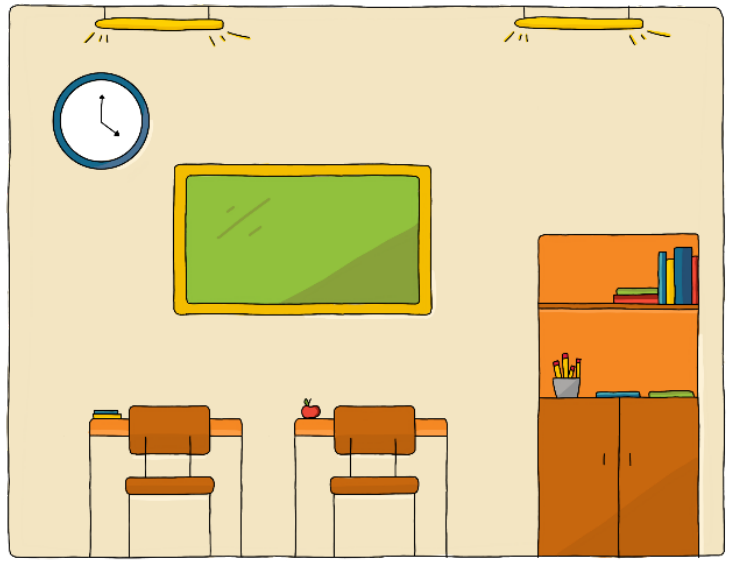
- *Example: Medford School District (OR) reduced annual energy costs by an estimated **$80,900 in its first year of SEM** through behavioral changes and low-cost operations and maintenance improvements.*

SEM Pilot Components



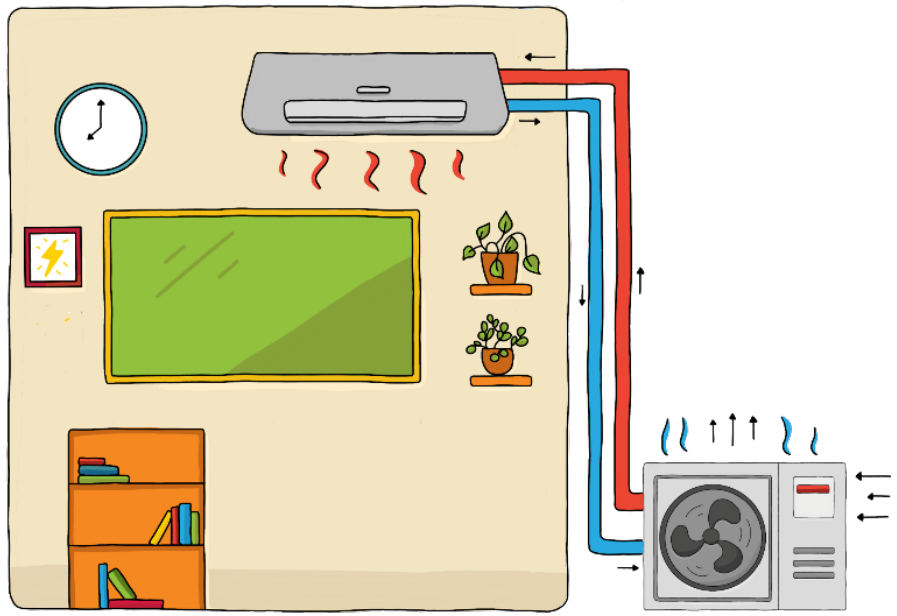
Phase 1: Enrollment

- Utility outreach to support and identify potential districts.
- Introductory engagement with districts.
- Districts commit staff time and resources and identify an Energy Champion for program participation.



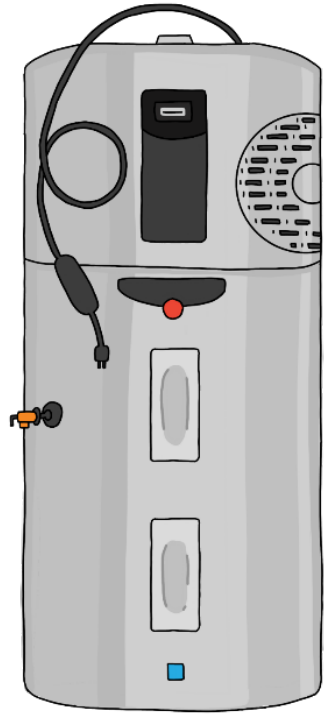
Phase 2: Assessment

- Utilities provide baseline billing data, and support goal setting.
- Energy scan for low- or no-cost opportunities.
- Opportunity identification and project prioritization.



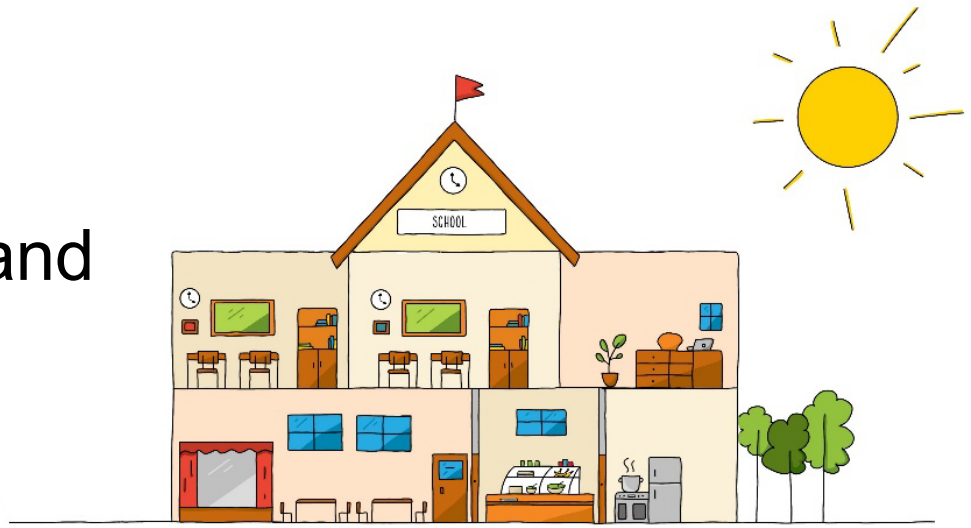
Phase 3: Implementation

- Project kick off and implementation.
- Ongoing coaching and technical assistance from NBI.
- Quarterly milestone evaluation to ensure project(s) are on track or if pivots are needed.



Phase 4: Measurement

- All outcomes and data collected.
- Measurement and Verification (M&V) process, adhering to BPA protocols.
- Annual report documents SEM savings and payment.
- Serving Utility approves final report and issues SEM savings payment.



Roles

BPA:

- Leads utility coordination, capital project support, and technical review of final SEM deliverables.

NBI:

- Leads school district onboarding, energy scans, coaching, and development of SEM savings analysis.

Utility:

- Identifies potential participant districts, manages all incentive discussions, and participates in all other program elements to the extent interested/available.

Next Steps

BPA:

- Finalize pilot design and communicate official recruitment launch.

Utilities:

- Provide feedback on pilot design.
- Identify potential district participants.
- Help provide outreach and recruit district.

Questions?

- Thank you ☺

Break

Until 10:05am



Meet the Marketing Team



Mike Gross
Marketing Lead



Rachael Ettelman
Marketing Specialist



Maggie Bagan
Marketing Specialist



Ming Kust
Marketing Specialist



Robin Moodie
Marketing Specialist

Skill sets and Services



Collective Skills

- Graphic Design
- Production Design
- Technical, Public Relations, Copywriting, and Editing
- Presentations
- Web Design
- Video Production (Instructional and Social Media Videos)
- Marketing Strategy and Planning

Graphic Design Services

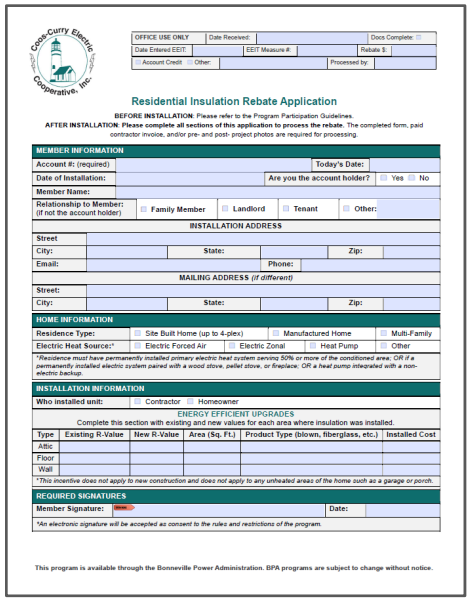
Original Graphic Design Services | Template Customization | Forms



Customized social media or other digital graphics.

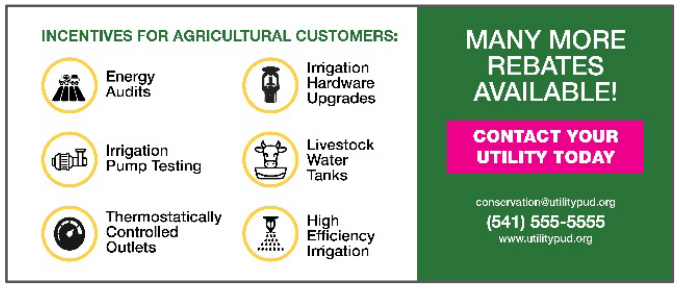


Print collateral, including flyers and case studies.



Form development and audit forms for BPA requirements.

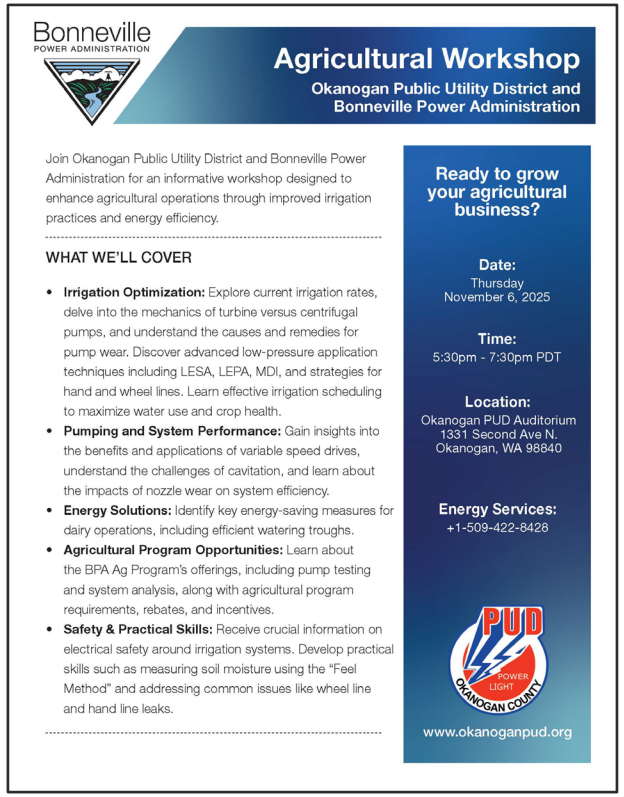




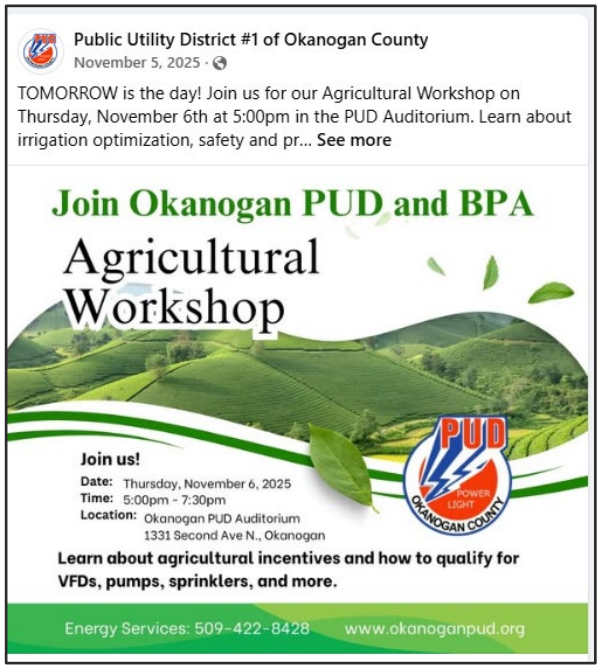
Customized bill inserts promoting incentives.

Graphic Design Services

Workshop Promotional Kit



Invitation Flyer



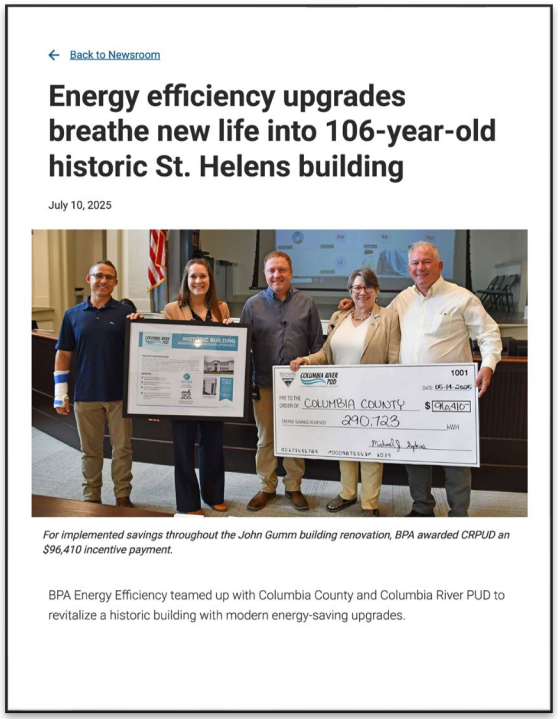
Facebook Post Graphic



Print Ad

Graphic Design Services

Press Kit



← Back to Newsroom

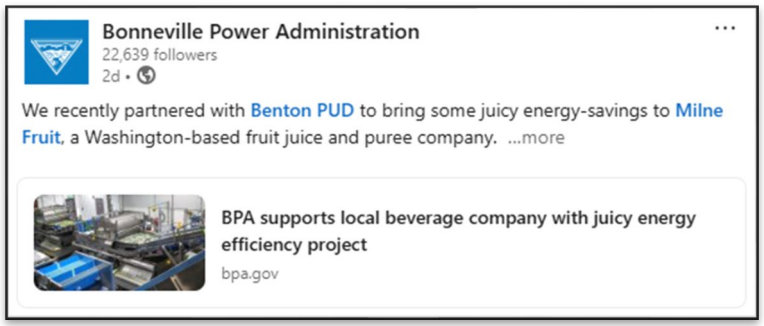
Energy efficiency upgrades breathe new life into 106-year-old historic St. Helens building

July 10, 2025

For implemented savings throughout the John Gumm building renovation, BPA awarded CRPUD an $96,410 incentive payment.

BPA Energy Efficiency teamed up with Columbia County and Columbia River PUD to revitalize a historic building with modern energy-saving upgrades.

Articles and Press Releases



Bonneville Power Administration
22,639 followers
2d •

We recently partnered with Benton PUD to bring some juicy energy-savings to Milne Fruit, a Washington-based fruit juice and puree company. ...more

BPA supports local beverage company with juicy energy efficiency project
bpa.gov

Social Media Posts



COLUMBIA RIVER PUD
A COMMUNITY-OWNED UTILITY

HISTORIC BUILDING
BENEFITS FROM MODERN UPGRADES

PROJECT BACKGROUND

Built in the early 1900's, the John Gumm building served as the schoolhouse in St. Helens, Oregon until 1999. Columbia County purchased and remodeled the treasured historical building now known as the John Gumm Civic Office. As part of a larger multi-phase effort to enhance the functionality and capacity of their facilities, Columbia County worked with Columbia River PUD to find energy efficiency incentives. The utility identified a variety of attainable upgrades and incentives including high performance windows, lighting retrofits, insulation, heat recovery system, and variable refrigerant flow HVAC system upgrades.

RESULTS

- The building upgrades will save an estimated 290,723 kWhs annually.
- Columbia River PUD provided an incentive payment of $96,410.
- The efficiency upgrades will save time and money on maintenance.
- Improved workflow, safety, and operational flexibility to accommodate future growth, ultimately improving our ability to serve the community.

290,723
kWh Annual Energy Savings

$96,410
Columbia River PUD Incentive Payment

John Gumm building exterior with new windows

New variable refrigerant flow HVAC system

What ideas do you have to save money?

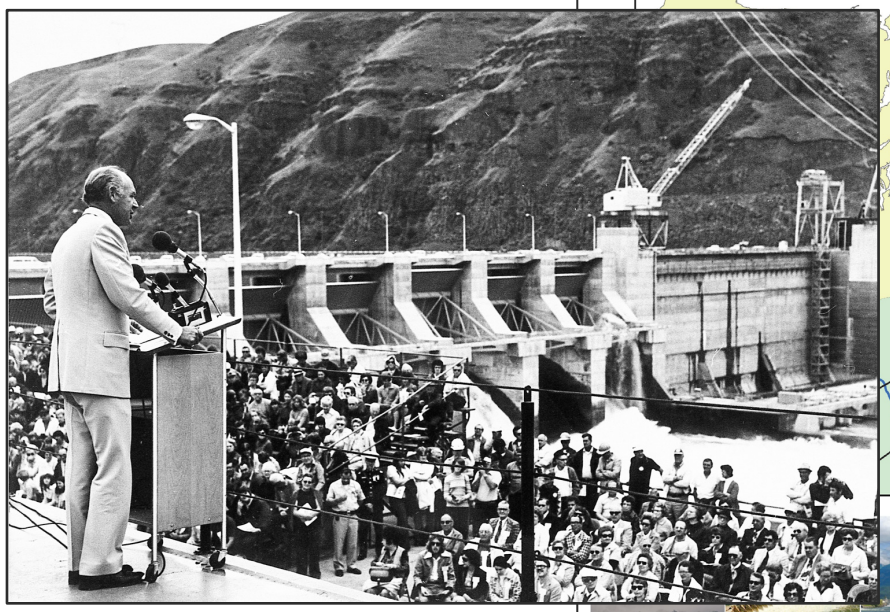
Columbia River PUD offers multiple energy efficiency incentives for residential, commercial and other types of customers.

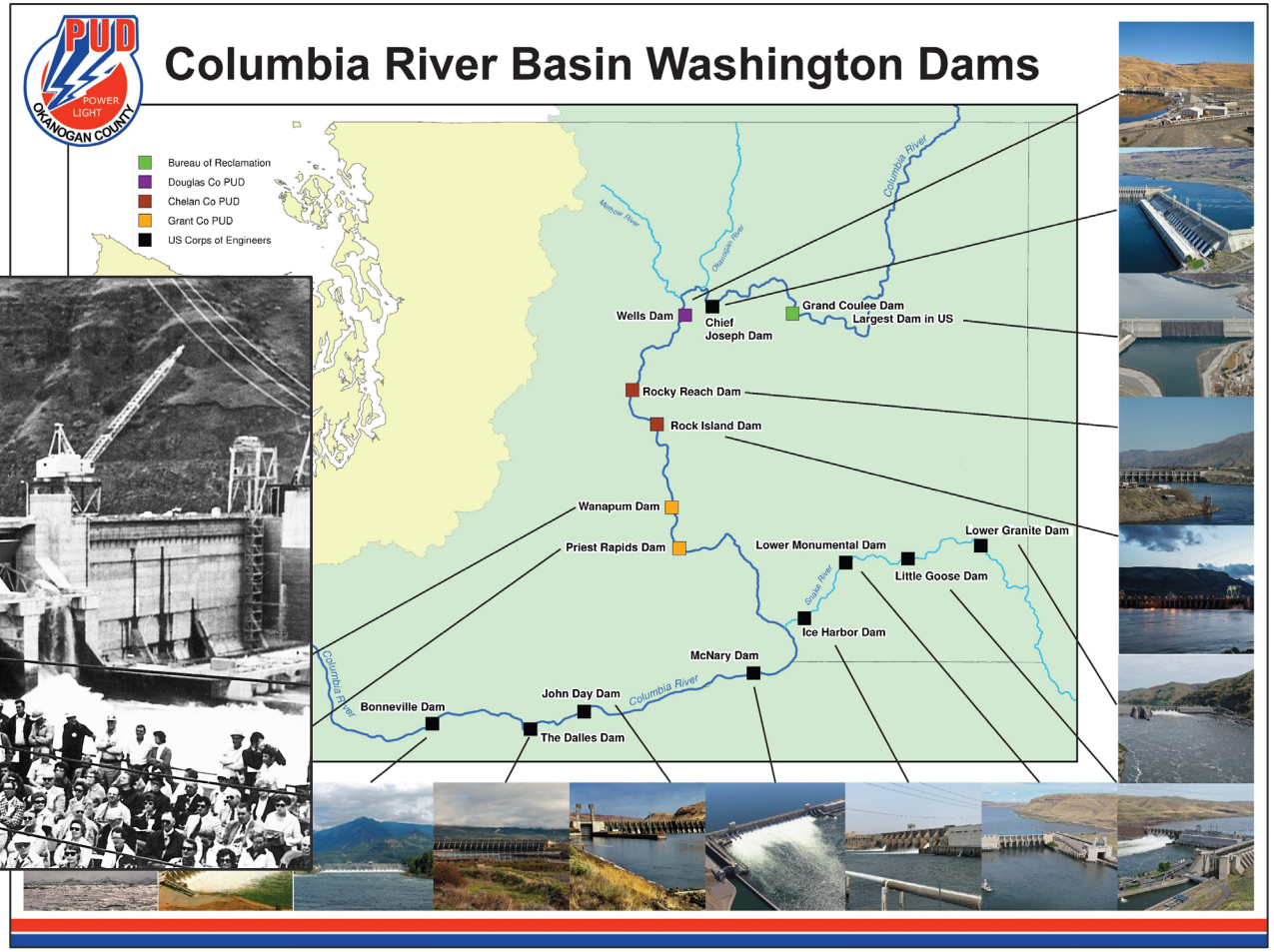
Columbia River PUD
(503) 397-1844
www.crpud.net

Project Success Posters and Case Studies

Graphic Production

- Access to BPA image archive.
- Stock photos available for customer use.
- Infographics
- Maps





Services

Website Recommendations

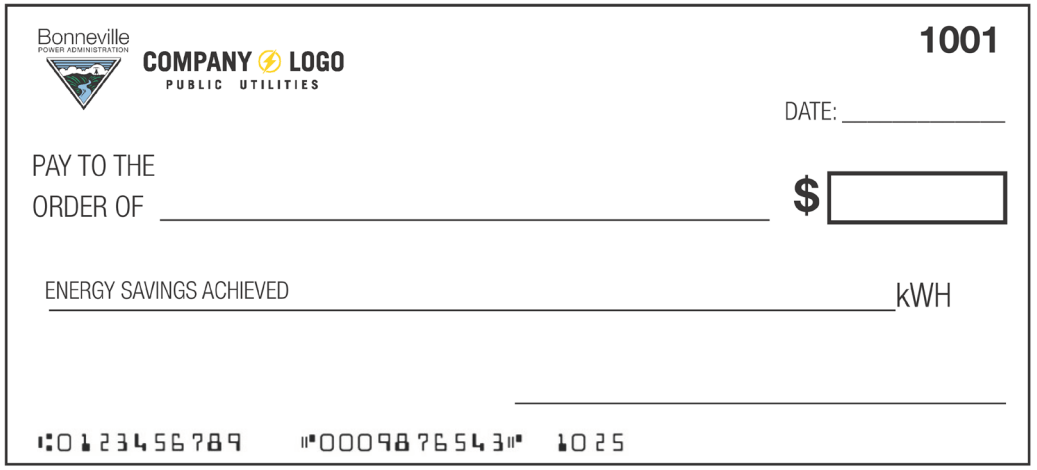
- Review existing website and make recommendations.
- Graphics production.
- Search engine optimization.
- Improve user experience.
- Increase program visibility.

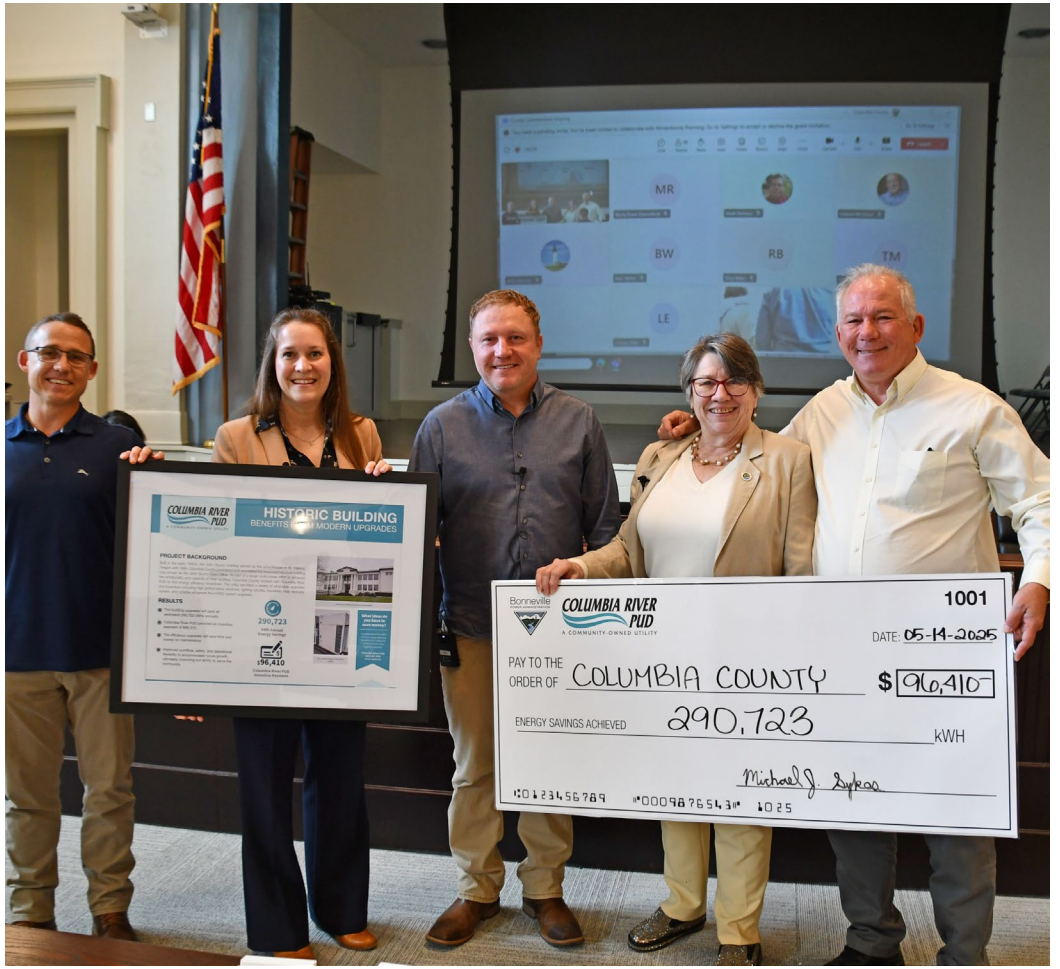


Services

Big Check

- Laminated.
- Customized with logo.
- Re-usable with dry erase markers.
- Great for photo ops for case studies, articles, etc.





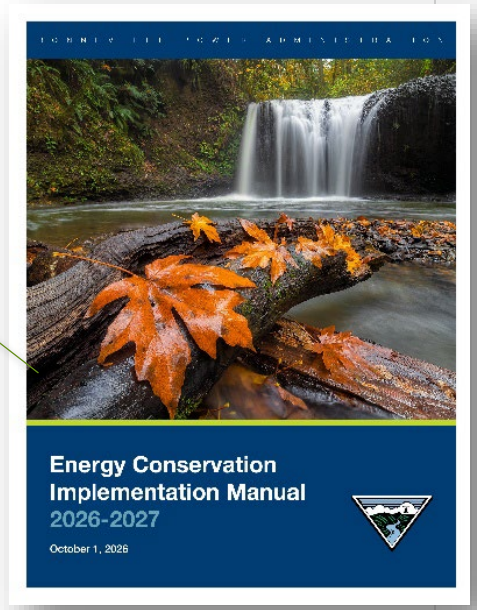
Marketing Team Publications

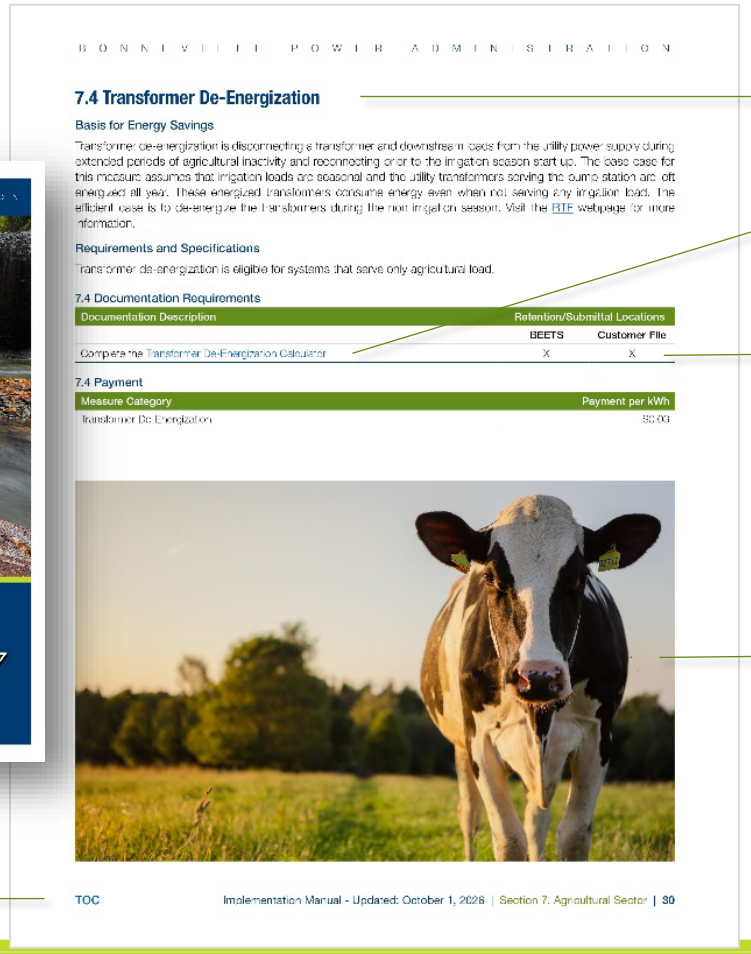
- Energy Efficiency Implementation Manual.
- Energy Conservation Annual Review.
- Energy Efficiency Action Plan.
- Energy Efficiency Utility Quickstart Guide.



Getting Better All the Time

Keep the feedback coming!





PRINTER-FRIENDLY MARGINS

IMPROVED FORMATTING

DIRECT LINKS

CLEANER TABLE DESIGN

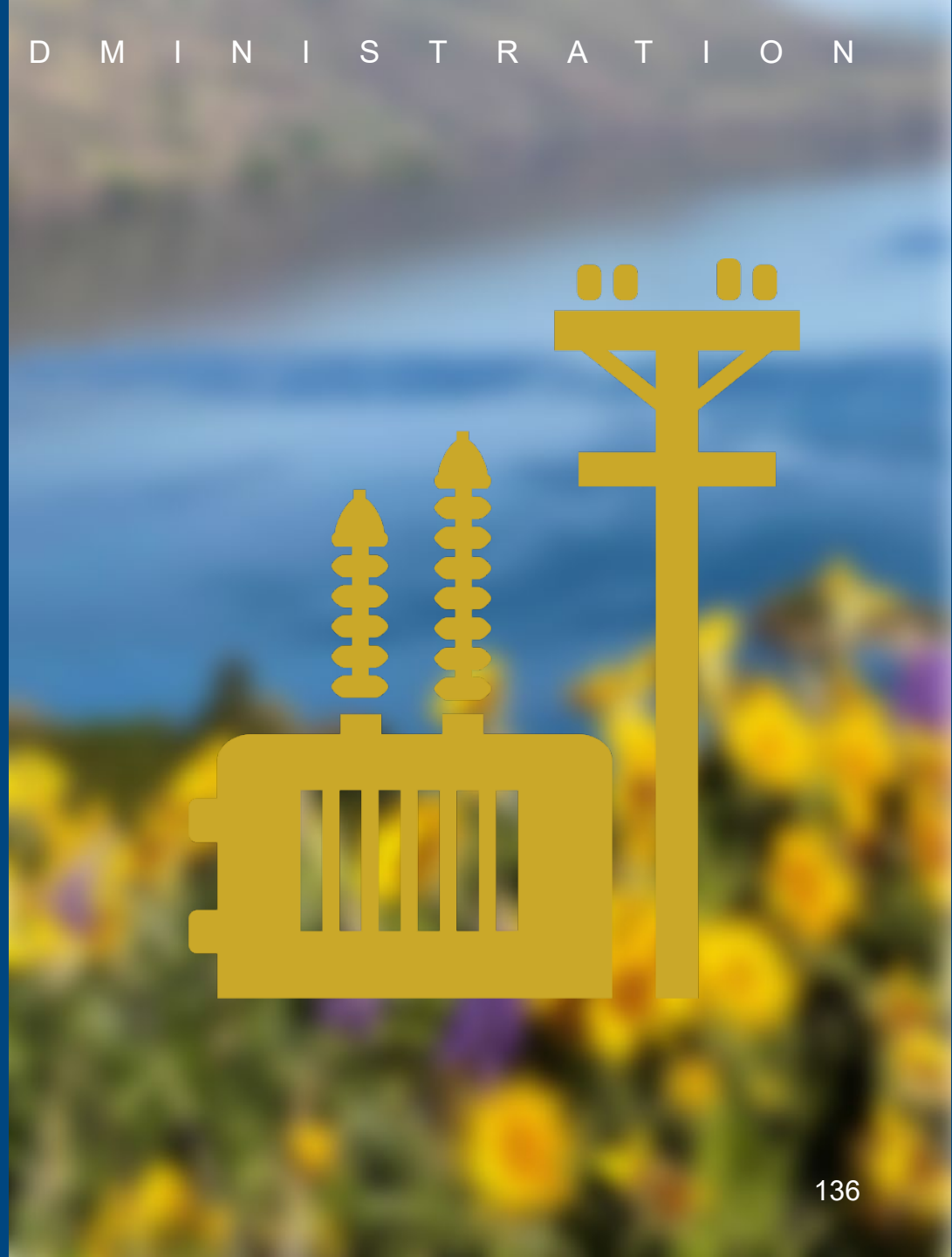
IMAGES… ESPECIALLY COWS!

TEXT ANCHORS AND DATESTAMPS

Utility Upgrades

Tony Koch

Energy Conservation Mechanical Engineer



2027-2028 Strategic Priorities

- Continue to encourage Re-conductor & Transformer Measures.
- Renew Marketing for Conservation Voltage Reduction (CVR) projects
- Sunset Daily Demand Voltage
- Reduction (D-DVR) Pilot Program.



Implementation Manual – Section 12

Two main groups: FY27+=

1. **Re-conductor & Transformers (35-year measure):**

2. **$0.38/kWh**

   - Several other measures: voltage increase, power factor correction, etc. but they

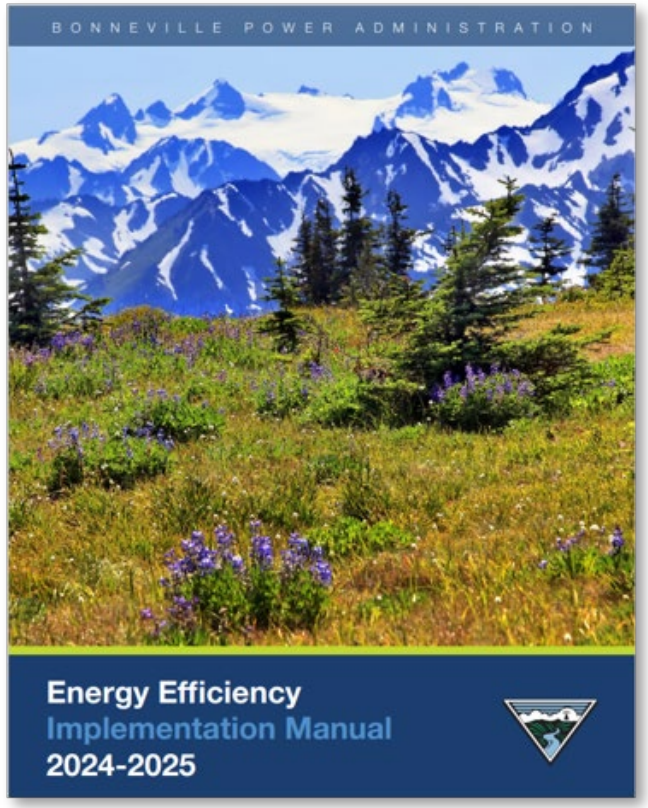
   - are infrequently submitted/reported

3. **CVR (10-year measure life):**

4. **$0.33/kWh** incentive

   - Conservation Voltage Reduction,

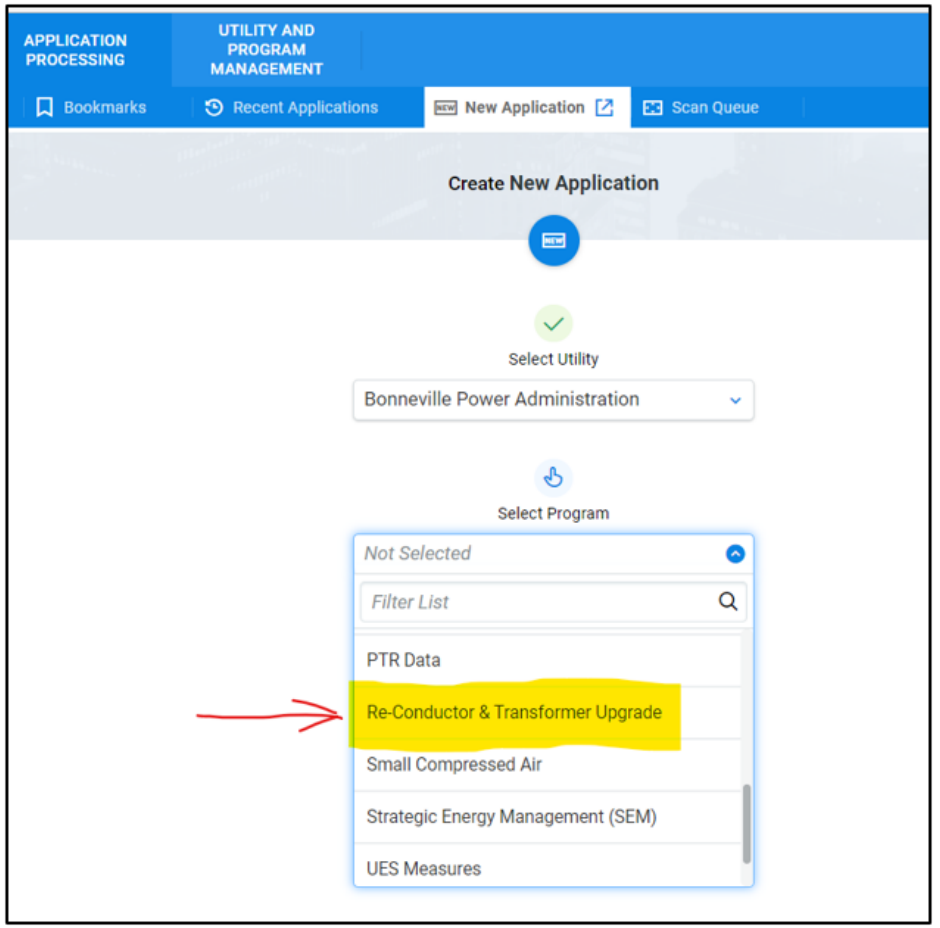
   - To avoid confusion will remove ~~**VO (Voltage Optimization)**~~ as synonym to CVR



Reconductor-Transformer (RT) Calculator: Program in BEETS

What is it?

- Streamlined process for these two measures, an alternative to custom project submittal.
- Project support document files can be attached to the calculator (all in 1 file).
- More automated data entry fields.
- Can handle up to 6 transformer and 6 reconductor measures in 1 file.



Reconductor Measures may also be Custom Projects

- Complex reconductor projects can-not be addressed via RT Calculator.
- We leverage Load-Flow models executed by utility engineers or consultants.
- Outputs from the model (Peak kW Loss) are used to calculate Energy Savings.
- Tony Koch prepares the Custom Project details and enters into BEETS.

Utility Project Submittals in FY26

	FY26 Utility Distribution Projects Entered in Beets as:	Measure Type	Annual Savings (kWh/Year)
Benton REA	Re-Conductor & Transformer	Reconductor	454,243
Fall River	Re-Conductor & Transformer	Reconductor	726
Inland	Re-Conductor & Transformer	Reconductor	314,614
Lower Valley	Re-Conductor & Transformer	Reconductor	1,232
Mason 3	Re-Conductor & Transformer	Reconductor	204,892
Okanogan PUD	Re-Conductor & Transformer	Power Transformer Replacement	306,317
Oregon Trail	Re-Conductor & Transformer	Reconductor	50,009
Ravalli County	Re-Conductor & Transformer	Reconductor	6,922
Skamania	Re-Conductor & Transformer	Reconductor	269,312
Snohomish	Custom Projects Option 2	Reconductor	35,674
South Side	Re-Conductor & Transformer	Reconductor	258,847
Vera	Re-Conductor & Transformer	Power Transformer Replacement	93,434
Vigilante	Re-Conductor & Transformer	Reconductor	39,869
		Total (kWh/year)	**2,036,091**
		aMW	**0.23**

CVR Projects In Flight

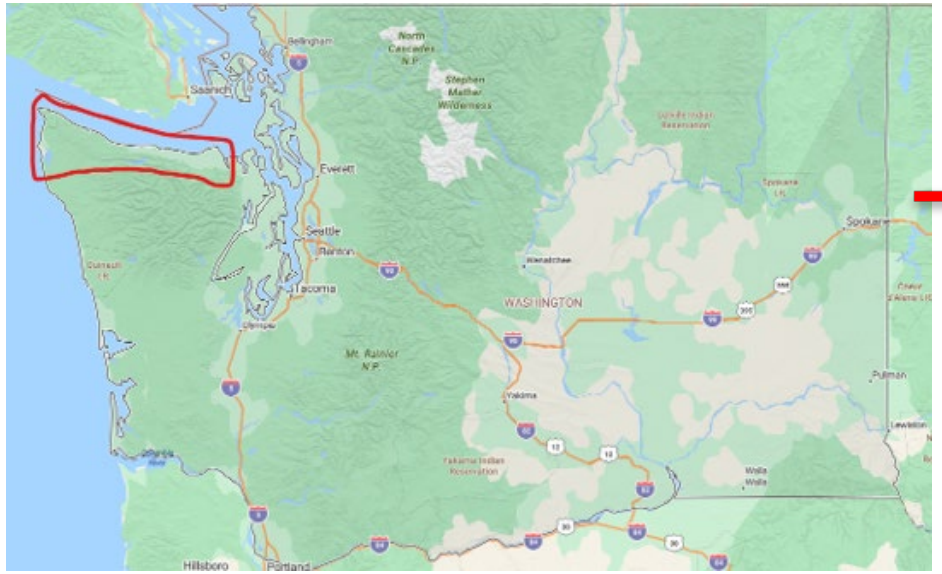
- Clallam PUD
- Lower Valley Energy
- Benton PUD

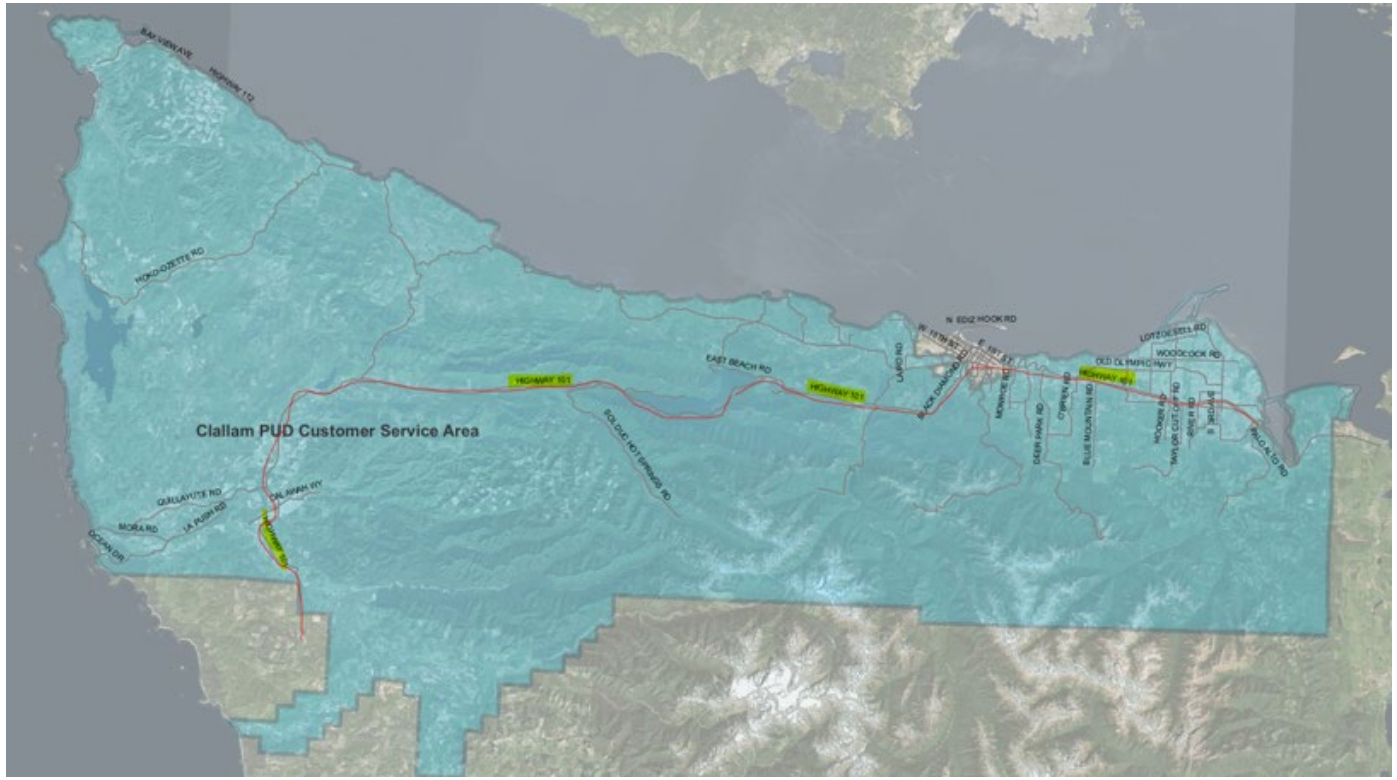






Clallam PUD



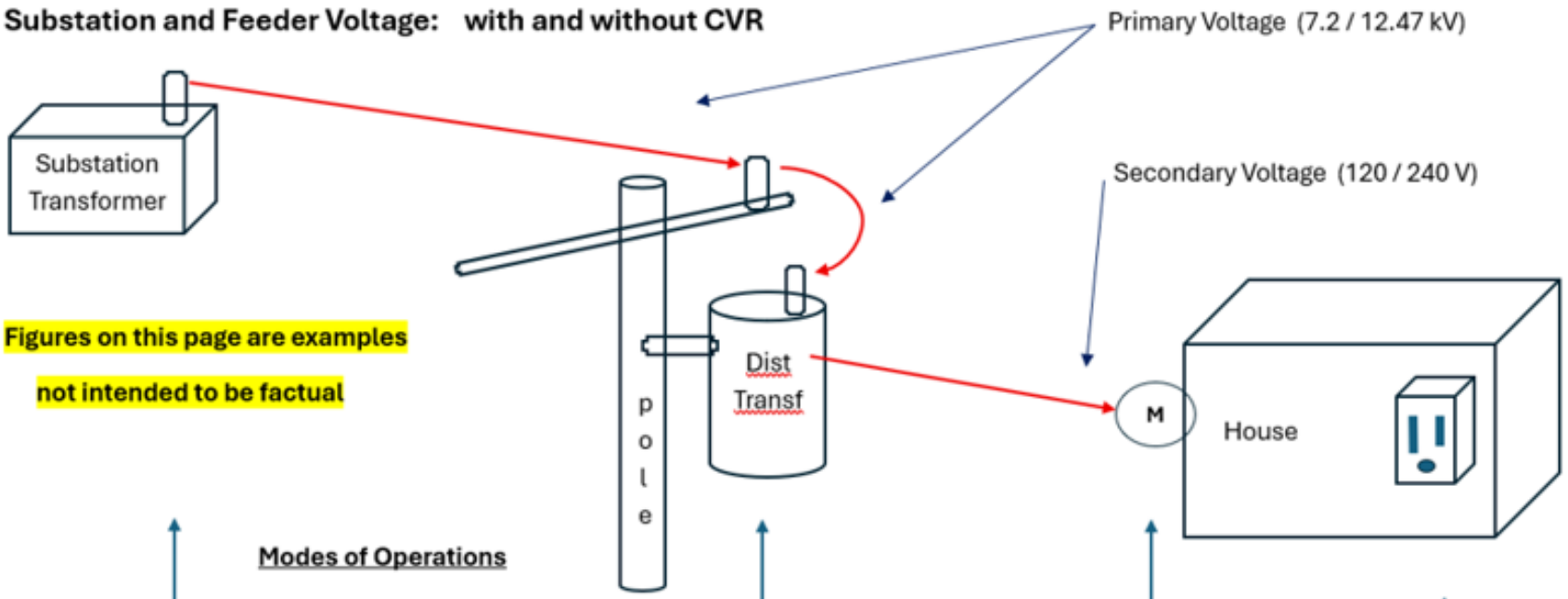


Serves 30,000 customers. Including 4 sovereign tribes. Total load of 80 aMW

Clallam PUD: Deploying CVR Projects with AMI Data

- Clallam has traditionally implemented CVR using Primary near end of line voltage
- The PUD is currently in CVR-factor data gathering for two substations
- CVR-factor calculation relies on turning the CVR voltage setting On and Off on a daily-basis. A CVR-factor is calculated, usually using ~6 months of daily On / Off data, for a specific substation, and reflects the native load of the substation
- Two substations scheduled to book energy saving in FY27:
  - Total of: **~800,000 kWh/year** **$265,00 EEI**
- The following page illustrates some different CVR operating modes

Substation and Feeder Voltage: with and without CVR



Figures on this page are examples

not intended to be factual

Modes of Operations

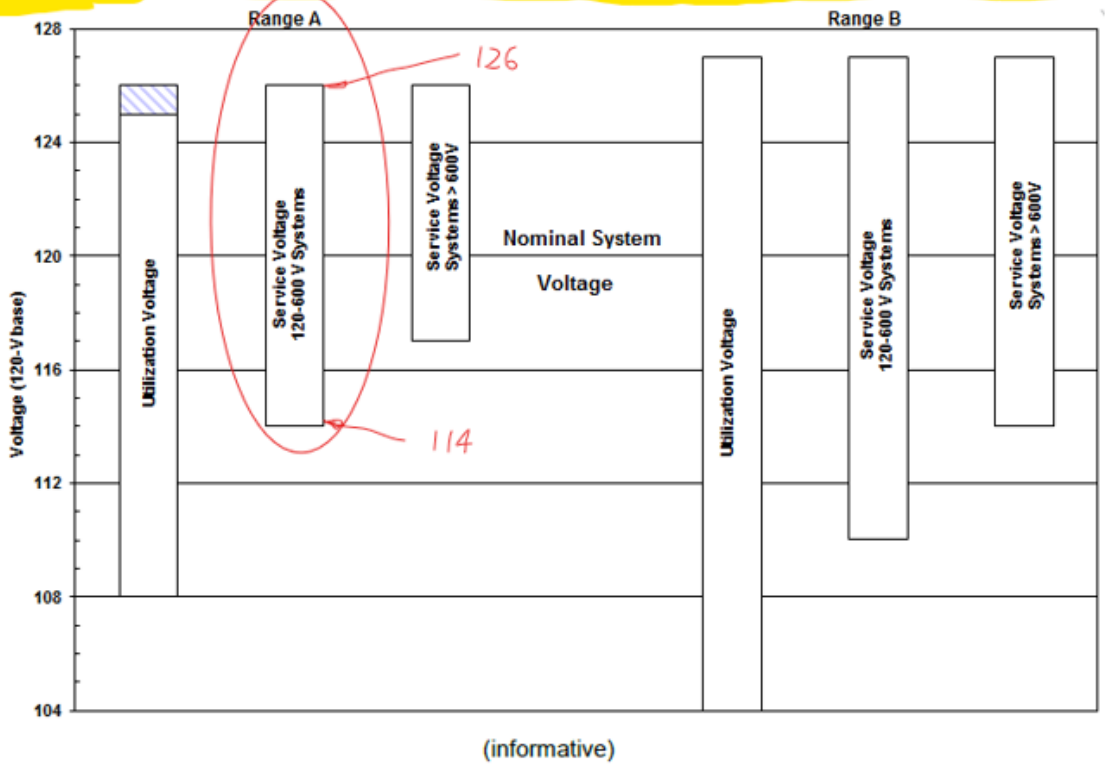
Max: 126 V	**ANSI C.84.1 Max & Min**	**Min: 114 V**	**Min: 110 V**
122 – 124 V **123 Avg**	**Typical non-CVR operation**	**121 – 122 V** **121 Avg**	**120 – 122 V** **120 Avg**
120 Avg	**2-3V Reduction CVR target: 118 EOL** Uses radios to communicate EOL voltage to sub	**117 Avg**	**116 Avg**
118 Avg	**4-5V Reduction CVR with AMI voltage feedback** Eliminates the need for EOL radios	**115 Avg**	**114 Avg**

Annex B

Illustration of Voltage Ranges of Table 1

Figure B1 shows the basis of Range A and Range B limits of table 1. The limits in table 1 were determined by multiplying the limits shown in this chart by the ratio of each nominal system voltage to the 120V base. [For exceptions, see note (c) to Figure B1.]

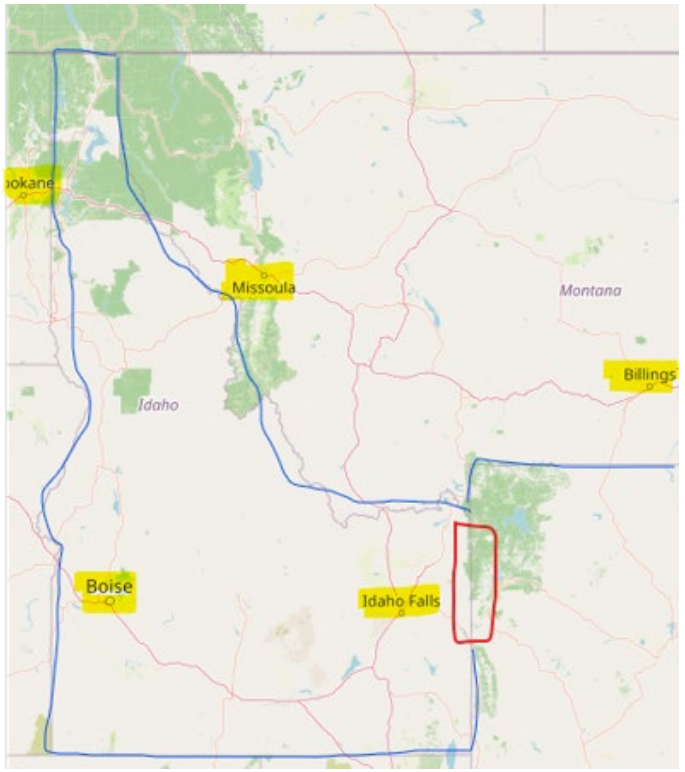
A technique commonly called Conservation Voltage Reduction (CVR) is sometimes used for energy and or demand reduction. Determination of the value of CVR is beyond the scope of this Standard. However, it is recommended that the application of CVR should be limited to voltages in Range A for normal operation. Range B should be reserved for emergency, infrequent operation. CVR systems should not be designed to operate below Range B for any condition.

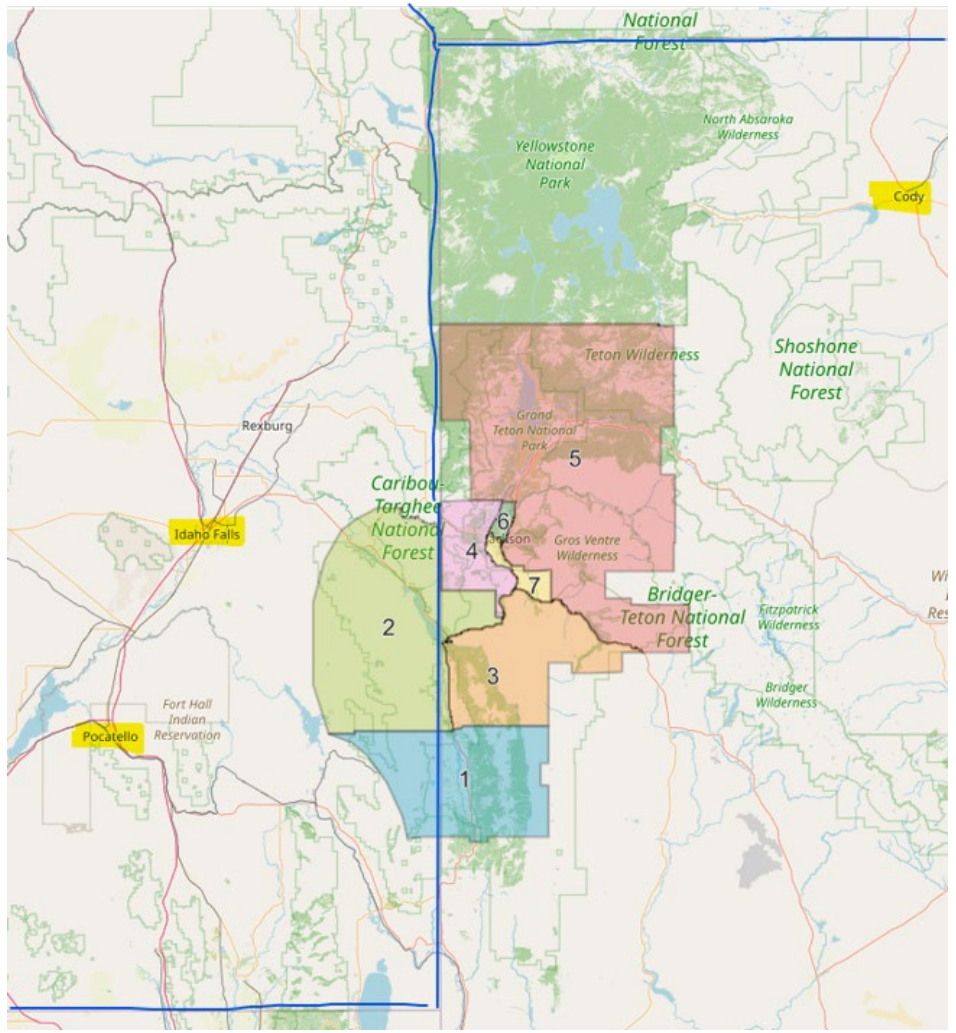


(informative)

Figure B1

Lower Valley Energy





Serves 36,000 customers. Total load of 116 aMW

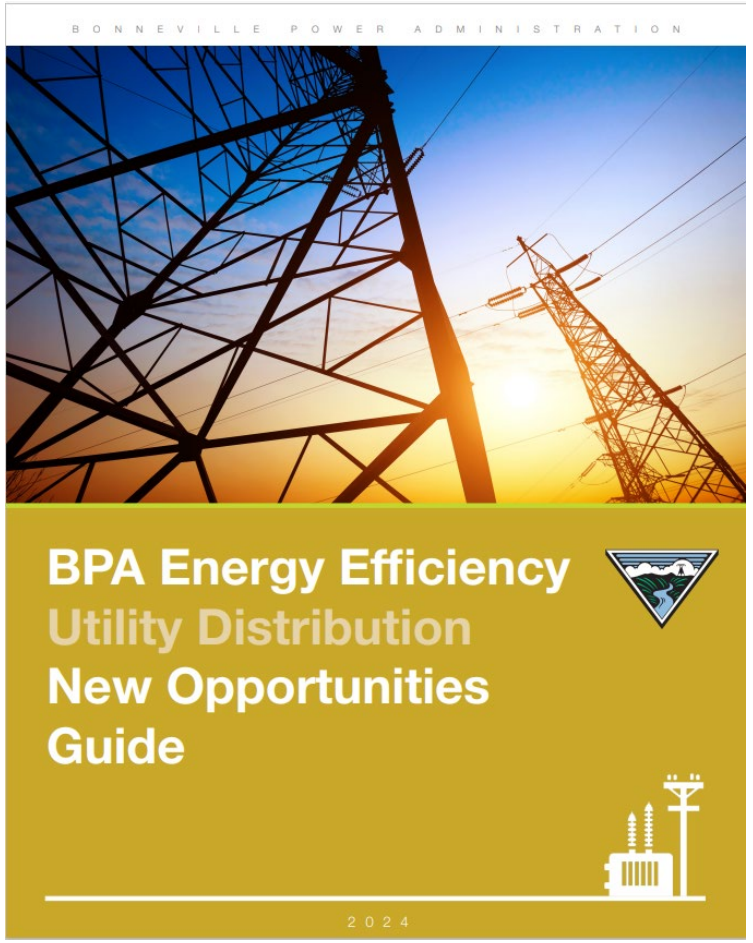
Lower Valley Energy: Seasonal, System-Wide CVR Project

- Total service area: 17 substations
- Run CVR on all substation but one (due to an industrial load)
- Deploy approximately a 2% voltage reduction: April – October
  - Operate normal (baseline) voltage November - March
- Estimated energy savings: **4,000,000 kWh/year (0.46 aMW) $1,300,000 EEI**

Utility Distribution: New Opportunities Guide

A marketing document to share with other staff…

https://www.bpa.gov/-/media/Aep/energy-efficiency/utility-toolkit/uds-nog.pdf





Contact Info for Technical Customer Service Support

Tony Koch, PE, CEM

Mechanical Engineer

jakoch@bpa.gov

206.220.6777

Questions?

- Thank you ☺

Break

30 minutes



Northwest Energy Efficiency Alliance &
Regional Technical Forum

Brice Lang

Energy Conservation Account Executive



Northwest Energy Efficiency Alliance (NEEA)

- NEEA is a non-profit organization funded by over 140 utilities that works to transform markets for energy efficient products and practices.
- BPA is NEEA's biggest funder along with most of the Investor Owned Utilities in the region.
- NEEA accounts for about 25% of BPA's conservation savings in recent rate periods at a much lower per kWh cost than BPA programs.
- NEEA is governed by a Board of Directors made up of NEEA funders.
- There are several NEEA committees that also guide NEEA's activities.



How NEEA Operates

- NEEA works upstream with manufacturers, distributers, retailers, trade associations, code officials, architects, and others in supply chains to transform markets.
- NEEA claims savings by conducting program evaluations that prove out NEEA's influence by documenting program activities and collecting market data.



NEEA's Portfolio – Residential

- Advanced Heat Pumps
- Dual Fuel HVAC
- Heat Pump Water Heaters
- Retail Product Portfolio



Commercial & Industrial

- Advanced Commercial Water Heating
- DOAS
- Efficient Fans
- Extended Motor Products
- Luminaire Level Lighting Controls



Specially Funded Projects

- End Use Load Research
- Commercial Whole Building
- Load Flexibility



Research and Evaluation

- NEEA conducts research and evaluation for market intelligence and savings estimation.
- Some of this research requires utility coordination and contacting utility customers and contractors.
- NEEA notifies BPA (ECAEs) of future research activity that touches utilities or their customers.
- NEEA notifies utility contacts of research that will touch end use customers and allow for opt outs.

Regional Technical Forum (RTF)

- The RTF has been a committee of the Power Council since 2000.
- 29 voting members.
- Standardizes measure development, specifications, protocols.
- Most of BPA's UES measures are developed by RTF.
- BPA generally adopts RTF measures and updates.



RTF Recent and Upcoming Activity

- Updating and developing new Air Source Heat Pump measures.
- In September, updated smart thermostat savings to 0 savings.

RTF Participation

- RTF are public meetings, open to utility participation.
- The voices of utilities can be effective at influencing RTF votes.
- Consider calling into a future meeting and respond to BPA calls to action.

Questions?

- Thank you ☺

Utility Roundtable

Part 2





Let's Hear From You!

- Successes
- Barriers
- Goals
- How can we help?

Wrap Up!

EFX

Surveys



Efficiency Exchange 2027

Save the date for EFX27 in Wenatchee, WA, May 18–19, 2027



Exit Survey

Bonneville
POWER ADMINISTRATION

Adjourn – Safe Travels

THANK YOU!

