

# Changes and Corrections Summary for the 2016-2017 Implementation Manual

6-month notices published on April 1, 2017 and effective on October 1, 2017

| DESCRIPTION  | RATIONALE   | CHANGE OR CORRECTION? | SECTION |
|--|---|-----------------------|---------|
| <b>General</b>   |   |                       |         |
| Effective October 1, 2017, BPA will be updating its heating and cooling zone assignments. Some utilities will be assigned to a new heating or cooling zone, and the new assignments will be posted in the "October 2017 Measure Changes" document. New heating and cooling zone maps that are currently posted on the Residential Weatherization <a href="#">webpage</a> will be relocated to a more-accessible page. More information will be forthcoming using traditional communication channels. | RTF staff provided a climate zone update using current NOAA weather data.   | Change – OTHER        | n/a     |
| <b>Introduction</b>  |   |                       |         |
| There are no changes.  |   |                       |         |
| <b>Definitions</b>   |   |                       |         |
| There are no changes.  |   |                       |         |
| <b>BPA Funding</b>   |   |                       |         |
| Updates the definition for " <b>Rollover Amount</b> " from five percent to "the greater of 10 percent or \$50,000" of a utility's initial rate period budget. Both the Definition and the Inter-Rate Period Budget Flexibility in Section 2: Funding have been updated.  | This update was announced in October 2016 in BPA Administrator Mainzer's <a href="#">EE Focus 2028 Closeout Letter</a> , which memorializes the changes and direction that EE plans to take in order to improve its programs. This change is aimed at assisting smaller customers who have expressed concerns about flexibility and funding large projects. | Change – OTHER        | 2.1.1.2 |
| <b>General Requirements</b>  |   |                       |         |
| There are no changes.  |   |                       |         |
| <b>Custom Projects</b>   |   |                       |         |
| Effective October 1, 2017, BPA will be retiring all previous versions of the Option 1 Custom Project Calculator, older than version 4.0.   | BPA's reporting system, IS2.0, has compatibility issues with the older versions of the C1 file. If you need assistance converting older file versions over to 4.0, please contact your EER.   | Change – OTHER        | 4.1     |
| <b>Custom Programs</b>   |   |                       |         |
| There are no changes.  |   |                       |         |

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|--|--|---|---------|
| <b>Agricultural Sector</b>   |  |   |         |
| There are no changes.  |  |   |         |
| <b>Commercial Sector</b>   |  |   |         |
| <b>Ductless Heat Pump:</b> The post-condition rating for multiheaded systems is changing from 8.0 HSPF to 8.2 HSPF. This change is consistent with the Residential Sector.   | Provides six-months notice to address that current requirements incorrectly list 8.0 HSPF for multihead systems. As of January 1, 2015, the Federal minimum HSPF for split-system heat pumps is 8.2.         | Correction  | 7.4.2   |
| <b>Heat Pump Conversion (BPA-Qualified):</b> Provides six-months notice that the Heat Pump Conversion measure will be retiring.  | BPA will be replacing the current Heat Pump Conversion measure with a new, streamlined Heat Pump Conversion measure on October 1, 2017.  | Change – measure change – expiration of measure           | 7.4.3   |
| <b>Heat Pump Conversion (updated measure):</b> This measure replaces the retired Heat Pump Conversion measure.   | In the new measure, which will be effective on October 1, 2017, BPA has removed several heat pump conversion requirements and deemed the savings value for more streamlined implementation.                  | Change - measure change - new measure                     | 7.4.3   |
| <b>Insulation:</b> The commercial insulation measures will be simplified, incentives will increase, and the measures will be expanded to simplify measure interpretation and implementation.   | These BPA-Qualified measures see little uptake, though savings are promising. By increasing the willingness to pay, and by making the measure easier to understand and implement, we aim to increase uptake. | Change – payment change – up or down                      | 7.5.1   |
| <b>Industrial Sector</b>   |  |   |         |
| <b>SEM Projects (Optional Energy Management Feature):</b> Provides six-months notice that the due date for the PTS design proposal is being modified from “completion of T&T scoping” to “prior to installation of PTC.”   | The language is being clarified to reflect that the PTS design may not be related to scoping.  | Change – requirement change – substitution of requirement | 9.3.1.2 |
| <b>Limited Availability Small Industrial High Performance Energy Management:</b> Effective October 1, 2017, this program will expire and this section will be removed from the IM.   | Provides six-months notice for the expiration of this measure. The ESI Small Industrial SEM (no longer HPEM) pilot is complete and it is now part of SEM Projects.   | Correction  | 9.3.1.3 |
| <b>Residential Sector</b>  |  |   |         |
| <b>ENERGY STAR CFLs and Linear Fluorescent Fixtures:</b> Effective October 1, 2017, CFL lamp measures will expire and will not be replaced.  | Measure is expiring because of decreased savings and reduced market share.   | Change – measure change – expiration of measure           | 10.2.1  |
| <b>ENERGY STAR Solid-State Lighting/Light Emitting Diodes Bulbs and Fixtures:</b> Effective October 1, 2017, the LED bulbs and fixtures section will read, “The base case for LEDs factors in current socket saturation and Energy Independence and Security Act (EISA) compliance; uses a weighted average of incandescent, halogen and CFL bulbs.” | Updates the Basis for Energy Savings to provide additional clarity.  | Change – OTHER  | 10.2.2  |

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|--|--|--|----------|
| <b>ENERGY STAR Solid-State Lighting/Light Emitting Diodes Bulbs and Fixtures:</b> Effective October 1, 2017, LED bulb and LED fixtures' savings will decrease and lumen bins will be established for fixtures. For a very few types of LED bulbs, the savings will increase. | Aligns with new RTF LED lamp and fixture measures.   | Change – savings change – up or down                 | 10.2.2   |
| <b>ENERGY STAR Solid-State Lighting/Light Emitting Diodes Bulbs and Fixtures:</b> Effective October 1, 2017, LED bulb and LED fixtures' payments will decrease.  | Aligns with new RTF LED lamp and fixture measures.   | Change – payment change – up or down                 | 10.2.2   |
| <b>ENERGY STAR Solid-State Lighting/Light Emitting Diodes Bulbs and Fixtures:</b> Effective October 1, 2017, the Shop Light measures will expire and will not be replaced.   | The RTF-approved measures for shop lights estimated savings are too low to provide a payment on. New data indicates that the efficacy of LED shop lights is only marginally more efficient than the linear fluorescent technologies in the baseline. | Change – measure change – expiration of measure      | 10.2.2   |
| <b>Appliances:</b> Effective October 1, 2017, residential appliance measures (clothes washers and clothes dryers) are allowable for incentives in commercial applications.   | Removes some conditional requirements to enable customers to use these measures in small numbers of light commercial businesses.   | Change – requirement change – removal of requirement | 10.4     |
| <b>Refrigeration and Freezer Decommissioning:</b> Effective October 1, 2017, refrigerator and freezer decommissioning measures will expire and will not be replaced.   | These measures are expiring due to decreasing numbers of older vintage units and to align with other regional offerings.   | Change - measure change - expiration of measure      | 10.5     |
| <b>Showerheads:</b> Effective October 1, 2017, showerhead savings will decrease.   | Provides six-months notice of decreasing savings to align with the RTF's updated showerhead savings.   | Change - savings change - up or down                 | 10.6.1   |
| <b>BPA Simple Steps, Smart Savings Retail Promotion:</b> Effective October 1, 2017, duplicates of current measures will be created specifically for the Simple Steps program. Utility measures for residential lighting, showerheads and appliances will remain unchanged.   | Creates additional reference numbers specifically for Simple Steps to improve reporting and evaluation data, and to differentiate between Simple Steps savings and utility program savings.  | Change – measure change – new measure                | 10.7     |
| <b>BPA Simple Steps, Smart Savings Retail Promotion:</b> The language in the Simple Steps section will be updated to reflect the requirement to provide details of retail savings reporting methodologies, which are different from the Retail Sales Allocation Tool (RSAT). | Provides six-months notice of the creation of a new requirement to clarify that when not using the RSAT, alternative retail savings reporting methodologies must be provided for review. This is so BPA can detect and prevent double counting.      | Change – requirement change – new requirement        | 10.7     |
| <b>Ductless Heat Pumps:</b> Correcting Multihead HSPF of 8.0 to reference current Federal Minimum Standard of 8.2. This change is consistent with the Commercial Sector.   | Provides six-months notice to address that current requirements incorrectly list 8.0 HSPF for multiheaded systems. As of January 1, 2015, the Federal minimum HSPF for split-system heat pumps is 8.2.   | Change - requirement change - new requirement.       | 10.8.1   |
| <b>Air Source Heat Pumps and Variable Speed Heat Pumps:</b> Heat Pump Conversion savings reduction. Refer to the "October 2017 Measure Changes Document."  | Provides six-months notice that there will be updated savings data.  | Change – savings change – up or down                 | 10.8.2.1 |
| <b>Ground Source Heat Pumps:</b> Loop design documentation will be added to the Documentation Requirements.  | Current documentation does not include technicians to submit loop design documentation which supports verification of correct system sizing.   | Change - requirement change - new requirement        | 10.8.2.2 |

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| <b>Ground Source Heat Pumps:</b> Provides six-months notice for a change in the measure savings. Refer to the "October 2017 Measure Changes Document."   | SEEM calibration results in updated savings for all Ground Source Heat Pump measures.  | Change – savings change – up or down            | 10.8.2.2 |
| <b>Ground Source Heat Pumps:</b> Provides six-months notice that BPA will be expiring all new construction reference numbers and replacing them with new reference numbers.  | Replaces separate upgrade and conversion new construction measures with one set of measures that use a weighted baseline.  | Change – measure change – expiration of measure | 10.8.2.2 |
| <b>Duct Sealing – PTCS or Prescriptive:</b> Decrease in savings for Duct Sealing in manufactured homes. Refer to the "October 2017 Measure Changes Document."  | BPA is using PTCS impact evaluation results to analyze and estimate updated savings.   | Change – savings change – up or down            | 10.8.2.3 |
| <b>Duct Sealing – PTCS or Prescriptive:</b> Decrease in Payment for Duct Sealing in manufactured homes. Refer to the "October 2017 Measure Changes Document."  | BPA is using PTCS impact evaluation results to estimate updated savings and associated payment.  | Change – payment change – up or down            | 10.8.2.3 |
| <b>Duct Sealing – PTCS or Prescriptive:</b> Decrease in Payment for Duct Sealing in manufactured homes. Refer to the "October 2017 Measure Changes Document."  | BPA is using PTCS impact evaluation results to estimate updated savings and associated payment.  | Change – payment change – up or down            | 10.8.2.3 |
| <b>Line-Voltage Thermostats:</b> Provides six-months notice that the savings are going from a per-home to a per-unit basis.  | This change will allow the savings to be captured on a per unit approach.  | Change – savings change – up or down            | 10.9     |
| <b>Line-Voltage Thermostats:</b> Provides six-months notice that the incentive is changing from per-home to per-thermostat.  | This change allows payments to be made on a per-unit approach.   | Change – payment change – up or down            | 10.9     |
| <b>New High Performance Manufactured Homes:</b> Provides six-months notice for the expiration of this measure.   | Manufacturers are no longer building to this specification and this program is no longer supported by NEEA or Northwest Energy Works.  | Change – measure change – expiration of measure | 10.10.2  |
| <b>New ENERGY STAR/Built Green Single-Family Homes (OR, WA):</b> Provides six-months notice for the expiration of this measure.  | The energy savings for this measure were expired by the RTF.   | Change – measure change – expiration of measure | 10.10.3  |
| <b>Montana House (v2.0):</b> Modifies payment structure to Montana House payments. Payment levels for shell measures for all heating types, except ground source heat pumps, will remain the same, but shell measure payment levels for home with ground source heat pumps will decrease to \$500. However, payment for ground source heat pumps (with and without DeSuperheater) will increase to the payment level of stand-alone measure payment, resulting in an increase in overall payments. PTCS Variable Speed Heat Pump payments will also increase. Montana House Duct-Sealing payments will expire. | Current Montana House payments for homes that heat with ground source heat pumps are less than payments for stand-alone heating measures. This modification aligns measure payments and reflects the additional energy savings of Montana House shell measures in homes heated with ground source heat pumps. Montana House Duct Sealing payments will expire because the current specifications (v2.0) requires that all ducts be located inside the heated area. | Change - payment change - up or down            | 10.10.4  |
| <b>New ENERGY STAR Multifamily Construction:</b> Provides six-months notice for the expiration of this measure.  | This measure was expired by the RTF for Oregon and Washington and is no longer supported by NEEA in any state (ID, MT, OR, WA).  | Change – measure change – expiration of measure | 10.10.5  |

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| <b>Insulation:</b> Change in Multifamily Weatherization payment and energy-savings levels.  | Some payment and energy-savings levels for multifamily weatherization will change due to new RTF measure analysis. Attic insulation payments will decrease, some floor insulation payments will decrease, and some wall insulation payments will increase.  | Change – payment change – up or down | 10.11.1  |
| <b>Low-Income Weatherization, Ductless Heat Pumps and Duct Sealing:</b> Clarifies the language that income qualification for multifamily dwellings may be made by building or complex. Clarifies that certification by a LIHEAP program administrator will meet income documentation requirements. Deletes duplicated language. Removes requirements and specifications language and instead points to relevant measure sections. | Responds to questions received from utilities on the implementation of low-income measures.   | Change – OTHER                       | 10.11.7  |
| BPA may merge multifamily new construction and multifamily weatherization measures from the current “residential” and “commercial” multifamily distinction into a single comprehensive program. The list of areas potentially affected are: Definitions, Section 7: Commercial, and Section 10: Residential.  | Removes duplication and eases implementation.   | Change - other                       | Multiple |
| <b>Utility Distribution Sector</b>  |   |                                      |          |
| There are no changes.   |   |                                      |          |
| <b>Multi-Sector</b>   |   |                                      |          |
| BPA will reorganize the Multi-Sector Section and corresponding measures so that they are located in their respective section of the IM where they are most commonly used. Measure list changes will reflect how to use the measures by sector.  | The Multi-Sector Section of the IM causes confusion for interpretation of how to implement the measure. By putting the measure in the section where it is most commonly used (and noting that it may be used in other applications), the goal is for more uptake, more flexibility in how the measures are approached, and simplified interpretation. | Change – OTHER                       | 12       |