



October 2025

Implementation Manual Changes

June 26, 2025



Rate Period and Reporting and General IM Changes

Dave Moody, Deputy Vice President



IM Publication and Reporting

- **Effective October 1, 2025**
 - The term Program Compliance Specialist (PCS) replaces Contracting Officer's Technical Representative (COTR).
 - The term Income Qualified replaces Low Income.
- **Effective October 1, 2027**
 - Publish an Implementation Manual (IM) update that is inclusive of all changes occurring over the previous two years. This includes changes resulting from the 9th Power Plan, scheduled to be published in 2026.



Effective October 1, 2025

- **2.1.5 Performance Payments**
 - Changes definition of Small, Rural, Residential (SRR) customers from fewer than 10 customers per mile to fewer than 12 customers per mile.
- **3.2 Reporting Requirements**
 - Requires that measures/projects be submitted within 180 calendar days of completion date.
 - Requires that invoice for payment within 60 calendar days of BPA approval.
 - Requests reporting occur at least once every six months.
- **4.1 Custom Projects Payment Rate**
 - Returns the Commercial new construction incremental cost percentage eligibility.
 - Increases Nonresidential Lighting incentive from \$0.13 per kWh to \$0.25 per kWh.
- **5.1 Custom Programs Payment Rate**
 - Increases Nonresidential Lighting incentive from \$0.13 per kWh to \$0.25 per kWh.
- **6.2 Measure Distribution Channels**
 - Expires the “By Request” measure distribution channel.

Questions?



Agriculture

David J. Lee, Agricultural and Federal Sector Lead



Payments - Effective October 1, 2025

Measure #	Measure Name	Existing Payments	New Payments
7.5.1	Irrigation System Conversion: LESA/LEPA/MDI (Low Elevation Spray Application/Low Energy Precision Application/Mobile Drip Irrigation)	\$18 per drop	▲ \$23 per drop
7.5.2	High-Pressure Sprinkler Package Replacement	\$16 per package	▲ \$18 per package
7.5.2	MESA (Mid-Level Elevation Spray Application) Sprinkler Package Replacement	\$15 per package	▲ \$21 per package
7.5.2	LESA/LEPA/MDI (Low Elevation Spray Application/Low Energy Precision Application/Mobile Drip Irrigation) Sprinkler Package Replacement	\$7 per package	▲ \$10 per package
7.5.3	Irrigation System Low-Pressure Conversion: High-Pressure to Low-Pressure, Wheel-line or Hand-line	\$16 per package	▲ \$23 per head
7.5.3	Irrigation System Low-Pressure Conversion: High-Pressure to Low-Pressure, Center-pivot or Lateral-move	\$18 per drop	▲ \$26 per drop
7.6.2	Variable Frequency Drive for Agricultural Centrifugal Pumps (BPA-Qualified)	\$70 per horsepower	▲ \$95 per horsepower
7.6.3	Variable Frequency Drive for Agricultural Turbine Pumps (BPA-Qualified)	\$100 per horsepower	▲ \$135 per horsepower
7.6.4	Variable Frequency Drive for Agricultural Centrifugal Pumps (BPA-Qualified)	\$70 per horsepower	▲ \$95 per horsepower
7.6.4	Variable Frequency Drive for Agricultural Turbine Pumps (BPA-Qualified)	\$100 per horsepower	▲ \$135 per horsepower
7.6.5	New Agriculture Pump Efficiency Upgrade (BPA-Qualified)	\$70 per horsepower	▲ \$95 per horsepower

Questions?



Commercial

Eric Mullendore, Commercial and Industrial Sector Lead



Payments - Effective October 1, 2025

Measure #	Measure Name	Existing Payments	New Payments
8.4.2	Connected Thermostat- Electric Heat	\$150	▲ \$300
8.4.4	Air-Source Heat Pump Retrofit and Upgrade, Retrofit	\$700	▲ \$1,000
8.4.5	Variable Refrigerant Flow System, Retrofit	\$1,000	▲ \$1,500
8.4.6	Variable Frequency Drive on Air Handling Unit Fan	\$300	▲ \$500
8.4.7	Commercial Packaged Terminal Heat Pump, Retrofit	\$600	\$150 ▼
8.4.7	Commercial Packaged Terminal Heat Pump, New Construction	\$100	\$50 ▼
8.4.8	Demand-Controlled Kitchen Ventilation Equipment, New or Retrofit – One control sensor	\$200	▲ \$400
8.4.8	Demand-Controlled Kitchen Ventilation Equipment, New or Retrofit – Multiple control sensors	\$400	▲ \$800
8.4.9	Heat Recovery Ventilation Equipment, Tier 1 Unit with $\geq 70\%$ SRE	\$2	▲ \$2.50
8.4.9	Heat Recovery Ventilation Equipment, Tier 2 Unit with $\geq 82\%$ SRE	\$3.50	▲ \$4
8.7.1	Generator Block Heaters, Size <3 kW	\$200	▲ \$400
8.7.1	Generator Block Heaters, Size ≥ 3 kW	\$1,500	▲ \$2,000
8.7.3	Consumer Heat Pump Water Heater for Commercial Applications, Tier 3 – Any size tank	\$800	▲ \$1,600
8.7.3	Consumer Heat Pump Water Heater for Commercial Applications, Tier 4 – Any size tank	\$900	▲ \$1,800
8.7.3	Consumer Heat Pump Water Heater for Commercial Applications, Split-System – Any size tank	\$1,100	▲ \$2,200

Savings - Effective October 1, 2025

Measure #	Measure Name	Existing Busbar Savings	New Busbar Savings	
8.3.2	Midstream Lighting, HID	67-160 kWh	▲	68-178 kWh
8.4.2	Connected Thermostats, Electric Heat (combined five measure RefNos into <u>one</u>)	Varied	▲	352-132 kWh
8.4.7	Commercial Packaged Terminal Heat Pump	1,042-2,076 kWh		120-404 kWh ▼
8.5.1	Commercial Insulation (combined several measure RefNos)	see Advanced Change Notice – UES Measure List Update – for details		
8.5.2	Commercial Windows (Heating Zones 2 and 3 combined)	Varied	▲	Varied ▼
8.7.1	Generator Block Heaters	1,102-15,425 kWh	▲	1,410-4,052 kWh ▼
8.7.2	Vehicle Engine Block Heater Control	2,167 kWh	▲	2,784 kWh
8.7.3	Consumer Heat Pump Water Heater for Commercial Applications	803-3,855 kWh	▲	798-3,940 kWh ▼

Measure Changes - Effective October 1, 2025

- **8.3.1 Lighting Calculators**
 - Lighting Calculator Versions

Lighting Calculator Series Name	Allocation	Effective Date	End Date*
Online Lighting Calculator	RP FY24 FY25	April 1, 2025	September 30, 2025
Online Lighting Calculator	RP FY26 FY27	October 1, 2025	September 30, 2027

* End date for OLC Allocation period indicates the date that the project must be created.

- **8.3.2 Midstream Lighting**
 - Light-Emitting Diode (LED) tube and linear replacement product measures are ineligible in Oregon.

OLC Updates – Effective October 1, 2025

Revised Incentives within OLC Allocation RP FY 26 – FY 27

Measure Series	Allocation 24-25	Allocation 26-27	
Series A: Small Lamp/Fixture	\$2-5	\$4-10	↑
Series B: LED Tubes (Type A)	\$2	\$4	↑
Series O: LED Tubes (Type B/C)	\$8	\$12	↑
Series C: LED General Indoor/Outdoor*	\$20-\$210	\$40-\$280	↑
Series D: LED High Bay*	\$80-\$620	\$160-\$800	↑
Series E: LED Exterior	\$30-\$500	\$60-\$800	↑
Series F: HID Screw-in Replacement	\$20-\$150	\$40-\$300	↑
Series G: LED Linear	\$0.13	\$0.25	↑
Series H: LED Exit Signs	\$20	\$30	↑
Series I: Signage	\$0.13	\$0.25	↑
Series J: Decommissioning	\$0.13	\$0.25	↑
Series K: Non-standard Measures	\$0.13	\$0.25	↑
Series L: Controls**	\$10-\$50	\$20-\$200	↑
New Construction	\$0.13	\$0.25	↑

* Removes Networked Lighting Control Options
 ** Adds Luminaire Level Lighting Control Measure

OLC Updates – Effective October 1, 2025

Revised Requirements within Allocation RP FY 26 - FY 27

Requirement	Allocation 24-25	Allocation 26-27
Minimum B/C Ratio	0.5 for all projects	0.5 for projects >200,000 kWh
Minimum Wattage Reduction (Retro)	25%	10%
Minimum Wattage Reduction (NC)	20%	10%

- Adds an eligibility requirement to the list of scenarios that require project to be considered new construction: Replacement lamps for the facility's existing lighting fixtures are no longer available due to federal or state restrictions (e.g., the ban on the sale of fluorescent lamps in Oregon).

Measure Changes - Effective October 1, 2025

- **8.6 Commercial Refrigeration (Renumbered the section)**
- **8.6.2 Efficient Refrigeration Fan Motors**
 - Removes fan blade size requirement for walk-in fan motors.
- **8.7.1 Generator Block Heaters**
 - Revises Documentation Requirements table to remove “make, model, and installed cost” requirement.
- **8.7.3 Consumer Heat Pump Water Heater in Commercial Applications**
 - Removes the Pre-condition requirement that the equipment replace an existing electric resistance water heater.

Measure Changes - Effective October 1, 2025

Revised Documentation Requirements (table) adds “attestation alternative to invoice” and removes “make, model, and installed cost” requirements for these measures:

Section	Measure Name
8.4.3	Ductless Heat Pump Retrofit and Upgrade
8.4.4	Air-Source Heat Pump Retrofit and Upgrade
8.4.7	Commercial Packaged Terminal Heat Pump
8.4.8	Demand-Controlled Kitchen Ventilation
8.4.9	Heat Recovery Ventilation Equipment
8.7.5	Efficient Pumps
8.7.6	Variable Frequency Drive for Pumps

Measure Changes - Effective October 1, 2025

Attestation Alternative to Invoice

Documentation that the reported equipment was installed. Installation documentation could include an invoice and/or a signed attestation with the following elements:

- Installation address.
- Equipment order, purchase, or installation date.
- Equipment make and model number.
- Contact information for the signatory.

Measure Consolidation - Effective October 1, 2025

- **8.4.2 Connected Thermostat**
 - Expires verification measures.
- **8.5.1 Commercial Insulation**
 - Combines Heating Zones 2 and 3 with savings reflecting weighted average.
 - Expires R5-R30 and R5-R49 Attic/Roof measures.
- **8.5.2 Commercial Windows**
 - Combines Heating Zones 2 and 3 with savings reflecting weighted average.

New Measure – Effective October 1, 2025

- **8.6.3 Evaporator ECM Fan Controller for Walk-In Coolers and Freezers**

Basis for Energy Savings:

This measure is for walk-in coolers and freezers with evaporators equipped with electronically commutated motors (ECM). ECM controllers sense the operation status of the cooling system and control the speed of the evaporator fans. When the thermostat temperature is satisfied and the compressor cycles off, the controller will sense the compressor off cycle and will switch the motor to a slower speed.

Requirements and Specifications:

This measure applies to retrofits and new construction.

Pre-conditions:

- Walk-in coolers and freezers evaporator refrigeration systems with motor input power categories either ≤ 23 Watts or > 23 Watts.
- The controlled motor(s) did not previously have a motor speed controller installed.

Post-conditions:

- The installed ECM controller is reducing motor speed and wattage.
- The controller cycles the motor between “Hi/Lo” speeds or powers it “ON/OFF” when there is no call for cooling.

New Measure – Effective October 1, 2025

- 8.6.3 Evaporator ECM Fan Controller for Walk-In Coolers and Freezers (continued)**

Documentation Requirements:

Documentation Description	Retention/Submittal Locations	
	BPA Energy Efficiency Tracking System	Customer File
Consumer identifying information including unique site ID and address	X	X
Documentation that the reported equipment was installed. Installation documentation could include an invoice and/or a signed attestation with the following elements: <ul style="list-style-type: none"> • Installed address; • Equipment order, purchase, or installation date; • Equipment make and model number; and • Contact information for the signatory. 		X

Payment:

Measure Category	Payment Per Motor
Evaporator ECM Fan Controller for Walk-In Coolers and Freezers, ≤23 Watts	\$60
Evaporator ECM Fan Controller for Walk-In Coolers and Freezers, >23 Watts	\$120

Questions?



Industrial

Eric Mullendore, Commercial and Industrial Lead



Measure Changes - Effective October 1, 2025

- **10.3 Energy Management (section renumbered)**
- **10.3.2.1 Strategic Energy Management Legacy (September 30, 2025 expiration)**
 - Note: Multiyear Strategic Energy Management remains active.
- **10.3.2 Multiyear Strategic Energy Management**
 - Removes the SEM Calculator requirement, with the expiration of SEM Legacy measure.
- **10.3.3 Performance Tracking System**
 - Consolidates the two measures into one.
 - Updates the Payment table:

Measure Category	Payment Lesser of Per –Two-Year Performance Period
Performance Tracking System	PTS costs, \$25,000, or utility-specified cap

Measure Changes - Effective October 1, 2025

- **10.4.1 Variable Frequency Drive for Fans in Potato and Onion Storage Facilities**
 - Adds the maximum threshold for qualifying fan VFD horsepower is equal to or less than 250.
 - Adds clarification on how to calculate the payment based on the total fan VFD horsepower installed on a per-building basis.
 - Returns the Payment table.

Measure Category	Payment Per Horsepower
Variable Frequency Drive for Fans in Potato and Onion Storage Facilities	\$200

Calculators – Effective October 1, 2025

- **Strategic Energy Management Calculator – Expired**
- **Performance Tracking System Calculator (optional)**
 - One measure.
 - Allows for multiple payments to assist with tracking within the two-year performance period.

Questions?



Residential

Jonathon Belmont, Residential Sector Lead



Effective October 1, 2025

Correction

- **11.7.4 BPA Energy Efficient New Multifamily Construction (BPA-Qualified)**

Basis for Energy Savings

The base case (pre-existing state) is a representative sample of dwelling units built to the 2025 Energy Code cycle by state. Energy savings for this measure is based on analysis of efficiency improvements needed to exceed state code by at least 10% resulting in a dwelling unit that is a minimum of 10% more efficient than code.

- **11.7.5 BPA Zero Energy Ready New Multifamily Construction (BPA-Qualified)**

Basis for Energy Savings

The base case (pre-existing state) is a representative sample of dwelling units built to the 2025 Energy Code cycle by state. Energy savings for this measure is based on analysis of efficiency improvements needed to exceed the code by at least 25%, resulting in a dwelling unit that is a minimum of 25% more efficient than code.

Effective October 1, 2025

Requirements Changes

- **Section 11 Residential Sector**

- Requires entry for Installed Costs in BEETS for all Residential measures.
- For New Construction measures below, please enter \$0 or actual installed cost if available.
 - 11.7.1 New Northwest Energy Efficient Manufactured Housing
 - 11.7.2 Replacement of Pre-1976 Manufactured Home with NEEM Certified Home
 - 11.7.3 Single-Family New Construction Performance Path
 - 11.7.4 BPA Energy Efficient New Multifamily Construction (BPA-Qualified)
 - 11.7.5 BPA Zero Energy Ready New Multifamily Construction (BPA-Qualified)
- More detailed guidance document forthcoming.

- ***This requirement does not apply to Low Income (Income Qualified) measures. Low Income (Income Qualified) Measure Costs require entry in BEETS.***

- ***INSTALLED COST ≠ MEASURE COST***

Effective October 1, 2025

Requirements Changes

- **11.4.2 Unitary Heat Pump Water Heater – 40 gallon (BPA-Qualified)**
 - Adds “Allow HPWH in new construction (not available in Oregon or Washington).”
- **11.4.3 Unitary Heat Pump Water Heater – 50 gallon (BPA-Qualified)**
 - Adds “Allow HPWH in new construction (not available in Oregon or Washington).”

Effective October 1, 2025

Requirements Changes

- **11.5.9 Duct Insulation**
 - Clarifies that duct insulation must have a pre-existing condition of “not insulated” to match Regional Technical Forum (RTF) workbook.
- **11.8.2 Prime Window and Patio Door Replacement**
 - Removes Double-Pane Pre-condition “metal frame only.”
- **11.11 Residential Custom Projects**
 - BPA does not develop energy savings estimates for new multifamily construction custom projects that address multiple end uses or whole building measures. BPA may develop energy savings estimates for custom projects that address a single targeted end use, (e.g., central heat pump water heaters). For the whole-building analyses, customers may either leverage the UES measure BPA Energy Efficient New Multifamily Construction or develop and submit a custom project per Section 4 of the Implementation Manual using their own resources.

Effective October 1, 2025

Expiration of Distribution Option

- **Removes “By Request” Measure Distribution Channel**
 - 11.3.1 ENERGY STAR Level 2 Networked Electric Vehicle Chargers
 - 11.4.1 Thermostatic Shut-Off Valves (TSV)
 - 11.6.3 Advanced Smart Thermostats
 - 11.8.7 Door Sweeps

Effective October 1, 2025

Measure #	Measure Name	Existing Payments	New Payments
11.2.1	Clothes Washers	\$25-\$100/unit	↑ \$36-\$125/unit
11.4.2	Unitary Heat Pump Water Heater – 40 gallon (BPA-Qualified)	\$700/unit	↑ \$1400/unit
11.4.3	Unitary Heat Pump Water Heater – 50 gallon (BPA-Qualified)	\$800-\$900/unit	↑ \$1600-\$1800/unit
11.4.4	Split-System Heat Pump Water Heater	\$1100/unit	↑ \$2200/unit
11.5.1	Ductless and Ducted Mini-Split Heat Pumps	\$800/unit	↑ \$920/unit
11.5.2	Air-Source Heat Pump Conversion from Electric Forced-Air Furnace to Air-Source Heat Pump	\$1000/unit	↑ \$1250/unit
11.5.3	Air-Source Heat Pump Conversion from Electric Forced-Air Furnace to Variable-Speed Air-Source Heat Pump	\$1200/unit	↑ \$1560/unit
11.5.4	Variable-Speed Air-Source Heat Pump Upgrade	\$200/unit	↑ \$600/unit
11.8.2	Prime Window and Patio Door Replacement	\$6-\$16/sf	↑ \$8-\$20/sf

Effective October 1, 2025

Measure #	Measure Name	Existing Busbar Savings	New Busbar Savings
11.2.1	Clothes Dryers	191.13 kWh – 517.09 kWh	▲ 253.03 kWh - 569.29 kWh
11.4.3	Unitary Heat Pump Water Heater – 50 gallon (BPA-Qualified)	1470.72 kWh – 1856.62 kWh	▲ 1528.92 kWh – 2063.51 kWh
11.5.1	Ductless and Ducted Mini-Split Heat Pumps	953.83 kWh – 3251.30 kWh	545.28 kWh - 3248.14 kWh ▼
11.5.9	Duct Insulation	1.53 kWh – 1.58 kWh	▲ 2.46 kWh - 3.53kWh
11.6.2	Communicating Line Voltage Thermostats	80.00 kWh	▲ 79.52 kWh - 80.43 kWh ▼
11.8.1	Insulation (<i>Including Exterior Insulated Doors</i>)	0.06 kWh – 4.54 kWh	▲ 0.06 kWh - 4.07 kWh ▼
11.8.2	Prime Window and Patio Door Replacement	7.72 kWh – 18.16 kWh	▲ 8.00 kWh - 23.4 kWh ▼
11.8.3	Low-E Storm Windows	6.94 kWh – 16.29 kWh	▲ 8.42 kWh – 21.48 kWh ▼
11.8.5	Air Sealing	0.26 kWh – 0.27 kWh	▲ 0.37 kWh

Questions?



Low Income

(Income Qualified)

Amy Burke, Low Income Lead



Effective October 1, 2025

- **11.9 Income Qualified Energy Efficiency Measures**
 - Changes name from “Low Income Energy Efficiency” to “Energy Efficiency Income Qualified” throughout the IM.
 - Clarifies that individual multifamily units can income qualify even if the whole complex isn’t income qualified.
 - Adds reference that the Income Qualified Custom Project and Program rates are available to income qualified residents.
 - Adds reference that the Home Energy Report measure is available to income qualified residents with the same payment level.

Effective October 1, 2025

- **11.9 Change in Reference Numbers (RefNos)**
 - Expires Income Qualified Ductless Heat Pump (DHP) RefNos and reissues new RefNos with “Any Cooling Zone” with a weighted average for savings, which may cause some savings to change.
- **11.9 Expiration of RefNos**
 - Expires RefNos for any income qualified advanced thermostat that is not direct-install to align with the IM.
 - Removes only the “By Request” measure distribution channel for Income Qualified Door Sweeps.

Effective October 1, 2025

- **11.9 Clarification of Documentation Requirements for Repair Costs**
 - Adds clarification in the documentation requirements table about an existing requirement to report cost related to repair costs separately on an invoice.

- **11.9 Requiring Two BEETS Fields**
 - Requires **Income Qualified Measure Cost** field in BEETS. *This is separate from the informational installed cost field.*
 - Requires **Income Qualified Repair Cost** field in BEETS; enter \$0 if no repair costs are claimed.

Note: A guidance document will be added to the IM document library with details of reporting requirements for Residential Installed Costs and Income Qualified Measure Cost.

Documentation Description	Retention/Submittal Locations	
	BPA Energy Efficiency Tracking System	Customer File
Proof or an attestation that the end user's income eligibility was reviewed from a verifiable source (e.g., paystub, Section 8 voucher, etc.) or documentation that a self-attestations of income signed by the end-user was reviewed		X
<ul style="list-style-type: none"> • Income qualified measure cost • Repair cost (if applicable) 	X	
Equipment or contractor invoice showing: <ul style="list-style-type: none"> • Equipment order or purchase date • Related repair cost 		X

Effective October 1, 2025

- **11.9 Clarification of Current Repair Cost Policy**

- BPA does not allow the cost of full roof replacements or tear offs to be included within the Income Qualified payment cost cap or as a related repair cost.
- BPA does not allow the cost of extended warranties to be included within the Income Qualified payment cost cap or as a related repair cost.
- Adds an Income Qualified Repair Reference List listing examples of allowable repair costs.

- **11.9 New Related Repair Cost Requirement**

- For an income qualified project with a measure cost of \$1,000 or higher, related repair costs will be capped at 300% of the reported income qualified measure cost. **Example scenarios:**

Measure Type	Income Qualified Measure Costs	Measure Payment Cost Cap	Repair Costs	Repair Cost Cap Allowed	Total Final Payment
Clothes Washers	\$900	Up to \$800	<i>Not allowed</i>	<i>N/A</i>	\$800
Ductless Heat Pump	\$9,000	Up to \$6,000	\$2,000	Up to \$27,000	\$8,000
Duct Sealing	\$1,200	Up to \$750	\$5,000	\$3,600	\$4,350

Effective October 1, 2025

Measure #	Measure Name	Existing Busbar Savings		New Busbar Savings
11.9	Clothes Dryers	191.13 kWh – 517.09 kWh	↑	253.03 kWh - 569.29 kWh
11.9	Unitary Heat Pump Water Heater – 50 gallon (BPA-Qualified)	1470.72 kWh – 1856.62 kWh	↑	1528.92 kWh – 2063.51 kWh
11.9	Ductless and Ducted Mini-Split Heat Pumps	953.83 kWh – 3251.30 kWh		545.28 kWh - 3248.14 kWh ↓
11.9	Duct Insulation	1.53 kWh – 1.58 kWh	↑	2.46 kWh - 3.53kWh
11.9	Communicating Line Voltage Thermostats	80.00 kWh	↑	79.52 kWh - 80.43 kWh ↓
11.9	Insulation <i>(Including Exterior Insulated Doors)</i>	0.06 kWh – 4.54 kWh	↑	0.06 kWh - 4.07 kWh ↓
11.9	Prime Window and Patio Door Replacement	7.72 kWh – 18.16 kWh	↑	8.00 kWh - 23.4 kWh ↓
11.9	Low-E Storm Windows	6.94 kWh – 16.29 kWh	↑	8.42 kWh – 21.48 kWh ↓
11.9	Air Sealing	0.26 kWh – 0.27 kWh	↑	0.37 kWh

Note: There are no planned incentive increases for low income (income qualified) measures for the next rate period.

Questions?





Thank you for your time!

<https://www.bpa.gov/energy-and-services/efficiency/implementation-manual>

