



# Energy Efficiency Audit and Resultant Program Changes

Sept. 25, 2025



# Background

- From mid 2024 to mid 2025 BPA's Energy Efficiency organization was subject to an internal controls audit.
- This audit was an inclusive review of all BPA program controls and focused on ensuring BPA had sufficient rigor in its conservation acquisition process.
- This audit is complete and will result in a number of changes to BPA's Energy Efficiency program.

# Forthcoming Implementation Manual Changes

The following changes  
will be in effect as of  
April 1, 2026



# Cost Documentation

## Requirement

### Non-Income Qualified Portfolio

Require utilities to submit cost documentation with each application

Depending on the measure, documentation will include information such as:

- Installed cost
- Quantity
- Labor and materials
- Equipment Model number
- Equipment rating (size, horsepower, flow rate, AHRI designation, capacity, SEER, U-value, etc.)

The specific information that must be documented for each measure will be detailed in the Implementation Manual. The requirement for modeled cost, new construction and large retrofits. are defined by 's [Custom Project Cost Documentation Guidelines](#).



# Cost Documentation

## Income Qualified Portfolio

- Effective Oct. 1, 2025, Energy Efficiency will require a breakout of measure and repair costs and cap total repair costs.
- Effective April 1, 2026, Energy Efficiency will require documentation of both measure and repair costs to be submitted at the time of application submission.

# Cost Documentation

## Implementation

- BEETS was not designed to support large scale documentation upload. Energy Efficiency will engage its systems vendor on potential implementation paths.
- Energy Efficiency will work to minimize administrative burden as much as possible.
- As the process is drafted BPA will seek customer feedback.
- BPA will not review 100% of documents in detail; document review will follow oversight policy.

# BPA Site Inspections

## Requirement

Energy Efficiency will complete on-site verification of UES installation(s) on targeted measures in at least five utility service territories each year based on installation complexity, representation in the program portfolio, cost, and/or issues identified during past oversight results.

## Implementation

- On site inspections will be conducted by BPA Engineering staff or contractors hired by BPA.
- Energy Efficiency's Contract Administration staff PE will review all documentation created during these reviews.
- Site inspections will be conducted after approval and payment; corrections will be used to address noncompliant measures.

# Utility Site Inspections

## Requirement

- Energy Efficiency will work with utilities to conduct at least five utility site inspections per year in targeted measure categories completed by targeted utilities.
- For selected site inspections Energy Efficiency will request customers conducting site inspections to upload completed on-site verification findings in BEETS.

## Implementation

- Utility site inspections will not be required on any measure.
- Customers will be asked to indicate if they have performed a site inspection.
- For measures where a site inspection is performed BPA may request customers upload documentation.



# Tracking User Data

## Requirement

- For bulk measures, Energy Efficiency will require users to enter their name in BEETS at the time of application submission.
- Energy Efficiency PE will issue a communication to customers noting that BPA expects individual users of the BEETS system will have individual accounts and reinforce the process of establishing a BEETS account.

## Implementation

- BEETS does not natively capture submitter information for bulk measures.
- Capturing this information will require updates to either the system or upload template.



# Questions and Discussion

