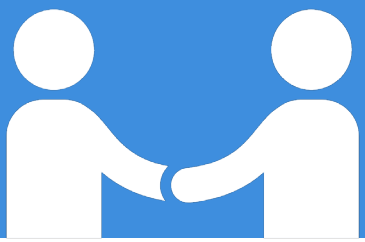
BONNEVILLE POWER ADMINISTRATION

BPA ENERGY EFFICIENCY

LOW-INCOME

NEW OPPORTUNITIES GUIDE



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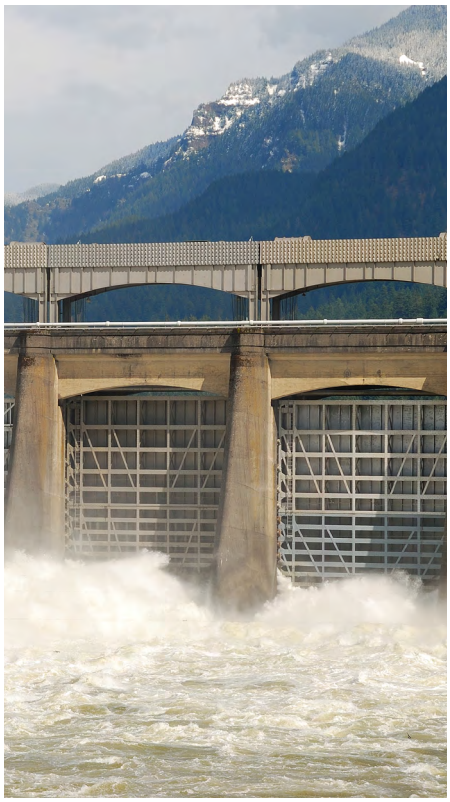
Introduction

This guide is intended to introduce readers to BPA's low-income energy-efficiency pathways and the many groups involved in delivering them, and explain how different types of organizations can get involved. Utilities, Community Action Agencies, or CAAs, or tribes that do not yet have a low-income energy-efficiency program can learn how to get started and find partners that they may be able to work with along the way. The guide also describes how those with an established program can explore new partnerships with others doing similar work in the region. Staff who are new to their organization can use this guide to familiarize themselves with the basics of how each BPA funding source works. The guide concludes with sample materials, a glossary of terms and acronyms, and information to help find other CAAs, utilities and tribal governments in the region that may be interested in low-income energy-efficiency work.

BACKGROUND



Many residents of the Pacific Northwest may be surprised to learn that the second-largest energy resource in the region after hydropower is not coal, natural gas, or wind power, but energy efficiency. In fact, since 1978, the region has met more than half of its load growth with energy efficiency[1]. Bonneville Power Administration, or BPA, and its regional partners work together to continuously increase energy efficiency in the residential, commercial, industrial, agricultural and federal sectors.

Much of this energy savings is accomplished through incentives to and through BPA's public utility customers by providing Energy Efficiency Incentives, or EEI, to utilities for energy-efficiency work. In turn, utilities offer rebates and incentives to their customers to encourage energy-efficiency projects and installations. While energy-efficiency projects typically pay off for homeowners in the long run, installations can involve high upfront costs — making many upgrades more accessible to those with medium to high incomes than to residents with lower incomes and/or those who rent their homes.

For more than three decades, BPA, public utilities, CAAs, tribes and states have worked to improve equitable access to energy efficiency for all Northwest residents. Sometimes this work was performed individually, and sometimes through partnership and collaboration.

In 2014, BPA worked with utilities and public interest groups to establish the Low-Income Energy Efficiency Workgroup, or LIEE Workgroup, to increase understanding of each other's work, share information and best practices, and identify new opportunities for collaboration. By working together, low-income energy-efficiency implementers can leverage new funding streams, and ultimately improve and increase services for income-qualified residents[2].

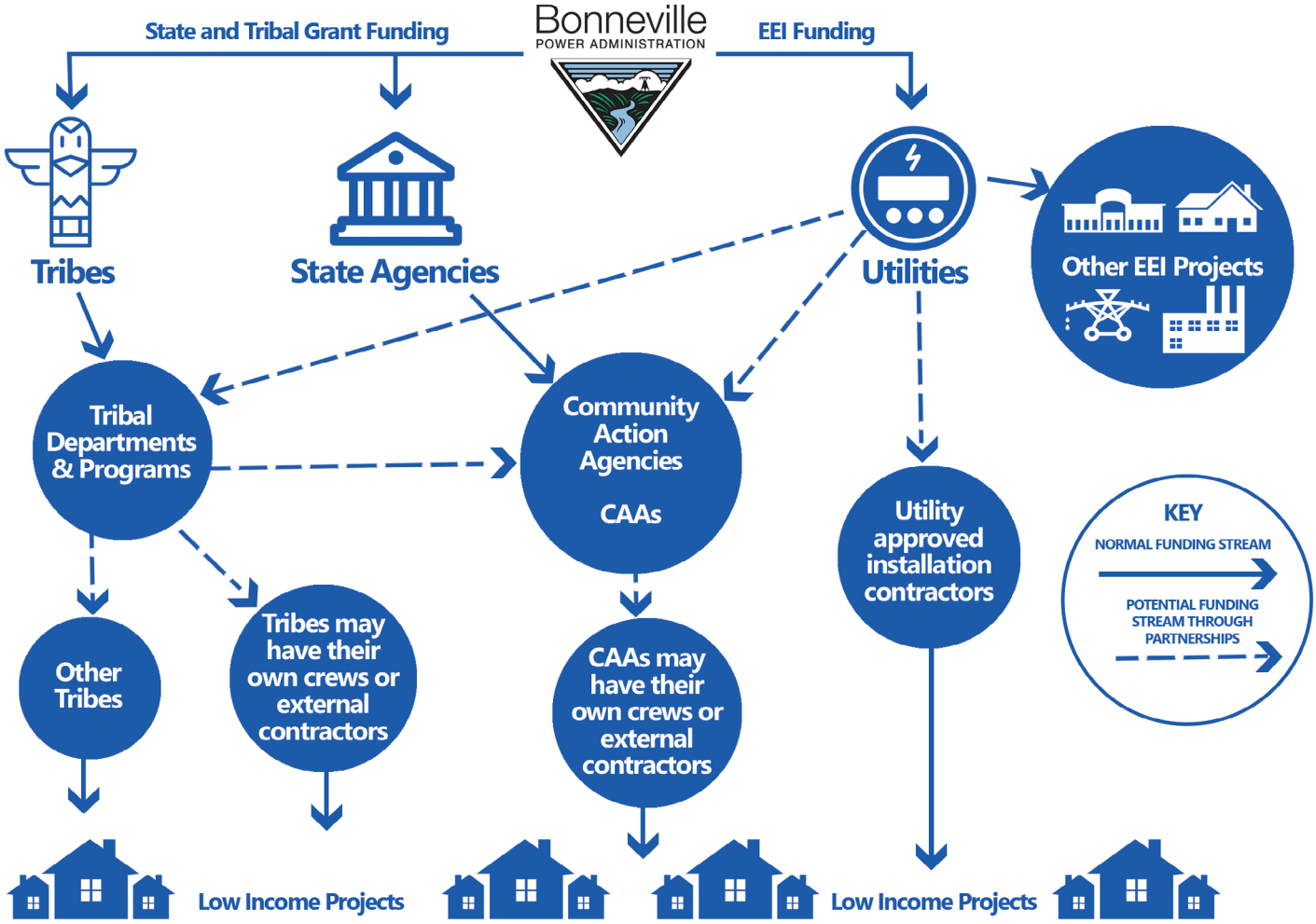
[1] https://www.nwcouncil.org/sites/default/files/eeonepager.pdf .
[2] A note on terminology: Increasingly, organizations are shifting away from the term "low income" when referring to a person, rather than a program, and toward using "income qualified," when referring to individuals who qualify for a program based on income. We have incorporated this

BPA'S LOW-INCOME ENERGY-EFFICIENCY PATHWAYS

To ensure energy efficiency is accessible to all ratepayers, BPA has two pathways for funding low-income energy efficiency. One is managed by public utilities through their EEI budgets, often supplemented by additional funding from the utility. Unlike other EEI-funded projects, or measures, the costs of most low-income energy-efficiency measures are reimbursed by BPA dollar-for-dollar to the utility, and do not require any payments from income qualified end-users.

BPA's other low-income energy-efficiency program is a grant program for states and tribes within BPA's service territory. Participating states contract with local CAAs to implement low-income energy-efficiency programs. Some tribes also choose to contract with CAAs, while others implement services themselves. Like the EEI-funded pathway, the grant program provides energy-efficiency services at no cost to the end-user.

With so many entities involved, there is a great deal of potential for partnership and collaboration on low-income energy-efficiency projects and programs. In any given home, implementing agencies often use multiple streams of funding — each with their own rules and requirements — to cover the measures needed to improve efficiency and comfort. Funding from both of BPA's low-income pathways can be used in the same home, as long as they are not used on the same measure. Read on to learn more about low-income energy-efficiency services, how to get started and how to partner with others to enhance your current energy-efficiency work.



Organizations involved in Bonneville Power Administration's Low-Income Energy-Efficiency Work

Low-income energy-efficiency services and programs can seem complicated at first, with a lot of different entities involved. It takes a diverse group of organizations working together across the region to provide accessible and impactful low-income energy-efficiency programs to the residents who need it most. This section will introduce the main groups involved in making BPA's low-income energy-efficiency programs happen.

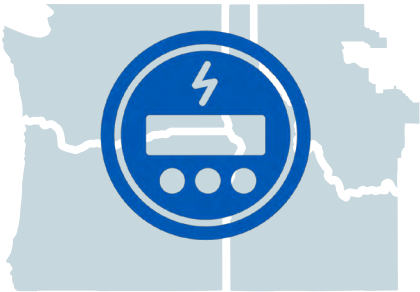
BONNEVILLE POWER ADMINISTRATION

BPA, headquartered in Portland, Oregon, is a nonprofit federal power marketer that sells wholesale electricity from 31 federal dams and one nuclear plant to Northwest electric utilities. BPA serves millions of residents and businesses in Idaho, Oregon, Washington, Western Montana, and parts of California, Nevada, Utah and Wyoming. BPA delivers power via more than 15,000 circuit miles of lines and 259 substations to 490 transmission customers. In all, BPA markets about one-third of the electricity consumed in the Northwest and operates three-quarters of the region's high-voltage transmission grid.

BPA also funds one of the largest fish and wildlife programs in the world, and with its partners, pursues cost-effective energy savings and operational solutions that help maintain affordable, reliable and carbon-free electric power for the region.

PUBLIC UTILITIES IN THE NORTHWEST

Public utilities have a long history in the Northwest and play a crucial role in the region's energy-efficiency efforts. As the name suggests, public utilities are nonprofits owned by their communities, with locally elected boards. Public utilities take various forms, including rural electric co-ops, public utility districts, peoples' utility districts and municipal electric utilities. There are approximately 135 public utilities in the Northwest, most of which receive electricity from BPA to meet their power needs. BPA provides power at cost to public utilities to ensure low-cost hydropower benefits the public, particularly residential and rural customers.



Each public utility that purchases power from BPA receives an EEI budget every two-year rate period that must be used by the end of the period. Many utilities use their EEI budget and additional utility budget to fund low-income energy efficiency. They also ensure funding is distributed across their community to projects, including work in the commercial, industrial and agriculture sectors. Public utilities may hire contractors to implement energy-efficiency projects and can also partner with CAAs to provide funding for the implementation of additional projects for low-income households in their service territory.

STATE AGENCIES

Idaho, Montana, Oregon, and Washington each have an agency at the state level responsible for coordinating energy assistance and weatherization programs for the state:

- Idaho Department of Health and Welfare
- Montana Department of Public Health and Human Services
- Oregon Housing and Community Services
- Washington Department of Commerce

Each agency provides a broad range of services to support income-qualified residents in achieving self-sufficiency. State agencies receive funding from a number of different sources to assist residents of their states with weatherization and other energy-assistance measures, including funding from the BPA Low-Income Energy-Efficiency Grant Program. Funding is then distributed to CAAs to implement low-income energy-assistance programs at the local level.

TRIBAL GOVERNMENTS

Federally recognized tribes are sovereign governments recognized by the United States Constitution. As sovereigns, tribal governments manage and implement federal programs. Tribes may leverage various funding sources to maximize their low-income energy-efficiency programs, and may choose to partner and collaborate with other federal programs, states, CAAs, tribes and utilities.

There are more than 50 federally recognized tribes with interests within the BPA service territory. Some of these tribes are served by BPA public utilities and are eligible to participate in the BPA Low-Income Energy-Efficiency Grant Program. Tribal utilities that receive power from BPA may also choose to dedicate some of their EEI funding to low-income programs.

COMMUNITY ACTION AGENCIES[3]

CAAs are nonprofit, private and public organizations established under the Economic Opportunity Act of 1964 to fight America's War on Poverty. CAAs help people to help themselves in achieving self-sufficiency by providing a wide range of services. Because CAAs are governed locally, each provides a different mix of programs and services such as food pantries, energy assistance, domestic-violence shelters, job readiness, day care, health clinics and rural transportation to meet the needs of its community. Today there are more than 1,000 CAAs serving the poor in every state, as well as Puerto Rico and the Trust Territories. CAA service areas cover 99% of the nation's counties. Individual agencies are connected through networks at the national, state and regional levels.

CAAs are a primary source of direct support for the more than 40 million people who live in poverty in the United States[4]. The majority of CAA program participants are extremely poor, with incomes below 75% of the federal poverty threshold — or $16,290 for a family of three —under the 2020 guidelines[5]. The average number of low-income people within each service area is 40,000.

More than half of CAAs have a weatherization assistance program. To date, CAAs have helped more than 2 million people obtain non-emergency energy assistance such as home heating or insulation. In 2019 alone, 116,000 units were weatherized, preserved or otherwise improved.[6]

[3]People familiar with the work of Community Action Agencies may have also heard the term CAP, or Community Action Program, to describe this type of organization. A CAP is a program within the Community Action Agency. For clarity and consistency in this document, we will use the term CAA unless referring to an entity that specifically refers to itself as a CAP.
[4]https://communityactionpartnership.com/our-impact/
[5]https://aspe.hhs.gov/poverty-guidelines
[6]https://communityactionpartnership.com/our-impact/

LOW INCOME ENERGY EFFICIENCY WORK GROUP

BPA, public utilities, CAAs and other interested parties formed the LIEE Workgroup in 2014. The workgroup's mission is to share information and develop best practices to increase low-income residents' access to and uptake of energy-efficiency services across the Northwest. Through the workgroup, BPA, CAAs, public utilities, tribes and other interested groups share their history and procedures with each other, enabling new possibilities for coordination, partnership and innovation.

The group continues to meet several times per year, with meetings broadcast via WebEx and telephone to make them accessible without travel. Facilitation is provided by BPA staff. All interested parties are invited, including utilities, low-income advocacy groups, CAAs, tribal governments, and state-level energy offices. The workgroup is led by a small, representative steering committee, which meets before and after each meeting.

The objectives of the work group are to:

- Provide a venue for utilities, advocates and other organizations to come together.
- Increase knowledge of CAA and utility business activities.
- Find simple solutions to streamlining reporting between organizations (CAAs, utilities).
- Identify barriers and solutions to increasing low-income access to energy-efficiency programs.

Learn more about the workgroup at: https://www.bpa.gov/EE/Policy/Pages/Low-Income-Efficiency.aspx.

Partnerships in Action: Community Action Team and Columbia River PUD

"The Community Action Team, or CAT, weatherization program and our clients have greatly benefited from the workgroup meetings that have been going on for the last year. We have a stronger understanding of the BPA program and how our agency can better partner with local PUDs. This has resulted in the largest allocation of PUD dollars our agency has ever received. CAT and our local PUD's now operate as a team to maximize the weatherization program and reach as many clients as possible with high quality, cost effective and comprehensive weatherization.

As we ramped up to deliver more weatherization services due to the increased funding, we realized that we had a capacity issue in regards to the availability of auditors who complete the work. Cyrus Collins, a highly skilled energy specialist who works for Columbia River PUD, was interested in completing the Quality Control Inspector certification, which is required for CAAs that use Department of Energy and BPA grant funding. CAT proposed to Columbia River PUD to use our training and technical assistance dollars to pay for Cyrus Collins' training and testing. In return, Collins would perform energy audits and inspections for any joint projects between CAT and Columbia River PUD. This has worked out remarkably well. Our capacity issues were resolved and a new, deeper understanding of our combined needs and limitations has been fostered."

– Casey Mitchell, weatherization manager for Community Action Team

Utilities and BPA's Energy-Efficiency Incentive Pathway

BACKGROUND: ENERGY EFFICIENCY AND THE NORTHWEST POWER ACT

The Pacific Northwest Electric Power Planning and Conservation Act of 1980 introduced conservation as an energy resource for the Pacific Northwest. For the first time, energy efficiency was quantified and viewed as a means of resource acquisition. The Northwest Power Act requires BPA to meet energy needs by pursuing all cost-effective conservation before acquiring other resources.

The Northwest Power Act also initiated the creation of the Northwest Power and Conservation Council, or Council. The Council was required to prepare plans to protect, mitigate and enhance fish and wildlife — while assuring the region an adequate, efficient, economical and reliable electric-power supply. Northwest Power Plans produced by the Council cover a 20-year period, and are updated every five years. Each Power Plan includes the Council's estimate of the amount of energy that can be saved through energy efficiency during that period. This quantity is used to set regional savings goals and benchmarks.

ENERGY EFFICIENCY AT BPA: PARTNERING WITH UTILITIES

Public utilities served by BPA represent about 40% of the electric-power load for the region. Historically, BPA has committed to achieving a similar proportion of the regional energy-efficiency target for each power plan. BPA meets this commitment by working with its electric utilities to acquire energy efficiency. Because the Northwest Power Act requires energy-savings achievements to be cost effective, the overall benefits of BPA's energy-efficiency portfolio must exceed its costs.

Utilities that purchase power through BPA enter into an Energy Conservation Agreement, or ECA, and receive an EEI allocation for each two-year rate period to use toward energy-efficiency projects. Each rate period, BPA publishes an Energy Efficiency Implementation Manual, or IM, which describes the types of energy-efficiency projects, or measures, which are eligible for reimbursement through EEI funds. The IM covers programmatic energy-efficiency savings that are reportable to BPA's targets, and includes implementation, documentation and reporting requirements for each measure described. Utilities determine which sectors, projects and measures best meet their utility needs and efficiency budget, and offer the selected measures to their customers.

LOW-INCOME ENERGY EFFICIENCY: MEASURES AND REIMBURSEMENT

Utilities can choose to dedicate a portion of their EEI funding to energy-efficiency projects for customers who make under a certain income level (see Eligibility, below). Unlike other measures listed in the IM, low-income measures are nearly fully reimbursed to utilities by BPA, with some caps and exceptions for measures that are at risk of no longer being cost effective. Costs eligible for reimbursement include those needed to meet requirements and specifications (e.g. verification of income, attic and crawl space ventilation, removal of knob-and-tube wiring, and underfloor moisture barriers). Utilities can also report costs related to repair work directly associated with the installation of a measure that is required for health and safety, or to ensure the effectiveness of the measure (e.g. replacing rotting wood in a window frame, or repairing a hole in the roof). It is important to note, however, that while BPA's reimbursement to utilities covers the full measure cost, it does not cover costs associated with auditing or inspecting the home, or processing required documentation.

Low-income weatherization measures include insulation, windows and patio doors, Low-E storm windows, exterior insulated doors, ductless and air source heat pumps, heat pump water heating, smart thermostats, Performance Tested Comfort System prescriptive duct sealing and whole house air sealing. Requirements, specifications and reimbursement rates for each measure can be found in the IM. Utilities may combine funding sources within a residence, but cannot use funding from the EEI low-income pathway and the Low-Income Grant Program to pay for the same measure.

ELIGIBILITY

Income qualifications follow the U.S. Department of Energy Weatherization Assistance Program definition of 200% of the federal poverty-income level based on household size, unless a statewide eligibility definition is provided. In the Northwest, state minimum income levels for participation are often higher than the federal level.

For the weatherization of entire multiunit buildings, at least 50% of the households must be income qualified. All existing housing types (Single-family, manufactured and multifamily) are eligible for low-income measures, although not all measures are applicable to each housing type.

2020 FEDERAL POVERTY INCOME LEVELS FOR THE 48 CONTIGUOUS STATES [7]		
# OF PEOPLE IN FAMILY/ HOUSEHOLD	FEDERAL POVERTY GUIDELINE	200% OF THE FEDERAL POVERTY GUIDELINE
For families/ households with more than 8 people, add $4,480 for each additional person		
1	$12,760	$25,520
2	$17,240	$34,480
3	$21,720	$43,440
4	$26,200	$52,400
5	$30,680	$61,360
6	$35,160	$70,320
7	$39,640	$79,280
8	$44,120	$88,240

[6] https://aspe.hhs.gov/poverty-guidelines. Please note that these guidelines are updated annually.

ADMINISTRATION AND DOCUMENTATION

Utilities that operate low-income weatherization programs may do so through an implementation firm or a CAA; however, they must retain responsibility for the program. Regardless of who operates the program, utilities must retain documentation such as the total number of individuals in each household and proof that the end-user's income eligibility was reviewed from a verifiable source, such as a paystub, or certification by a CAA. Detailed documentation and reporting requirements for utilities can be found in the IM. For an overview of reporting and documentation when a CAA administers low-income energy-efficiency work for the utility, see page 15.

Utilities interested in starting or growing a low income energy efficiency program should contact their Energy Efficiency Representative for more information.

BPA Low-Income Energy Efficiency State and Tribal Grant Program

The Low-Income Energy Efficiency State and Tribal Grant Program provides funding to deliver energy-efficiency services for income qualified households. The grants follow the Department of Energy Weatherization Assistance Program, or WAP, requirements almost exactly, making it easier for recipients to implement the program. Through partnerships with states and tribes, the program weatherizes homes, installs ductless heat pumps, replaces inefficient appliances with new appliances that meet ENERGY STAR® standards, and trains staff to implement the program using Department of Energy-approved weatherization training programs, among other projects.

PROGRAM BACKGROUND

The 1983 Power Plan outlined conservation requirements for the region, including language requiring that low income, rate-paying residents benefited from these programs. BPA created the Low-Income Weatherization Program in the mid-1980's to ensure income-qualified residents would have access to energy-efficiency services. Over time, the program expanded beyond weatherization to include a more diverse offering of energy-efficiency measures, and became the Low-Income Energy Efficiency Grant Program.

The Low-Income Energy-Efficiency Grant Program serves residents who live within BPA's service area. Originally, the entire grant budget was allocated to state agencies. In 1999, BPA updated its program to provide funding directly to interested tribes within the BPA service territory. By using the existing infrastructure within each state or tribe, the program is able to effectively identify and serve income-qualified residents.

As an agency within the Department of Energy, BPA chose to align its grant program and requirements with the WAP. BPA partners with states that implement approved WAP programs and provides additional funding within the BPA service territory. The Department of Energy requires all homes to be audited and inspected, and inspects 10% of homes through field monitoring. This results in BPA's grant recipients having well-established oversight, quality control and energy savings, without adding new administrative and reporting burdens for state and local implementing agencies.

FUNDING

BPA

The annual budget for the BPA Low-Income Energy-Efficiency Program changes each year, but is typically around $5.5 million-$6.0 million, and is set by the BPA Administrator through the Integrated Program Review process. Each year, 10% of the total is directly distributed to tribes residing in BPA's service territory. The remaining 90% is distributed to the state agency programs in Idaho, Montana, Oregon and Washington. Individual state budgets are based on the amount of income-qualified people residing in that state, as determined by the census. The Low-Income Energy-Efficiency Program budget is completely separate from the EEI budget designated to BPA's public utilities.

Budgets for individual participating tribes are based on applications submitted annually. Applications include information such as the amount of eligible participants in the tribe, how much funding the tribe receives from other sources, their level of weatherization-program experience, and any past success the tribe has had with their energy-efficiency program.

Funding is contractually obligated to states and tribes via grants and then invoiced to BPA as the work is completed. The tribal and state grants are almost identical, with a couple of exceptions.

STATE AND FEDERAL FUNDING

In addition to the BPA Grant Program, all four recipient states receive federal funding from the WAP and the Low-Income Housing Energy Assistance Program, or LIHEAP. Many of the tribes in the region also administer funding through one or both programs. The WAP covers conservation services, health and safety repairs, heating-system repair and replacement, energy-related minor home repairs, air-infiltration reduction, ceiling, wall and/or floor insulation, heating duct improvements, base-load measures and energy education to households.

LIHEAP is a block-grant program, which primarily funds heating- and cooling-cost assistance to income-qualified families, with a portion of funding also used for weatherization and other energy-efficiency measures. LIHEAP is a particularly flexible funding source and can be used on most energy-conservation measures. More information about WAP and LIHEAP and their requirements is available on their websites.

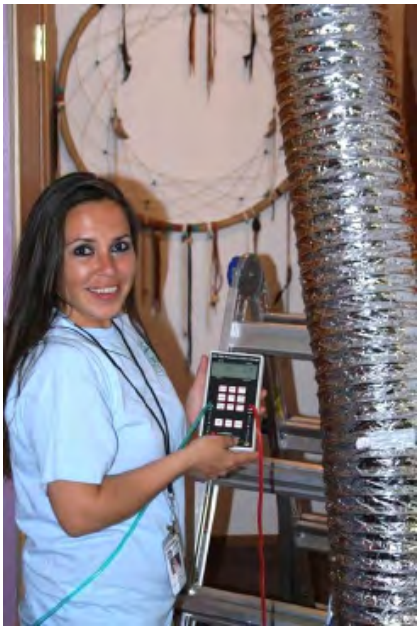
Along with BPA and federal energy-assistance funding, each state has an additional program to supplement their other funding sources:

IDAHO DEPARTMENT OF HEALTH AND WELFARE	MONTANA DEPARTMENT OF PUBLIC HEALTH AND HUMAN SERVICES
BPA EEI Pooling Group Partnership	Northwestern Energy Low-Income Weatherization and Fuel Switching
The budget for the EEI partnership program is determined by the Idaho Energy Authority pooling group. Funding allocations are determined based on the number of utilities within a service area and targeted needs in rural areas of Idaho to ensure smaller utility customers have access to this program.	A Universal System Benefits Charge collected from all electric and natural-gas distribution customers of Northwestern Energy funds the Program. The Program facilitates the investment of Universal System Benefits funds in the homes of income-qualified electric and natural-gas distribution customers of Northwestern Energy.
OREGON HOUSING AND COMMUNITY SERVICES	**WASHINGTON DEPARTMENT OF COMMERCE**
Energy Conservation helping Oregonians	Matchmakers Program
The law establishes an annual expenditure by Oregon investor-owned utilities of 3% of their revenues to fund "Public Purposes," including energy efficiency, development of new renewable energy and low-income weatherization.	The Matchmakers Program is a capital-funded leveraging program that maximizes available state capital funds with matching resources received from utilities, property owners, and other non-federal entities and sources to provide weatherization to low-income households.

Each state and federal funding stream covers slightly different energy efficiency measures, with different requirements and limitations. Each funding source also has different rules around health and safety expenditure limits, weatherization-related repair limits, and how soon after a previous weatherization homes are eligible to be re-weatherized.

[7]LIHEAP: https://liheappm.acf.hhs.gov/na;
WAP: https://www.energy.gov/eere/wap/weatherization-assistance-program

PROGRAM IMPLEMENTATION FOR STATES & TRIBES



STATE GRANTS

The state agencies in Idaho, Montana, Oregon and Washington that receive low-income energy-efficiency grant funding contract with local CAAs to implement low-income energy-efficiency programs. CAAs are typically assigned by county, and weave together multiple funding streams to optimize their funding and better serve income-qualified residents — matching each measure needed in any given home to the most appropriate funding source.

TRIBAL GRANTS

The Low-Income Energy-Efficiency Tribal Grant Program allows for a lot of flexibility in implementation, enabling each tribe to determine how best to provide services to their members. Tribes vary in how they administer the program, and may implement it through their housing department or authority, elder program, social services, grants department, or other departments or programs. Tribes can implement their project work in-house, or contract with CAAs or private vendors. Funding can be used for program development, training, community outreach and installations, among other possibilities.

Participating tribes attend one or two workshops per year to share best practices, participate in trainings and work together on a project. BPA's low-income energy-efficiency program manager is available to assist tribes in developing their programs and to connect them to others performing this type of work in their area.

GRANT REQUIREMENTS AND ELIGIBLE MEASURES

Every year, each state submits a Low-Income Weatherization Assistance Plan to the Department of Energy, describing how their WAP will work, including how the state will define low income and cost effectiveness, their process for audits and inspections, and a budget overview. Tribes may choose to follow the current Weatherization Assistance Plan of Idaho, Montana, Oregon or Washington, regardless of where they are located. BPA grants specify that tribes can also provide their own income-qualification definition. Many tribes choose to align with the state to more easily coordinate with CAAs in their area.

BPA grants generally require that recipients follow the current WAP requirements, and the definitions and program design laid out in the state's approved Weatherization Assistance Plan. However, the grants include a few exceptions and allowances designed to complement the Department of Energy's program and allow for more flexibility:

- BPA allows a higher percentage of the grant budget to be used on health and safety, and weatherization-related repairs.
- BPA allows energy-efficient lighting, microwaves, ENERGY STAR clothes washers and ductless heat pumps to be installed with minimal requirements.
- BPA does not have an age requirement for the dwelling.
- BPA does not have a limit on how many times work is performed in a home, nor a time-lapse requirement in between work conducted on a home.

Homes must be located in a public utility service territory served by BPA, and must be electrically heated to be weatherized. For the tribal grants, homes must be occupied by a member of a federally recognized tribe. States are required to spend no less than 3% of their BPA budgets on tribal residents.

CAAs and tribes may have in-house contractors, inspectors and auditors, or may work through third-party contractors. WAP guidelines require a certified auditor to visit each home before work starts to determine which measures should be installed. The auditor may use state-specific calculations of cost effectiveness based on the home's specific measurements, or may use Unit of Energy Savings, or UES, calculations, which are specified in the IM. Energy savings for UES measures have been estimated on a per-unit basis (e.g., savings per light bulb) when used in a similar baseline home, and are used to determine cost-effectiveness. An inspector must follow-up after all measures are installed.

The auditor and inspector must be U.S. Department of Energy-certified. Installers generally do not need U.S. Department of Energy certification or training, but states may specify additional requirements for inspectors, auditors or installers in their Department-approved Weatherization Assistance Plan.

Income requirements for the grant program are the same as those in the EEI program. Most states use the WAP default of 200% of the federal poverty level, which is differentiated by household size. However, states may specify alternate definitions of low income in their Weatherization Assistance Plan. Most states give priority to seniors — ages 60 years and older — people with disabilities, households with children under the age of six, high residential users, and households with a high energy burden (i.e. when 11.6% or more of household income is used to pay for energy costs). Washington also gives priority to Native American households.

States and tribes are required to provide quarterly and annual reports to BPA, including the number of homes served, appliances installed and some demographic information.

HOW TO GET STARTED	
Community Action Agencies	CAA's interested in beginning or developing their low income energy efficiency services can contact the agency in their state responsible for administering the state's low income energy efficiency funding (see Appendix D).
Federally Recognized Tribes	Tribes interested in applying for a grant can check out the application here: https://www.bpa.gov/EE/Policy/Documents/LIEE_Tribal_Grant_Application_FY2020_2021.pdf Applications are accepted on a rolling basis.

Energy Efficiency Partnerships: Tips for Getting Started

Many entities that perform low-income energy-efficiency work partner with each other to combine resources and maximize the impact of low-income energy services. Utilities, CAAs and tribes each have different strengths, specialties and resources available to provide energy-efficiency services to low-income residents in their areas.

Because CAAs use a variety of funding sources, they are often highly skilled at braiding together multiple funding sources — each with different rules, allowances and limitations — to meet the needs of their low-income clients. They also often have waiting lists of verified income-qualified clients who need weatherization or energy assistance. Tribal programs are well positioned to serve the members of their tribes, as they are familiar with the culture, strengths and needs of their communities, and may already have relationships with income-qualified residents interested in energy-efficiency assistance. Like CAAs, tribal programs are also skilled in working with many sources of funding. Publicly owned utilities, meanwhile, are members of their local communities. In addition to potential funding, utilities bring relationships with community members and contractors for low-income services.

To wholistically service communities, utilities, CAAs and tribes can work together and combine funding from the EEI and low-income energy-efficiency grant pathways, along with other federal, state and grant-funding sources. In addition to funding, partnerships can include agreements about who will provide installation, audits, inspections and contractor trainings, who will identify clients, how their income will be verified, and what records need to be kept and reported, among other possibilities.

STARTING A RELATIONSHIP WITH A COMMUNITY ACTION AGENCY, TRIBE OR UTILITY

While many entities performing low-income energy-efficiency work understand the benefits of partnership, it can be difficult to know where to start when exploring a possible relationship with other organizations in your area. The following sections provide an overview of how to reach out to a CAA, tribe or utility, and some useful things to know about each. To find a CAA, tribe or utility in your area, see Appendices B, C, and D. Keep in mind, all low-income energy-efficiency work performed using BPA funding must be located within BPA's service territory. Any partners using this funding must work with homes served by a BPA-served public utility (See Appendix B).

TIPS FOR PARTNERING WITH A UTILITY[9]

Utilities served by BPA may choose to spend a portion of their EEI funds on low-income energy-efficiency services. Those who do may implement their own low-income work or create agreements with other providers on projects in their service territory, and reimburse the implementer using their EEI funding and/or their own additional funding. For CAAs or tribes with existing energy-efficiency programs, this can be a great opportunity to leverage additional funding.

For CAAs or tribes interested in working with a utility they do not have an existing relationship with, reaching out to the utility's energy-efficiency staff is a great way to start. Most utilities have one or more individuals dedicated to implementing energy efficiency within their service territory. When you speak with the utility, sculpt your delivery around the areas where your low-income energy-efficiency program aligns and can facilitate the utility's particular interests

Tell them a bit about your organization, what it does and the services it provides for low-income residents in the utility's service territory. Focus in particular on the energy-assistance services you provide. Cover the entire list of services provided by

[9]Thank you to the members of the LIEE Workgroup for providing the recommendations in this section, based on their experiences with creating partnerships.

your program, including income qualification, energy assistance, heat-crisis and energy education, weatherization and other offers.

Present the goals of your program and the services you are best at providing, highlighting assets such as your waiting list, grants, staff, and the institutional knowledge, experience and networking you bring to the table. Organizations with less developed programs may want to talk about areas in which you would like to expand. Ask about the utility's general energy-efficiency goals and how they achieve them. It is good to give them the time to explain the breadth of their energy-efficiency program. Listen and take notes on how your program could help the utility and how their existing services could help yours.

Ask if they have a low-income EEI program. This is a good time for CAAs to explain that through the WAP-regulated application process, you have a wait list of certified low-income clients waiting to receive energy-efficiency services. Highlight and discuss the ways utility-program goals align with those of your organization. Discuss the strengths and weaknesses of each program, and seek out ways the overlap of the programs can strengthen the other.

Be careful of preconceived outcomes. You may go into a meeting and seemingly get nowhere with your goal of partnering on low-income weatherization. On the other hand, you may walk away with a new energy-efficient heating system for your Head Start or upgraded lighting for your foodbank warehouse. Keep in mind that utilities, just like CAAs, often have their annual energy-efficiency budget allocated before a program year begins. A partnership is a partnership; good partnerships are cultivated and grow over time.

REPORTING TO BPA: FOR PARTNERSHIPS THAT USE EEI FUNDS

When utilities partner with CAAs or tribal programs as implementers for EEI-funded low-income energy-efficiency work, the implementing agency, utility and BPA must each document and retain different information. The following table lists the typical responsibilities for each organization, although many organizations choose to collect and retain additional or alternate information. Requirements often change from year to year, so check the most recent copy of the IM for up-to-date information on documentation and reporting. Utilities may also contact their EER for more detailed information. Refer to pages 27-33 to view examples of documentation to be submitted to utilities and BPA.

Implementing Agency or Program

Submit to utility

Examples:

- Measure-funding worksheet.
- Invoices.
- Efficiency ratings of materials.
- Income and occupancy statement

Maintain on file

Examples:

- Invoices.
- Warranty information.
- Audit form.
- Income-verification documentation.
- Measure-funding worksheet (what was billed to each source).
- Inspection documentation.

Utility

Submit to BPA

- Upload template.
- Funding source.
- Measure ID.
- Number of units.
- Date.
- Site ID.
- Address.
- Measure and repair cost.
- Other measure- specific templates.

Maintain on file

- As required for specific measures, per the BPA IM Low-Income Weatherization section (Residential sector).

BPA

Via electronic reporting system

- Invoice is generated by the system.
- COTR reviews the invoice.
- COTR approval email is sent to utility.
- Payment is made on the 30th day from when invoice was received in the system.

TIPS FOR PARTNERING WITH A COMMUNITY ACTION AGENCY[10]

Before reaching out to a CAA, check in with your management, board members and/or council members to make sure they are on board with offering a low-income program. It is helpful to know your boundaries before holding meeting with the CAA, so you know what you can commit to.

Make an appointment with the energy-services manager at the CAA to introduce yourself and ask about their programs and goals. Briefly explain your programs and funding, and get a feel for a potential partnership. Find out what funding they have, whether they have the infrastructure in place to increase their funding, and how your funding can be incorporated to leverage their existing program.

If they like the idea of a partnership, take the time to dive deeper and explain what you need for documentation. For tribes reaching out to a CAA to discuss a partnership, this may be fairly straightforward, since tribal LIEE-grant requirements and state-level LIEE grants are nearly identical. There may be exceptions in what each state requires of the CAAs it contracts with, but otherwise, allowed measures, documentation and reporting of tribal and state-level LIEE grants are very similar.

Utilities looking to form a new partnership with a CAA will need to be prepared to bring more information about how EEI funding works, and what documentation and reporting is needed on file to provide incentives for all measures. For example:

- Explain that the CAA will need certified contractors for some measures to use EEI funding, and offer to help them get training if needed.
- Funds often require the use of a BPA-maintained qualified product lists.
- You may need to go into detail about R-value requirements.
- Find out if they perform their own audits or if they use a third-party contractor. Let them know if you can or need to provide the audits for them. If they provide auditors, review their audit reports and make sure they provide adequate details to clearly explain the measures.
- Discuss invoices, audit reports, total project costs, repair costs and any other documentation you may require. CAAs most likely keep the data on file. It can be helpful to provide them with the IM, qualified product lists, forms and BPA's website for reference.
- Make sure both parties understand that funding from BPA grants and BPA EEI cannot be used on the same individual measure, but can be used within the same project or home.

It's important to keep in mind how many funding sources CAAs are already juggling, each with its own set of requirements for monitoring, reporting and invoicing, and its own fiscal year. While that means that the CAA likely tracks many of the things you will need, anything you can do to help clarify the requirements for EEI funds will likely be appreciated.

CREATING AN AGREEMENT

If both organizations are interested in partnership, work on creating an agreement. Decide on a budget that works for your utility and the current rate period, and make sure it is included in the agreement. Discuss any restrictions or concerns you may have. For example, one utility included a note that the CAA is to let them know if they can't spend the money within six months of the close of the BPA rate period so that they can reallocate the funds, if needed. Work on creating a contract, which may include which measures the utility can and cannot fund (see the IM for more information on covered measures: www.bpa.gov/EE/Policy/IManual). Agree on a minimum meeting frequency to make sure everyone is on the same page, work out any issues that arise, and take advantage of any unexpected opportunities.

Note: there is a bit of a learning curve for all parties involved. Be patient and work out the details as you move forward.

[9]Thank you to the members of the LIEE Workgroup for providing the recommendations in this section, based on their experiences with creating partnerships in low-income energy efficiency.

REACHING OUT TO TRIBAL GOVERNMENTS

When inquiring about the possibility of a partnership with a tribal government, there are a few things to keep in mind. A good first step is to research the tribe, how its programs and leadership are organized, and whether it currently administers a low-income energy-efficiency program. This kind of information can often be found on the tribe's official website.

Most tribal residential low-income energy-efficiency programs are run by a tribal housing department or authority, elder program, social services, grants manager, or maintenance program. If it is not evident from the website who might run these programs, a tribal housing department or authority can be a great place to start. If they do not run a low-income energy-efficiency program, they can likely tell you whether another department does, or might be interested. Tribal utilities who get their power from BPA may also do low-income work with their EEI funding and may be interested in being part of the conversation.

There are a few different approaches to reaching out to a tribe. At the more formal end, you can write a letter to the tribal chairperson, and copy the program or technical staff. You can then follow up with the program staff with a call or email. On the less formal end, call or email the program staff to determine whether there is interest in the program, and whether they or another tribal program office would like to learn more about low-income energy-efficiency possibilities.

Regardless of which approach you take, it is good practice to communicate early and often. Start reaching out long before you hope to work together and stay in touch. When requesting or scheduling a meeting or event you want to invite tribal program staff to, be mindful about of any upcoming tribal cultural events or holidays. These events are often (but not always) posted on the tribe's website. Like any new partnership, meeting in person is preferable, if possible. Learn about the goals of the department, and their goals for low-income energy-efficiency services. Look for and discuss areas of mutual interest. Be sure to verify that potential program participants receive electricity from a BPA public utility.

Partnerships in Action: Housing and Community Services Agency of Lane County, and Eugene Water & Electric Board

The Springfield/Eugene region is Oregon's largest recipient of BPA grant and incentive funds. When Steve Jole moved into the role of managing the weatherization program for Housing and Community Services Agency of Lane County, or HACSA, he knew he would have to build relationships with the utility boards to grow the program.

"I knew that I had to get the EEI partnerships back online. The most important factor is listening and figuring out where the needs of both community action and utility programs overlap. We have contracts with four BPA utilities. New this year, we have three of Lane County's COUs paying for the heating equipment (ductless heat pumps) for our heat-crisis clients. It is a huge boon for that emergency program. Any funds from the EEI help the overall program. The best scenarios are for the COUs to cover the cost of measures CAPs have trouble paying for with their other grants funds. Mobile-home roof caps and crisis heating systems are great examples."

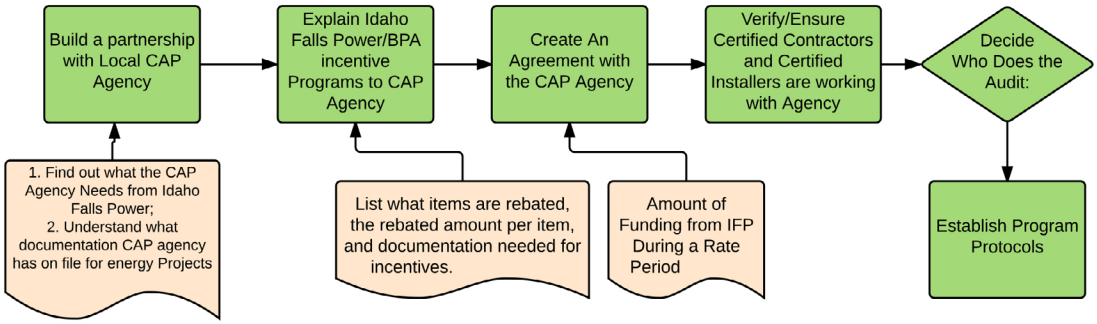
– Steve Jole, weatherization manager for Housing and Community Services Agency of Lane County

Case Studies and Sample Materials

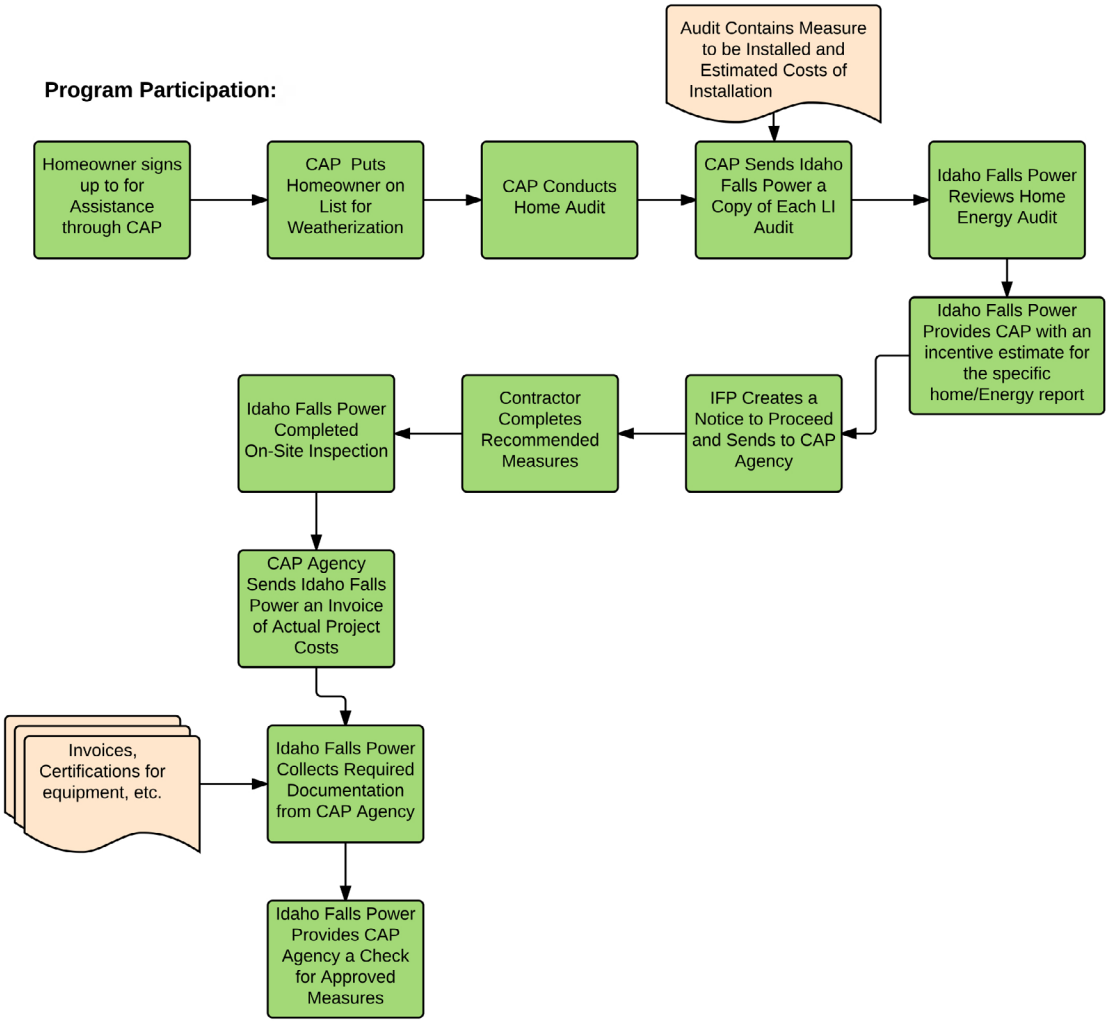
The following examples provide real-world case studies, processes and materials that demonstrate how low-income energy efficiency happens in the region from an implementer's perspective. Thank you to the Low-Income Energy Efficiency Workgroup for compiling and sharing their stories and experiences.

IDAHO FALLS POWER LOW-INCOME PROGRAM PARTNERSHIP PROCESS

Creating a Partnership:



Program Participation:



TACOMA POWER'S LOW INCOME PROGRAM CASE STUDY

About Tacoma Power

Tacoma Power is a municipal electric utility providing service to the City of Tacoma, several nearby cities, and unincorporated Pierce County. Tacoma Power has approximately 154,000 residential customers (~55% within Tacoma city limits) and 18,000 commercial/industrial customers.

Despite running a robust weatherization program since the 1980s, Tacoma Power has a significant weatherization need:

- 40% of the homes are electrically heated.
- 62% of homes were built before 1980.
- Estimate 10,000 homes needing weatherization.

Tacoma Power's service territory has a large number of low-income customers.

- 34% have a household income below $35,000 per year.
- Median household income is ~$15,000 lower than the surrounding Seattle-Bellevue-Tacoma metro area.
- ~5,600 customers currently receive a 30% rate discount

Tacoma Power's Low-Income Philosophy

Meeting the needs of low-income customers is a priority of Tacoma Power's Public Utility Board.

- Conservation must be distributed equitably among customer rate groups. Conservation programs are funded through power rates. Because all customers pay rates, it is important all customers have access to energy conservation programs.
- Conservation enables customers to pay bills on-time. Low-income customers pay a significant share of household budget to heat older, poorly insulated homes. Energy conservation helps customers to lower their utility bills, which in turn improves the likelihood of on time payment.
- Conservation represents a positive contact between us and our customers. For many customers contact with their utility is a negative experience — billing error, late payment, or power outage. Conservation is a unique opportunity to have positive contact with customers.

How Tacoma Power's Low-Income Program Works

Tacoma Power offers energy conservation grants to qualifying low-income customers.

- Grants cover the entire cost of duct sealing, ductless heat pumps, insulation and windows.
- Home occupants are qualified, allowing us to serve low-income renters.
- Grants are subject to cost caps.

YEAR	SINGLE FAMILY PROJECTS	MULTIFAMILY PROJECTS	DHP	TOTAL SPENT
2011	305	30	0	$2,064,000
2012	272	56	114	$3,263,900
2013	347	38	200	$3,412,500
2014	209	13	248	$2,121,300
2015	135	135	236	$2,065,800

To maximize participation and keep costs low, the low-income program dovetails with Tacoma Power's standard weatherization and ductless heat pump programs.

1. Customer contacts Tacoma Power and is directed to our Efficiency Ally list.
   a. Customers are encouraged to get multiple bids.
   b. In some cases Efficiency Allies recruit customers directly.
2. Customer signs contract and assigns their incentive payment to the Efficiency Ally.
3. Efficiency Ally collects low-income documents from customers and submits project information.
4. Tacoma Power certifies customers.
   a. Customers with projects that meet income qualifications are issued a notice to proceed.
   b. Customers failing to meet income qualifications are referred to our loan program.
5. Efficiency Ally completes project.
6. Tacoma Power inspects/approves project and pays Efficiency Ally.
   a. Efficiency Ally collects any difference from customer.

COWLITZ PUD AND LOWER COLUMBIA COMMUNITY ACTION AGENCY CASE STUDY: A LOW-INCOME WEATHERIZATION PARTNERSHIP

The Lower Columbia Community Action Agency, or LCCAA, located in Longview, Washington, has been in a partnership with its public utility, Cowlitz PUD, since 1982. In 2011, The Energy Project — which represents the CAAs throughout Washington state — initiated a strategic-planning meeting with the LCCAA executive director. The focus of the meeting was to determine local agency goals and discuss the possibility of expanding the LCCAA low-income weatherization program by leveraging BPA energy-efficiency funding allocated to Cowlitz PUD.

Soon after, the LCCAA approached the management of Cowlitz PUD to explore new partnership opportunities. They created an initial informal arrangement to work together, and LCCAA and the Cowlitz PUD slowly moved forward using some BPA EEI funds for residential energy audits. Cowlitz PUD wanted to assess whether the LCCAA could successfully spend funds that met the BPA energy-efficiency criteria for weatherization. Over the past few years, the partnership has blossomed and is quite successful.

LCCAA now has multiple funding sources it uses to coordinate low-income weatherization retrofits. It administers the federal LIHEAP weatherization dollars, the U.S. Department of Energy Weatherization Assistance Program funds, the Washington state-funded Energy Matchmaker Program, the BPA Low-Income Grant Program via the Washington Department of Commerce, and the BPA EEI funds via Cowlitz PUD. In the 2013-2015 funding cycle of the Washington State Energy Matchmaker Program, $563,265 was sponsored by Cowlitz PUD using BPA energy-efficiency funds. Since the inception of the partnership, there has been a change of Cowlitz PUD personnel, including the general manager and the conservation program manager; However, the program and relationships remain solid.

LCCAA provides a home energy audit, oversees subcontractors for the weatherization work, and performs an inspection. LCCAA pays the contractors and then bills Cowlitz PUD for the eligible and allowable work and fees that meet the requirements of Cowlitz's EEI contract with BPA. Depending on the measure, special needs of the home, and available and allowable funding sources, LCCAA administers, tracks and applies the funds necessary to meet the audit goals.

Cowlitz PUD approached LCCAA in late 2014 and early 2015 to identify other opportunities to leverage EEI dollars, proposing that they use funding for ductless heat pumps, which would benefit the majority of the housing stock. Other opportunities included improved communication between organizations and various local stakeholders, and community efforts that may provide economic development opportunities. Future opportunities that Cowlitz PUD observed included an improved energy-education component for clients and customers, better coordinated and strategic efforts around the evaluation of the building stock, and the hope to improve the efficiency of the processes.

Case study by Shawn Collins, Director of The Energy Project

Personnel interviewed for this case study:

Ilona Kerby, executive director, Lower Columbia Community Action Agency

Deanna Dahlberg, Lower Columbia Community Action Agency Weatherization Program/Fiscal staff

David I. Shepherd-Gaw, PMP, energy efficiency manager, Cowlitz PUD Energy Efficiency Services

LOW INCOME WEATHERIZATION PROGRAM AGREEMENT

Contract No. OS508

LOW-INCOME CONSERVATION AND ENERGY-EFFICIENCY PROGRAM AGREEMENT

THIS LOW INCOME CONSERVATION AND ENERGY-EFFICIENCY PROGRAM AGREEMENT ("Agreement"), is entered into by and between Public Utility District No. 1 of Cowlitz County, Washington ("District"), and Lower Columbia Community Action Program ("Agency"). The District and Agency may be collectively referred to as "parties", and individually as "party".

WHEREAS, the District is a municipal corporation organized and existing under Title 54 of the Revised Code of Washington and provides electric utility services; and

WHEREAS, the Agency is a private, non-profit corporation conducting its charitable activities in Cowlitz County, Washington; and

WHEREAS, the parties each operate parallel low-income conservation and energy-efficiency programs with slightly different standards to serve a common customer population in the community; and

WHEREAS, given the current economic conditions, the parties recognize the need to leverage their available funds and collaborate in order to meet the increasing demand for these services by integrating program activities to increase efficiency and reduce duplication.

NOW THEREFORE, the parties agree as follows:

1. **Agency's Duties.** Agency agrees to provide low-income conservation and energy-efficiency measures to eligible households receiving electric heating service from the District. Agency agrees to follow the specific terms, conditions and requirements of the various programs outlined in the Conservation and Energy Efficiency Program Summary, attached as Exhibit A and incorporated by this reference. Agency may continue its Weatherization program in addition to its participation and collaboration with the District as provided in this Agreement.

   Agency agrees to act as the lead coordinating organization for all related low-income work and will perform the following activities:

   A. Verify the eligibility of interested Cowlitz County residents for the District's low-income program by certifying that the household income is less than or equal to 200% of Federal Poverty Guidelines.

   B. Notify the District of residents' eligibility.

C. Schedule all and conduct necessary audits of residences being considered for weatherization.

D. Manage weatherization work and other agreed upon measures, excluding window installation. This includes:

1. Issue all work orders and/or purchase authorization orders to applicable contractors for approved projects.
2. Schedule and oversee work conducted.

E. Upon completion of work, schedule all necessary inspections including those required by District staff.

F. Submit, in a format acceptable to the District the following documentation for each project:

1. Resident's name and address
2. Date work was completed
3. Contractor(s) that performed the work
4. Measures implemented
5. Project and/or measure costs
6. Results of final inspection

G. Agency shall provide, upon request of the District, historical reports on the Agency's low-income projects for the purpose of assuring there is no duplication of funding through the parties' separate low-income programs.

2. **District's Duties.** The District will perform the following activities:

A. Provide to the Agency a list of all eligible conservation and energy-efficiency measures and corresponding rebates/incentives.

B. Provide to the Agency all necessary or required forms for proper documentation of work.

C. Compensate Agency for work performed after final inspections are completed.

3. **Compensation.**

A. For the customer-verification work described in Section 1.A., Agency shall invoice District $30.00 for each project completed at a single-family residence through the District's program. For a multi-family building, if the building qualifies for the low income program, rate shall be $30.00 for any living unit with a low income resident. Each January, the District will submit to the Agency a list of projects completed the previous calendar year through the District's program. Customer-verification fee will be limited to one per qualifying residence or living unit.

B. Upon completion of any project, Agency shall submit to the District an invoice, including information identified in Section 1.F. above. The District shall remit payment to Agency within 30 days of receipt of invoice.

Periods of performance under this Agreement are as follows:

- October 1, 2017 – September 30, 2018
- October 1, 2018 – September 30, 2019

The total value of each performance period shall not exceed $300,000, will be at the discretion of the District, and dependent upon many factors, including BPA EEI allocated dollars available, other District customer preferences, and changes to state/regional and/or federal codes, standards and laws that may negatively affect conservation and/or energy-efficiency measures, their cost-effectiveness or the implementation thereof. The value is subject to change at any time.

C. Agency may invoice the District for work performed creating historical reports, identified in Section 1.G. at a rate of $15 per hour.

4. **Personnel.** Agency shall furnish all personnel necessary to perform the services contemplated herein.

5. **Instructions and Approvals.** District shall appoint its representative who shall provide to Agency necessary information and approvals during the course of services provided hereunder. Agency may reasonably rely upon the accuracy, timeliness and completeness of the information provided by the District, at Agency's request.

6. **Oversight & Verification.** The District and/or the Bonneville Power Administration may perform inspections of all records, reports, and physical installations of the measures covered by this Agreement.

7. **Indemnification.** Each party agrees to defend, indemnify, and hold the other party, its agents and employees harmless, from any and all claims, demands, losses and liabilities to or by third parties arising from, resulting from or connected with services performed under this Agreement by either party or its agents, subcontractors or employees to the fullest extent permitted by law and subject to the limitations provided below.

   The parties' duty to indemnify the other party shall not apply to liability for damages arising out of bodily injury to persons or damage to property caused by or resulting from the sole negligence of the other party.

   Agency's duty to indemnify the District for liability for damages arising out of bodily injury to persons or damage to property caused by or resulting from the concurrent negligence of (a) District or District agents or employees and (b) Agency or Agency's subcontractors, agents or employees, shall apply only to the extent of negligence of Agency, Agency's subcontractors, agents or employees.

   The Agency specifically and expressly waives any immunity that may be granted it under the Washington State Industrial Insurance Act, Title 51 RCW. Further, the indemnification obligation under this Agreement shall not be limited in any way by any limitation on the amount or type of damages, compensation or benefits payable to or for any third party under workers' compensation act, disability acts or other employee benefits acts; provided the Agency's waiver of immunity by the provisions of this paragraph does not include or extend to any claims by the Agency's employees directly against the Agency.

The Agency's duty to defend, indemnify and hold the District harmless shall include, as to all claims, demands, losses and liability to which it applies, the District's personnel related costs, reasonable attorneys' fees, court costs and all other claim related expenses.

8. **Insurance Requirements.** The Agency shall secure and maintain during the life of the Contract such General Liability (CGL) insurance, if necessary, commercial umbrella insurance, which shall protect the District, its directors, officers, employees, and agents from claim which may arise from operations under this Contract, whether such operations are by itself, by any subcontractor, or by anyone directly or indirectly employed by either of them. The Agency shall provide a Certificate of Insurance designating the District as additionally insured and showing liability limits not less than the following amounts:

   A. Commercial General Liability Insurance:

      Commercial General Liability insurance, the limits of liability shall not be less than:
      - *$1,000,000 Each Occurrence (combined single limit for bodily injury and property damage)*
      - *$1,000,000 Personal and Advertising Injury Liability*
      - *$1,000,000 Products-Completed Operations Aggregate*
      - *$1,000,000 General Aggregate*

   B. Additional Insured Provision: The District, its officers, directors, employees and agents shall be named as Additional Insured on all general liability, excess, umbrella and property insurance policies, per Additional Insured Endorsement CG 20 10 11 85 or equivalent. The policy shall stipulate that the insurance afforded the Additional Insured shall apply as primary and non-contributory to any other insurance carried by the District, its officers, directors, employees and agents. The policy must provide coverage for completed operations. Endorsements or underlying policy language limiting coverage to "ongoing operations" are not acceptable. Exclusions of contractual liability as to bodily injuries, personal injuries and property damage MUST BE ELIMINATED from the basic policy and endorsements.

   C. Waiver of Subrogation Provision: All insurance policies of the Agency shall include a waiver of subrogation against the District, its officers, directors, employees and agents.

9. **Notices.** Any notice or other communication under this Agreement given by either party shall be sent by email, mail, or otherwise delivered to the addresses specified below. Either party may from time to time change such address by giving the other party notice of such change.

Agency	District
Deanna Dahlberg	Colleen Neel
Lower Columbia CAP	Cowlitz PUD
526 Commerce Avenue	961 12th Avenue/P.O. Box 3007
Longview, WA 98632	Longview, WA 98632
360-425-3430 (x-264)	360-501-9560
deannad@lowercolumbiacap.org	cneel@cowlitzpud.org

10. **Term & Termination.** This Agreement shall be in effect from October 1, 2017 through September 30, 2019. At periodic intervals an evaluation of the results of the Program shall take place and parties will make appropriate changes as needed. This agreement may be extended for an additional two year period, at the discretion of the District.

    This Agreement may be terminated by either party upon forty-five (45) days written notice to the other party. In the event of such termination, all projects in progress at the time of termination must be completed.

11. **No Third-Party Beneficiaries.** Nothing in this Agreement shall be interpreted or construed as granting any rights or benefits to anyone other than the Agency and the District.

12. **Confidentiality.** Subject only to such valid legal requirements for disclosure of information as may exist under law, Agency shall hold confidential all information provided by the District to the Agency. This provision shall survive the termination of this Agreement. Information which is presently in the public domain and information which comes into the public domain subsequent to the start of this Agreement through no fault of either party shall be excluded from this Confidentiality section.

13. **Governing Law and Severability.** This Agreement shall be governed by Washington law. If any term, condition or provision of this Agreement or the application thereof to any circumstance is determined to be invalid or unenforceable to any extent, the remaining provisions of this Agreement shall not be affected but shall instead remain valid and fully enforceable. This Agreement incorporates and supersedes all prior negotiations, agreements, and representations, whether verbal or written.

14. **Dispute Resolution.** The parties hereto agree in the event of a dispute they will meet and confer in good faith within 10 days of the date of the dispute to reach a reasonable resolution. If a resolution is not reached, the parties agree to refer their dispute to non-binding arbitration, the terms and conditions of such to be agreed on in writing or, in the absence of agreement on terms and conditions, to refer the matter to the American Arbitration Association office in Seattle under the rules for commercial arbitration. The parties may agree in writing to make any arbitration binding.

15. **Supersedure.** In the event that any provision of an exhibit to this Agreement is in conflict with this Agreement, the provisions of this Agreement shall supersede.

[Signatures on following page.]

BY SIGNING BELOW, the parties acknowledge agreement with the provisions herein.

LOWER COLUMBIA COMMUNITY ACTION PROGRAM	**PUBLIC UTILITY DISTRICT NO. 1 OF COWLITZ COUNTY, WASHINGTON**
Authorized Signature	Authorized Signature
Ilona Kerby	**Steven D. Kern**
Printed Name	Printed Name
Executive Director	**General Manager**
Title	Title
Date	Date

Attachment:

Exhibit A – Conservation and Energy Efficiency Program Summary

SAMPLE DOCUMENTATION FOR INVOICE PACKETS SUBMITTED TO FUNDERS

The following pages show examples of documents to be submitted to utilities and/or to BPA. Check the IM for up-to-date information on required documentation for each measure type.

MEASURE FUNDING WORKSHEET

JOB# 3456 NAME Sample AUD JD 1950 YR BUILT

MNO	SIR	AMNT	FUND	MEASURE	CONTRACTOR	Issue Date	To Finance
2	3.1	$388.00	066	Attic Insulation	Lowes		
7	1.0	$35.00	065	Door Sweep	Lowes		
7	1.0	$80.00	065	Door Weatherstrip	Lowes		
8	0.9	$875.00	066	Window labor	Lowes		
8	0.9	$462.80	066	Window materials	Cascade		
10	H&S	$2,345.70	065	Elec panel replacement	Oregon Electric		
10	H&S	$300.00	065	Lead Safe for windows	Lowes		
11	H&S	$609.05	265	Ashrae fan	Oregon Electric		
11	H&S	$80.00	065	Repair electrical short	Oregon Electric		
16	0.6	$2,900.00	066	DHP install	Associated Heating		

064	DOE Grant	$0.00
065	LIHEAP Grant	$2,840.70
066	Utility 66	$4,625.80
067	000	$0.00
068	000	$0.00
072	000	$0.00
073	000	$0.00
074	NWN	$0.00
078	SHOW	$0.00
080	000	$0.00
083	ECHO / PP	$0.00
265	BPA Grant	$609.05
$8,075.55	<< TOTALS SHOULD MATCH >>	$8,075.55

1	Roof Cap
2	Ceiling Insulation
3	Floor Insulation
4	Wall Insulation
5	Duct Insulation
6	Duct Sealing
7	Air Infiltration
8	Windows
9	Door Repl
10	H&S - Other
11	H&S-ASHRAE
12	Incidental Repair
13	Client Edu
14	Baseload
15	Furnace Rep 1.0+
16	Furnace Replace
17	Furnace Repair
18	Other

CONTRACT #
12-S #1 NW MH Service
12-S ARRTT's
12-S Associated Heat
12-S Cloudcap
12-S Dean Shultz
12-M Emerald d & G
12-R Emerald Valley Wx
12-S Gerard Electric
12-S Home Comfort
12-S Hull Home Eff.
13-R Lowes Wx
12-S Oregon Electric
12-S Premium - Ducts
12-S Premium - Air
12-S Sears Appliances
13-R Emerald Valley Wx
13-R #1 NW Roofing
13-R Cascade Windows

NOTES:

Community Action Organization
Energy Conservation
1001 SW Baseline St
Hillsboro, OR 97123

INVOICE

INVOICE	
[redacted]	
Invoice Date	Page
8/30/2019	1 of 1

Order/ purchase date

PERFORMANCE
INSULATION + ENERGY SERVICES

Invoice references:

Site address [redacted]

Type

Line Item			Description		Extended Price
2		1	AIR INFILTRATION REDUCTION		129.78
1157		25	R-19 BLOWN-IN FIBERGLASS (R-49FINISHED)		1214.85
1		118	BATH FAN VENTING		81.11
1		122	ROOF VENT FOR BATH FAN		54.07
957		64	ADD R-11 UNFACED FIBERGLASS BATTS		1,330.23
200		66	R-30 FACED FIBERGLASS BATTS-AT VOIDS		322
1		70	CUT IN FLAT FLOOR ACCESS(OPERABLE)		162.23
1157		62	INSTALL NEW GROUND COVER		370.24
100		63	WATER PIPE INSULATION		129.00
1		81	DUCT SEAL ENTIRE SYSTEM		648.95
2		1	SHORTEN OR REPLACE FLEXT DUCT RUNS IN CS		129.78
58		82	R-11 VINYL FACE BATTS ON DUCTS		112.52
12		83	R-19 VINYL FAED BATTS ON ATTIC DUCTS		27.96
1157		71	FLOOR WITH DUCTS EXTRA LABOR		185.12
1		139	JAMB UP/WEATHERSTRIP KIT		59.48
1		140	FURNISH AND INSTAL DOOR SWEEP		86.52

Quantities

Floor Insulation
Measure 1 cost
Measure 2 cost

Can be reported as a repair cost in one of the measures.

APPROVED
9-10-19
[redacted]

SUB-TOTAL: 5,043.84
TAX:
AMOUNT DUE: 5,043.84

SEP 0 9 2019

INCOME AND OCCUPANCY STATEMENT

Lower Columbia CAP

Lower Columbia CAP strengthens SW Washington communities by helping people out of poverty with access to food, housing, job training, and support services

1526 Commerce Avenue • Longview, Washington 98632 • telephone 360-425-3430 • toll free 800-383-2101 • www.LowerColumbiaCAP.org

June 16, 2020

This client has applied for the low-income weatherization program and was determined eligible on July 24, 2019:

Name:
Address:
City, State:
Phone:
Household Occupants: 1
% Poverty Guidelines: 90%
Verifiable Source Document: SS Award Letter for 2019 income

If you have any questions about this referral, please call me at extension

Thank you,

WEATHERIZATION FIELD AUDIT FORM

FOUNDATION WALL

#	Description/Type/R	Length (L.F.)	Height	Below Grade	Above Grade	Location	
1.	Ext Concrete RO	126	32 ft	2 ft	8 ft	Enc CS/Amb	
2.	Garage Concrete RO	22	2 ft	2 ft	2 ft	Enc CS/Garage	
3.							
4.							

Comments

SLAB FLOOR

#	Description/Type/R	Area (sq. ft)	Depth (below grade)	Perimeter (L.F.)	Exposed Perimeter (L.F.)
1.					
2.					
3.					

FRAME FLOOR

#	Description/Type/R	Area (sq. ft)	Location	Joist Spacing	Cavity Depth
1.	Post & Beam R-7	957	Cond/Enc CS	48	8
2.	Post & Beam R-0	200	Cond/Enc CS	48	8
3.					

Foundation Vents: Existing (NFA) Required (NFA) Ratio 1/ Add (NFA): 0.00

Vents: Vents to add:

of Vents to Replace? 0 Re-screen? 0

Ground Cover?	Need	Standing Water? No	
Pipe Insulation?	Need	Insulate Pipes (lineal ft.): 100	Extend Dryer Vent to Outside? NO

Comments

RIM AND BAND JOIST

#	Description/Type/R	Area (sq. ft)	Cavity Ins	Joist Height	Location	
1.						
2.						

Comments

Page 2

wx audit.xlsx

COMMUNITY ACTION

WEATHERIZATION FIELD AUDIT FORM

RECOMMENDATIONS

(Summarize all measures and recommendations)

Item:	
1	MECHANICAL EQUIPMENT: Heat Pump
2	Floor: Add R19 to existing insulation and insulate uninsulated areas to R30
3	Ducts: Seal Ducts
4	Ceiling: Bring all attic areas to R49
5	Infiltration: Reduce Air Leaks
6	Ducts: Insulate uninsulated plenums and supply boots in attic, crawlspace and garage
7	ASHRAE: Install ASHRAE Fan

Pre-R values are indicated on an additional page. This description or the insulation types listed on the contractor invoice can confirm the post-R values.

Prepared by 7/10/2019 Page 1

WEATHERIZATION FIELD AUDIT FORM

Client		Area of Conditioned Space	1157
Address		Volume of Conditioned Space:	9256
City		Number of Bedrooms	3
Phone		Number of Occupant	4
Owner		Housing Type	Single Family detached
LL Name		Level Type (Apts only)	
Auditer		# Floors on or Above Grade	1
Date	7/8/2019	Crawl Space Type	Enc CS
Yr Built	1979	Primary Heat Source	Elect

SPACE HEATING

Type	Electric Furnace		
Brand	Wesco	Age,yrs:	40
Model #	B-654794	Fuel:	Elect
Input cap(Btu/hr)	50	Output:	
APUE-COP-HSPF	0.99		
Location	Garage		
Thermostat -	Electronic		
Comments:			

SPACE COOLING / HEAT PUMP

Type			
Brand		Age,yrs:	
Model #		Fuel:	
Input Capacity			
Performance Adjustment (%)			
Location			
Thermostat -			
Comments:	No cooling		

WATER HEATER

Location	Garage	size	50
Brand	US Craftsmaster	Age,yrs:	
Model #	EHPS0RD045	Fuel:	elect
Input (Btu/hr)	27	H2O Temp	120
Energy Factor	0.88		
Comments:			

Page 1

BPA INVOICE OVERSIGHT FILE REVIEW; REQUIRED BACKUP DOCUMENTATION PER THE IM

These documents are required per the Implementation Manual for BPA's Low Income Programs to be kept in the utility customer file.

COTR IS2 INVOICE AND OVERSIGHT FILE REVIEWS

	REQUIRED FOR ALL MEASURES					REQUIRED FOR SOME MEASURES Consult IM for specific measure requirements. Most equipment requires unique IDs and address information. Residential exceptions include CFLs, showerheads, appliances, pipe insulation, and thermostats. Non-residential/multi-sector exceptions include traffic signals, exit signs, appliances, kitchen equipment, network power management, power strips, showerheads, water heaters and ag stock tanks.						LOW-INCOME WEATHERIZATION MEASURES (if claiming dollar-for-dollar reimbursement)		RE
	FUNDING SOURCE	REFERENCE NUMBER	QUANTITY	COMPLETION DATE	FEDERAL FACILITY	UNIQUE SITE ID	SITE NAME	STREET	CITY	STATE	ZIP	LOW INCOME MEASURE COSTS	LOW INCOME REPAIR COSTS	
	Indicates which type of funds paid for the referenced measure. (Dropdown box below)	Reference number for the corresponding measure.	Number of units claimed using the unit definition in the Implementation Manual.	Date when measure (or group of measures) was installed and all requirements were achieved. (mm/dd/yyyy)	Was measure installed in a federal facility? (Dropdown box below)	Utility assigned end user account or member number. Maximum length 50 characters.	Descriptive name of end user (i.e., Safeway) where measure was installed. Never collected for residential measures; do not include personally	Physical address where the measure was installed. (Dropdown box below for State). Zip field allows for zip+4 format.				Project cost of the the low-income measure.	Cost of repair work performed to ensure the efficacy of installed measure.	PTCS accept codes. spac
5	EEI	BWBHD11080	1.00	04/02/2012	NO	5546546546594	Example with all cols	Test Street 1	Test	ID	55555	151	101	
6	EEI	LHVEN10055	400	22-Oct-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	388		
7	EEI	LHVEN10167	61.37	22-Oct-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	1,227		
8	EEI	LHVHS12036	1	30-Sep-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	2,900		

COTR IS2 INVOICE REVIEW:

1. Investigates IS2 errors/warnings.
2. Adequate budget for the funding source.
3. Qty/completion date are reasonable.
4. Proper caps are being applied by IS2.0
5. Repair costs are added to the measure rebate.
6. Multiple measures at one address are all low income.
7. PTCS Measure IDs are in the registry

COTR OVERSIGHT (FILE REVIEW):

1. Do invoices support the claimed measure/repair costs, completion dates, units claimed and specification requirements for each measure?
2. Does home type in the file match what was claimed?
3. Since this was a CAP job, we know it meets criteria for household occupants per level of income. If it wasn't done through a CAP agency, COTR will need to review something from the utility indicating that they had verified the income/occupants from a verifiable source.
4. Does paperwork support insulation square feet and pre/post R values?

Acknowledgments

This guide would not have been possible without the hard work, dedication and generosity of the members and steering committee of the Low-Income Energy Efficiency Workgroup. These members contributed their stories, lessons learned and recommendations to assist other low-income energy-efficiency implementers in expanding their work and impact.

Thank you for your contributions.

With Appreciation,
Amy Burke, program manager, Low-Income Energy Efficiency
Carrie Nelson, former Low-Income Energy Efficiency Grants program manager
Jess Kincaid, Residential sector lead
Liz Oberhausen, public utility specialist, Power Services Internship Program

Appendix A: Glossary of Terms and Acronyms

TERMS AND ACRONYMS	
aMW	Average Megawatts
BPA	Bonneville Power Administration
CAA	Community Action Agency
CAP	Community Action Program
COTR	Contracting Officer's Technical Representative
Council	Northwest Power and Conservation Council
ECA	Energy Conservation Agreement. The contractual mechanism for BPA to meet the energy-efficiency targets set by the Northwest Power and Conservation Council.
EEI	Energy Efficiency Incentive
IM	Implementation Manual (BPA)
Low-E	Low-emissivity for surfaces that emits low levels of radiant heat. Most commonly used to describe windows and doors.
LIEE	Low-income Energy Efficiency
LIHEAP	Low-Income Home Energy Assistance Program
UES	Unit of Energy Savings: Measures where savings are estimated on a per-unit basis (e.g., savings per light bulb) for a typical baseline case to an efficient case scenario. UES measures have relatively small variation in savings that can be reliably forecast.
WAP	U.S. Department of Energy Weatherization Assistance Program

Appendix B: Public Utilities Served by BPA

CALIFORNIA

Surprise Valley Electrification Corp.

IDAHO

City of Albion
City of Bonners Ferry
City of Burley
City of Declo
City of Heyburn
City of Plummer
City of Rupert
City of Soda Springs
City of Weiser
Clearwater Power Co.
East End Mutual Electric Co., Ltd
Fall River Rural Electric Cooperative
Farmers Electric Co., Ltd
Idaho County Light & Power Cooperative
Idaho Falls Power
Kootenai Electric Cooperative
Lost River Electric Cooperative
Northern Lights Inc.
Raft River Electric Coop
Riverside Electric Company
South Side Electric Lines
United Electric Coop

MONTANA

Central Montana Electric Power Cooperative
City of Troy
Flathead Electric Cooperative
Glacier Electric Coop., Inc.
Lincoln Electric Cooperative, Inc
Mission Valley Power
Missoula Electric Cooperative
Ravalli County Electric Co-op
Vigilante Electric Cooperative

NEVADA

Wells Rural Electric Co.City of Troy

OREGON

Blachly-Lane Electric Cooperative
Canby Utility Board
Central Electric Cooperative
Central Lincoln PUD
City of Ashland
City of Bandon
City of Cascade Locks
City of Drain
City of Monmouth
Clatskanie PUD
Columbia Basin Electric Cooperative
Columbia Power Coop Association
Columbia River PUD
Consumers Power Inc.
Coos-Curry Electric Coop
Douglas Electric Coop
Emerald PUD
Eugene Water & Electric Board
Forest Grove Light & Power
Harney Electric Cooperative, Inc.
Hermiston Energy Services
Hood River Electric Co-op
Lane Electric
McMinnville Water & Light
Midstate Electric Coop
Milton-Freewater Light & Power
Northern Wasco County PUD
Oregon Trail Electric Coop
Pacific Power
PNGC Power
Salem Electric
Salmon River Electric
Springfield Utility Board
Tillamook PUD
UIUC
Umatilla Electric Coop
Wasco Electric Cooperative
West Oregon Electric Cooperative

WASHINGTON

Alder Mutual Light Company
Asotin County PUD
Benton PUD
Benton REA
Big Bend Electric Cooperative
Chelan County PUD
City of Blaine
City of Centralia
City of Cheney
City of Chewelah
City of Ellensburg
City of Milton
City of Port Angeles
City of Richland
City of Sumas
Clallam County PUD
Clark PUD
Columbia REA
Cowlitz PUD
Douglas PUD
Elmhurst Mutual Power & Light
Energy Northwest
Ferry County PUD
Franklin PUD
Grant County PUD
Grays Harbor PUD
Inland Power and Light
Jefferson PUD
Kalispel Tribal Utilities
Kittitas PUD
Klickitat PUD
Lakeview Light & Power
Lewis County PUD
Mason County PUD #1
Mason County PUD #3
McCleary Light & Power
Modern Electric Water Co.
Nespelem Valley Electric Co-op, Inc.
Ohop Mutual Light Co.
Okanogan County PUD
Okanogan Electric Cooperative
Orcas Power & Light Coop
Parkland Light & Water
Pend Oreille PUD
Peninsula Light Co.
Port of Seattle
Seattle City Light
Skamania County PUD No.1
Snohomish PUD
Tacoma Power
Tanner Electric Coop
Town of Eatonville
Town of Steilacoom
Vera Water & Power
Wahkiakum PUD
Whatcom County PUD No.1
Yakama Power

Appendix C: Federally Recognized Tribes Served by BPA Public Utilities

The following tribes have all or part of their reservation lands served by a BPA public utility. Tribes whose reservation lands are not served by a BPA public utility may still choose to serve off-reservation tribal members located in a BPA public utility territory. Some tribes are served by more than one utility. In these cases, all homes receiving weatherization services must be located in BPA service territory.

CALIFORNIA

Cedarville Rancheria Northern Paiute Tribe

Fort Bidwell

Pit River Tribe

IDAHO

Nez Perce

Coeur D-Alene Tribe

Kootenai Tribe of Idaho

Shoshone-Paiute Tribes of the Duck Valley Reservation (Reservation spans ID-NV border)

MONTANA

Blackfeet Nation

NEVADA

Fort McDermitt Paiute-Shoshone Tribe

Shoshone-Paiute Tribes of the Duck Valley Reservation

OREGON

Confederated Tribes of Siletz

Confederated Tribes of the Umatilla Indian Reservation

Confederated Tribes of the Warm Springs Reservation of Oregon

Cow Creek Band of Umpqua

Fort McDermitt Paiute-Shoshone Tribe (Reservation spans OR- NV border)

WASHINGTON

Cowlitz Indian Tribe

Confederated Tribes and Bands of the Yakama Nation

Confederated Tribes of the Colville Reservation

Hoh Indian Tribe

Jamestown S'Klallam Tribe

Kalispel Tribe of Indians

Lower Elwha S'Klallam Tribe

Makah Indian Tribe

Nooksack Indian Tribe

Puyallup Indian Tribe

Quileute Nation

Quinault Indian Nation

Shoalwater Bay Tribe

Skokomish Tribal Nation

Snoqualmie Indian Tribe

Squaxin Island Tribe

Stillaguamish Tribe of Indians

The Confederated Tribes of the Chehalis Reservation

Tulalip Tribes

Appendix D: Community Action Agencies by State

IDAHO COMMUNITY ACTION AGENCIES

AGENCY	SERVICE AREA	CONTACT
Community Action Partnership	Benewah, Bonner, Boundary, Clearwater, Idaho, Kootenai, Latah, Lewis, Nez Perce and Shoshone counties	Phone: (208) 746-3351 www.cap4action.org
Community Council of Idaho	Counties in Southern Idaho	Phone: (208) 454-1652 www.communitycouncilofidaho.org
Eastern Idaho Community Action Partnership	Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison and Teton counties	Phone: (208) 522-5391 www.eicap.org
El-Ada Community Action Partnership	Ada, Elmore and Owyhee counties	Phone: (208) 377-0700 www.eladacap.org
Metro Community Services	Adams, Boise, Canyon, Gem, Payette, Valley and Washington counties	Phone: (208) 459-0063 www.metrocommunityservices.net
South Central Community Action Partnership	Blaine, Camas, Cassia, Gooding, Jerome, Twin Falls, Lincoln and Minidoka counties	Phone: (208) 733-9351 www.sccap-id.org
Southeastern Idaho Community Action Agency	Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida and Power counties	Phone: (208) 232-1114 www.seicaa.org
Western Idaho Community Action Partnership	Adams, Boise, Canyon, Gem, Payette, Valley and Washington counties	Phone: (208) 642-9086 www.wicap.org

MONTANA COMMUNITY ACTION AGENCIES

AGENCY	SERVICE AREA	CONTACT
Action for Eastern Montana	Carter, Custer, Daniels, Dawson, Fallon, Garfield, McCone, Phillips, Powder River, Prairie, Richland, Roosevelt, Rosebud, Sheridan, Treasure, Valley and Wibaux counties	Phone: (406) 377-3564 https://aemt.org/our-services/energy/
Action Inc. Human Resource Council	Beaverhead, Deer Lodge, Granite, Madison, Powell and Silver Bow counties	Phone: (406) 533-6855 https://butteassistanceprograms.org/free-weatherization/
Community Action Partnership of NW MT	Flathead, Lake, Lincoln and Sanders counties	Phone: (406) 758-5433 https://www.capnm.net/weatherization

AGENCY	SERVICE AREA	CONTACT
District IV Human Resources Development Council	Blaine, Hill and Liberty counties	Phone: (406) 265-6743 https://hrdc4.org/energy/
District IX HRDC	Gallatin, Meagher and Park counties	Phone: (406) 587-4486 https://thehrdc.org/how-we-help/energy/home-weatherization/
District VI HRDC Centennial Plaza	Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum and Wheatland counties	Phone: (406) 587-4486 https://thehrdc.org/how-we-help/energy/home-weatherization/
District VII HRDC	Big Horn, Carbon, Stillwater, Sweet Grass and Yellowstone counties	Phone: (406) 247-4778 http://hrdc7.org/how-we-help/energy-assistance/#Weatherization
District XI Human Resource Council	Missoula, Mineral and Ravalli counties	Phone: (406) 728-3710
Opportunities Inc. Weatherization Assistance Program	Cascade, Chouteau, Glacier, Pondera, Toole and Teton counties	Phone: (406) 216-3055 https://www.oppincgf.org/our-services
Rocky Mountain Development Council	Broadwater, Jefferson, and Lewis & Clark counties	Phone: (406) 447-1625 https://www.rmdc.net/what-we-do/energy-services/weatherization.html

OREGON COMMUNITY ACTION AGENCIES

AGENCY	SERVICE AREA	CONTACT
ACCESS	Jackson County	(541) 779-6691 https://www.accesshelps.org/
Community Action of Washington County	Washington County	(503) 906-6550 https://caowash.org/programs/housing-stability/conservation.html
Community Action Programs of Eastern-Central Oregon	Gilliam, Morrow, Umatilla and Wheeler counties	(800) 752-1139 (Gilliam, Morrow and Wheeler); (541) 276-1926 (Umatilla) http://www.capeco-works.org/energy_weatherization.htm
Community Action Team	Clatsop, Columbia and Tillamook counties	(503) 325-1400 (Clatsop); (503) 397-3511 (Columbia); (503) 842-5261 ext. 203 (Tillamook) http://www.cat-team.org/energy_services.html
Community Connection of Northeast Oregon	Baker, Grant, Union and Wallowa counties	(541) 963-3186 http://www.ccno.org/
Community in Action	Harney and Malheur counties	(541) 889-9555 http://www.communityinaction.info/weatherization/
Community Services Consortium	Benton, Lincoln and Linn counties	(541) 758-2627 http://www.communityservices.us/housing/weatherization/
Community Solutions of Clackamas County	Clackamas County	(503) 650-3338 http://www.clackamas.us/community solutions/weatherization.html

AGENCY	SERVICE AREA	CONTACT
Homes for Good	Lane County	(541) 682-2561 https://homesforgood.org/programs/weatherization
Mid-Columbia Community Action Council	Hood River, Sherman and Wasco counties	(541) 298-5131 https://mccac.com/energy-assistance/
Mid-Willamette Valley Community Action Agency	Marion and Polk counties	(503) 315-7055 http://mwvcaa.org/programs/wx/
Multnomah County Department of County Human Services	Multnomah County	(503) 988-7423 https://multco.us/dchs/weatherization
NeighborImpact	Crook, Deschutes and Jefferson counties	(541) 316-2034 http://www.neighborimpact.org/services/heat/home-energy-assistance/
Oregon Coast Community Action	Coos and Curry counties	(541) 435-7750 https://www.orcca.us/copy-of-energy-weatherization
Oregon Human Development Corporation	Klamath and Lake counties	(541) 883-7186 http://www.ohdc.org/weatherization-service.html
United Community Action Network	Douglas and Josephine counties	(541) 492-3932 (Douglas); (541) 956-4447 (Josephine) http://www.ucancap.org/index.php/what-we-do/weatherization
Yamhill Community Action Partnership	Yamhill County	(503) 687-1483 http://yamhillcap.org/energy

WASHINGTON COMMUNITY ACTION AGENCIES

AGENCY	SERVICE AREA	CONTACT
Benton Franklin Community Action Committee	Benton and Franklin counties	(509) 545-4042 ext. 215 http://bfcac.org/
Blue Mountain Action Council	Columbia, Garfield and Walla Walla counties	(509) 529-4980 ext. 110 http://bmacww.org/
Chelan-Douglas Community Action Council	Chelan and Douglas counties	(509) 662-6156 ext. 247 http://cdcac.org/
City of Seattle Office of Housing – HomeWise Program	City of Seattle	(206) 684-0354 http://seattle.gov/
Clark County Community Development	Clark County	(360) 397-2375 ext. 4540 http://clark.wa.gov
Coastal Community Action Program	Grays Harbor and Pacific counties	(360) 500-4528 http://costalcap.org/
Community Action Center	Whitman County	(509) 338-4241 http://cacwhitman.com
Community Action Council of Lewis, Mason, and Thurston Counties	Lewis, Mason, Thurston, Klickitat and Skamania counties	(360) 438-1100 ext. 1120 http://caclmt.org/
Community Action Partnership	Asotin County	(208) 798-4187 http://cap4action.org/

AGENCY	SERVICE AREA	CONTACT
HopeSource	Kittitas County	(509) 925-1448 ext. 240 http://hopesource.us/
Housing Authority of Skagit County	Skagit County	(360) 757-6509 http://skagitcountyha.org/
King County Housing Authority	All King County, except City of Seattle	(206) 214-1240 http://kcha.org/
Kitsap Community Resources	Kitsap County	(360) 473-2150 http://kcr.org/
Lower Columbia Community Action Council	Cowlitz and Wahkiakum counties	(360) 425-3430 ext. 226 http://lowercolumbiacap.org/
Metropolitan Development Council	City of Tacoma, only	(253) 593-2336 http://mdc-hope.org/
Northwest Community Action Center	Yakima County, south of Union Gap	(509) 865-7630 http://www.ncactopp.org/
Okanogan County Community Action Council	Okanogan County	(509) 422-4041 http://occac.com/
Olympic Community Action Programs	Clallam and Jefferson Counties	(360) 452-4726 ext. 6253 http://olycap.org/
Opportunities Industrialization Center of Washington	Adams, Grant and Yakima County, north of Union Gap	(509) 853-2275 ext. 208 http://yvoic.org/
Opportunity Council	Island, San Juan and Whatcom counties	(360) 734-5121 ext. 5 http://oppco.org/
Pierce County Housing Services	All of Pierce County, except City of Tacoma	(253) 798-7380 http://piercecountywa.gov/
Rural Resources Community Action	Ferry, Lincoln, Pend Oreille and Stevens	(509) 685-6072 http://ruralresources.org/
Snohomish County Human Services Department	Snohomish County	(425) 388-7202 http://co.snohomish.wa.us/
Spokane Neighborhood Action Partners	Spokane County	(509) 456-7627 ext. 2408 http://snapwa.org/
Washington Gorge Action Programs	Klickitat and Skamania counties	(509) 493-3954 http://wgap.ws/
Yakima Valley Farm Workers Clinic	Yakima County, south of Union Gap	(509) 865-7630 ext. 2743 http://yvfwc.org/