



Audio instructions

Welcome to BPA's Webex Meeting!

Note: Your audio is muted upon entry.

Audio connection **Preferred choice**

Use computer audio

Call me at +1

Call in Call me at

Don't connect to audio

Note: The incoming call may be listed as **POTENTIAL SPAM**.

Second choice: In the example above, instead select **Call in** and use your phone to call into the webinar. A window will pop-up with your meeting **Call in** information.

Call In

Call in from another application

- Call**
US Toll
+1-415-XXX-XXX
[Show all global call-in numbers](#)
- Enter**
Access code: XXX XXX XXXX #
Attendee ID: XXXXXX #

Last choice: Use Computer for Audio. Connect a headset to your computer for best results.

BONNEVILLE ADMINISTRATION
Viewing BPA Computer's ap...

PRESENTATION
ENERGY EFFICIENCY

Mute Start video Share ...

Participants Chat ...

Use to mute and unmute

Use to express emotion

Use to view participant list and chat panel

Low Income Regional Workgroup

August 8, 2024



The image features a scenic landscape with a body of water, mountains, and tall grass in the foreground. A white text box is overlaid on the right side of the image, containing the text "Logistics & Safety".

Logistics & Safety

Logistics

- › Bathrooms down the hall on the left
- › Water fountains outside the door on the left
- › Ok to step out to pay a parking meter
- › *Please remember that MAX trains are right outside, so be aware when crossing the tracks*

Evacuation

- › Attending in Person?
 1. Stairwell is across the hall (*DO NOT TAKE ELEVATORS!*)
 2. Go to Holliday Park, across the MAX tracks (*USE THE CROSSWALKS TO CROSS TRACKS!*)
- › Attending at home?
 - › Please find your work area's nearest evacuation point
 - › No need to notify us if you need to evacuate unless you need help

Today's Agenda

9:00am	Safety & Logistics	
9:10am	Welcome & Introductions	
9:15am	Workgroup Topics	
9:20am	State & Federal Funding Implementation	Danielle Walker (DOE) Phillip Kelsven (BPA) Ken Robinette (ID) <i>Susie Snyder, Discussion Facilitator</i>
10:20am	<i>BREAK</i>	
10:30am	Collaboration through Program Sharing	Travis Hardy (OR) Esteban Monero Chacon (OR) Melissa Rice (MT) <i>Kirsten Midura, Discussion Facilitator</i>
11:30am	<i>LUNCH</i>	
12:30pm	Breakout Sessions: Utility & CAP Partnership Experiences <i>Facilitators: Lindsey Hobbs, Brice Lang, Dena Hilde, Corinne Mauck</i>	
1:30am	<i>BREAK</i>	
1:40pm	Discussion & Poll: BPA Low-Income Program Name	
1:55pm	Open Discussion	
2:25pm	Closing	



Welcome & Introductions by State

*Please say your name & affiliation
or enter it in the chat*

Workgroup Information

Listed on the [BPA Low-Income Webpage](#):

- *Workgroup Charter with Steering Committee Members*
- *Current & Past Meeting Materials*
- *(In Green) Workgroup Discussion Topic Reference List*

Low-Income Workgroup & Related Resources

Regional Low-Income Energy-Efficiency Workgroup

BPA coordinates a regional Low-Income Energy Efficiency Workgroup. The mission of this group is to share information and develop best practices to improve access to energy efficiency projects for qualifying residents across the Pacific Northwest. All meetings are public and BPA welcomes anyone interested in supporting the workgroup, including but not limited to all BPA-served public utilities, low-income advocacy groups, community action partnerships (CAPs), tribal governments and staff, state energy offices, and other interested parties.

For more detail, reference the Workgroup Charter here: [Structure and Organizing Principles for the BPA Northwest Low-Income Energy Efficiency Workgroup](#) (amended July 2024).

To glance at what discussion topics that BPA and the Workgroup Steering Committee are aware of and will consider for future meetings, click on the [Low-Income Workgroup Discussion Topic Reference List](#).

Interested in getting involved with the LIEE Workgroup? Contact Amy Burke, Low-Income Energy Efficiency Program Manager, at aaburke@bpa.gov to be added to the workgroup mailing list. All meetings will be posted to [BPA's Presentation & Webinars events page](#).

Meetings Material Archive

Meeting #21, August 8, 2024, 9am - 2:30pm PDT (In-person with remote access option)

- [Agenda](#)
- [Add to Calendar](#)
- [Join Webex Meeting](#)

Workgroup Reference List

- ✓ Not ordered by priority
- ✓ No guarantee of immediate discussion
- ✓ Central spot for workgroup members, steering committee, BPA staff, and others to reference when guiding future discussions
- ✓ Will be updated as needed

Discussion Topic Reference List:
BPA Northwest Low-Income Energy Efficiency Workgroup
(Amended July 2024)

Background

This reference document is a list of topics that participants have expressed interest in discussing in the Low-Income Workgroup at some point. This list is not organized in any particular order. In the interest of transparency, the BPA Low-Income team felt it was necessary to have a repository of topics that are critical to people and organizations implementing Low-Income programming around the region.

The selected Low-Income Workgroup Steering Committee is tasked with helping to prioritize this long list of discussions topics along with feedback from the wider Workgroup. This list will be added to periodically as well as used as a reference when considering future discussions.

For Reference, this Workgroup's mission, background, objectives, and implementation structure are all included in the this group's "[Structure and Organizing Principles](#)".

Discussion Topic Reference List

General

- Energy Burden/Equity
- Outreach Strategies
- Health & Safety
- Client Education
- DOE WAP Updates
- HUD Code Updates
- Income Levels
- Manufacturer and Labor Liability Challenges
- Membership Challenges
- Point of Purchase Incentive Options
- Improved Implementation for Property Owners and Tenants
- How to Navigate Rising costs
- Agreeing Upon Criteria for Income Qualification (e.g. SMI, AMI, and Other Guidelines)
- Power Plan Updates
- Residential Building Stock Assessment (RBBSA) Overview
- BPA Evaluation and Research Updates
- BPA 101: The Life of a BPA Energy Efficiency Measure
- Implications of Potential Added Electric Load and Costs when Fuel Switching

Collaboration & Partnerships

- Utility and CAP Partnership Development
- Contractor and CAP Partnership Development
- Collaboration of Program Sharing
- Contractor Dispute Resolution
- Integrating EE programs with Other Assistance Programs

Workforce

- Workforc
- Workforc

Administrative

- Data Coll
- CETA (Cle
- Bill Assist
- Income V
- Contract
- Audit Hor
- Funding C
- CAP Adm
- Integrati
- Utility Re

Funding


- Braiding
- Additiona
- Incentive
- CAP Fund

Measure Oppor

- Multifam
- Electrifica
- Direct Ins
- Fuel Swit
- Technical
- Weather
- Repair Co
- New Tech
- Ductless
- Understa
- DOE SIR
- BPA Deer

Programs

- Improvin
- Updating
- BPA Paym
- Bundling

A scenic landscape photograph featuring a body of water in the middle ground, with mountains in the background and tall grasses in the foreground. The scene is bathed in warm, golden light, suggesting a sunset or sunrise. The image is partially obscured by a white rectangular box containing text and a dark blue background on the right side.

State & Federal Funding Implementation



Panel:

Danielle Walker (DOE)

Phillip Kelsven (BPA)

Ken Robinette (South Central CAA, ID)

Open Discussion:

Facilitator: Susie Snyder (OTEC)



IRA Home Energy Rebates

Danielle Walker, *DOE*
*IRA Home Energy Rebates Data,
Tools, & Evaluation Supervisor*



SCEP
STATE & COMMUNITY ENERGY PROGRAMS

Home Rebate Programs

\$8.8 Billion Total Funding

'HOMES'

Up to \$8,000 per home for 15-20% whole-home energy savings

Rebates double for LMI households

'HEAR'

Up to \$14K per home for qualified efficient electric equipment

LMI Only

Program Guidance Pillars

Minimize
Energy Bills



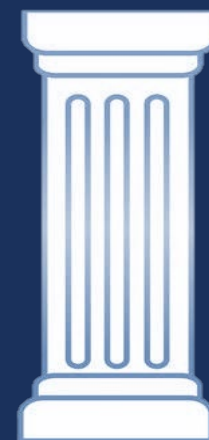
Serve
Disadvantaged
Communities &
Low-Income
Households



Consumer
Protection



Layer Benefits
with Other
Programs

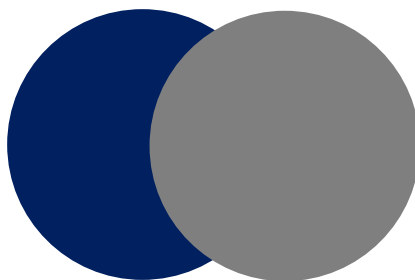


Program Integration

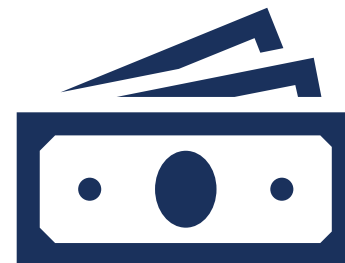
States are strongly encouraged to design programs for effective combinations of funding sources and integration with existing programs



Braiding



Co-Funding



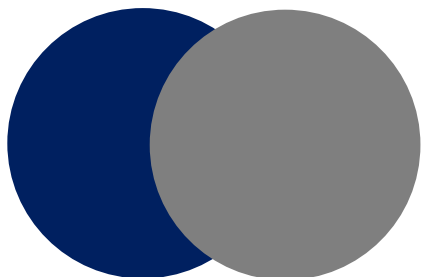
Tax Credits

Braiding



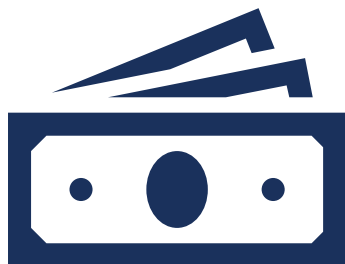
- Must “braid” and use other federal grants to fund distinct and separable measures from “single upgrades” funded by rebate.

Co-Funding



Can co-fund any remaining costs for the same "single upgrade" above the value of the Home Energy Rebate.

Tax Credits



Reduce basis amount of the expenditure on which tax credit is claimed by rebate, then claim a tax credit based on the remainder of the cost.

Thank You



SCEP

STATE & COMMUNITY ENERGY PROGRAMS

Bonneville
POWER ADMINISTRATION



***Phillip Kelsven,
Energy Efficiency
Representative***



South Central Community Action Partnership

Established 1967

War on Poverty

Ken Robinette, Chief Executive Officer



Private 501(c)3 Non-Profit Serving South Central Idaho in the Counties of:

Blaine, Camas, **Cassia**, Gooding, Jerome, Lincoln, **Minidoka** & Twin Falls

BPA Funding provided in Cassia & Minidoka Counties Provide WZ Service's to 12 CO-OP's

SCCAP's Five Core Programs

***96% Federally Funded
4% Local Government & Private Donations***

Emergency Services/Family Stability

Energy Conservation/Weatherization

Food Distribution

Heat Bill Assistance

Affordable Housing

***Federal / Private
Matched Funds
Blended- Braided
Stacked***

***Leveraged vs. Buy Down
Landlord Contributions***

WPN 22-9

(58 FR 41, Multi Family)

Shifting - Transfer

***SCCAP Federal Funds
5 Year Average w/ BPA
2019 thru 2023***

81 Homes Completed

BPA- \$643,757 Avg. \$7,948

DOE- \$249,714 Avg. \$3,082

HHS LIHEAP- \$73,007 Avg. \$901

Total Matched Funds- \$322,721/ 33%

No Landlord Contributions

Total Combined- \$966,478 Avg. \$11,932

Thank You






Discussion: Improving Visibility of Available Funding Sources

Facilitator:

Susie Snyder, Oregon Trail Electric Co-Op



Short Break

A scenic landscape photograph featuring a body of water in the middle ground, with mountains in the background under a clear sky. In the foreground, there are tall, thin grasses. The image is partially obscured by a white rectangular box containing text and a dark blue background on the right side.

Collaborative Program Sharing



Panel:

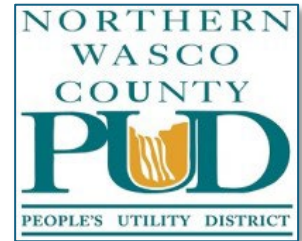
Travis Hardy (No. Wasco PUD)

Esteban Montero Chacon (Homes for
Good; Eugene, OR)

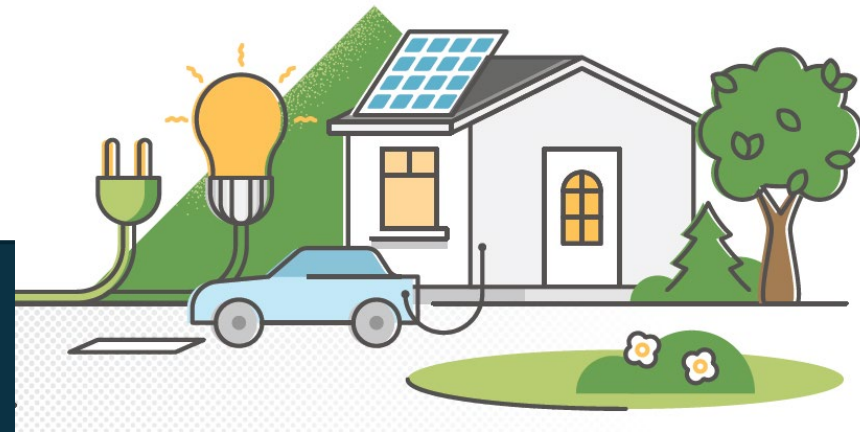
Melissa Rice (CAP of NW Montana)

Open Discussion:

Facilitator: Kirsten Midura (BPA CFTE)



The Evolution of NWCPUD Energy Efficiency Upgrade Programs (EEUP)



Single Family and Multifamily Residential
Income Qualified (IQ) and Traditional (T)

Improvements and Innovations

Travis Hardy
Energy Management Supervisor

The Evolution of
NWCPUD Energy Efficiency
Upgrade Programs (EEUP)

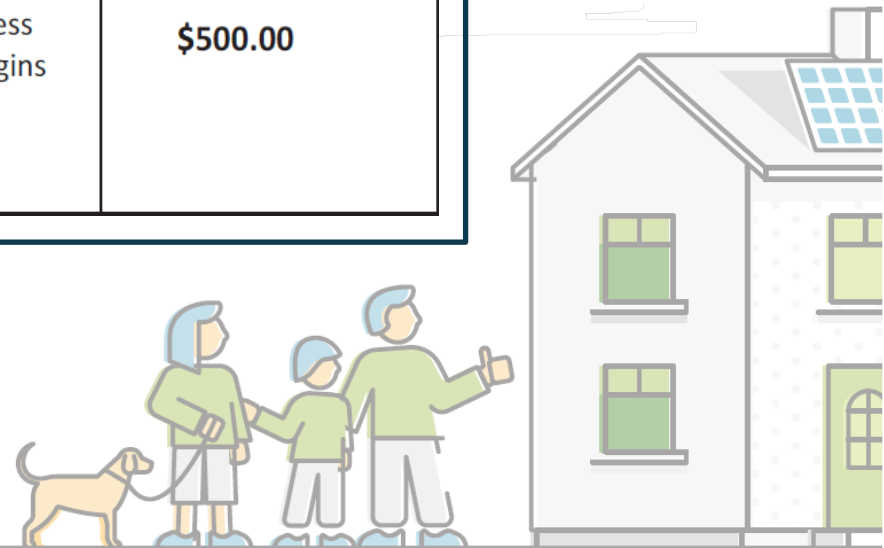
Single Family and Multifamily Traditional Energy
Efficiency Upgrade Programs (TEEUP)

New Bonuses and KPI (Avg. \$/kWh)

Effective August 1, 2024

Military Veteran & Personnel (MVP) Bonus	Add 10% to all listed TEEUP rebate amounts for eligible measures installed in any qualifying single-family home or rental.	Additional 10% Rebate
Weatherization Multi-Measure Bonus (MMB)	Multi-Measure Bonus (MMB) incentives will be issued to TEEUP customers completing three (3+) or more weatherization measures at one site address within six months. The six month time frame begins from the invoice date of the first completed measure.	\$500.00

EM Department TEEUP budget average cost per kWh saved in July 2024 = \$0.20/kWh



The Evolution of NWCPUD Energy Efficiency Upgrade Programs (EEUP)

Single Family and Multifamily Income Qualified Energy Efficiency Upgrade Programs (IQEEUP)

IQEEUP 1.0 vs IQEEUP 2.0: Evolution and Timeline

February 18, 2015 – July 31, 2024

IQEEUP 1.0 → IQEEUP for Homeowners, Tenants & Landlords

Previous iteration of household income determinant rebate levels:

- Per-application income verification fee to qualify applicants for no-cost measures (CAP, ESG)
- 100% of all participating IQEEUP customer-owner project costs paid directly to the installing contractor in a 'no-cost to homeowner' scenario payment structure
- Funded through BPA Energy Efficiency Incentive (EEI) reimbursement and Energy Management (EM) department budget funds
- EM Department IQEEUP budget cost per kWh saved ranges between \$2.49/kWh to \$5.35/kWh

August 1, 2024 – December 31, 2024

IQEEUP 1.0 & 2.0

Current iteration of household income determinant rebate levels:

- IQEEUP 2.0 begins and runs concurrently while final IQEEUP 1.0 projects are completed under previous payment structure
- Substantially increased IQEEUP rebate schedule for all measures immediately available to customers receiving a discounted rate schedule
- Most projects funded 100% through BPA EEI reimbursements to provide a very low-cost scenario rebate structure for qualifying customer-owners
- EM Department IQEEUP budget average cost per kWh saved in July 2024 = \$4.99/kWh

Effective January 1, 2025

IQEEUP 2.0 → IQEEUP for Residential Customer-Owners

- Average EM Department IQEEUP project cost per kWh saved after full implementation is expected to be less than \$0.50/kWh

The Evolution of NWCPUD Energy Efficiency Upgrade Programs (EEUP)

Single Family and Multifamily Income Qualified Energy Efficiency Upgrade Programs (IQEEUP)

IQEEUP 2.0 Income Verification & Maximum Rebates

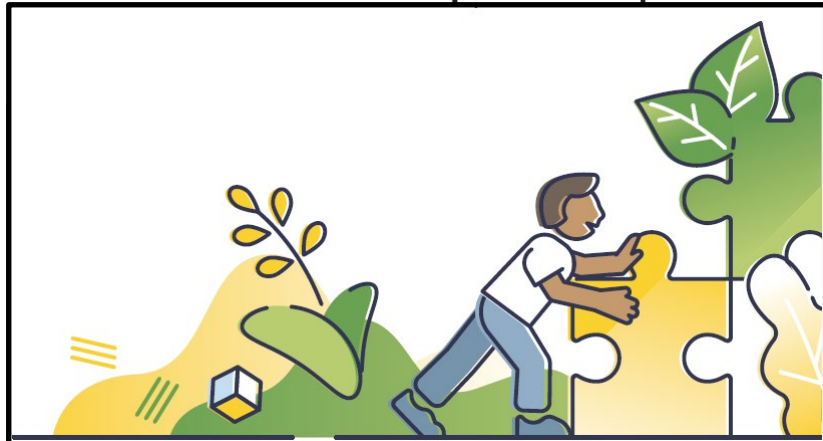
Rate Schedule 110?

Rate Schedule 135?

**IQEEUP 2.0 Rebates =
\$ for \$ (up to maximum \$)**

HVAC Measures <i>Pre-Approval Required</i>	Weatherization Measures <i>Pre-Approval Required</i>
Prescriptive Duct Sealing	Attic Insulation
Forced Air Furnace (FAF) --> Air Source Heat Pump (ASHP)	Floor Insulation
FAF --> Variable	Wall Insulation

Appliance Measure	Building Type	Maximum Rebate
ENERGY STAR Refrigerator	Single Family or Multifamily Residential	\$75.00
ENERGY STAR Clothes Washer	Single Family Residential	Up to \$700.00
	Multifamily Residential (Common Areas Only)	Up to \$700.00
ENERGY STAR Clothes Dryer	Single Family or Multifamily Residential	Up to \$700.00
BPA-Tiered Clothes Dryer	Single Family or Multifamily Residential	Up to \$700.00



The Evolution of NWCPUD Energy Efficiency Upgrade Programs (EEUP)

Single Family and Multifamily Energy Efficiency Upgrade Programs (All EEUPs)

Improvements and Successes in Energy Management Processes & Contractor Communications

- ✓ **Eliminates urgency for enrollment, ‘competitiveness’ for spot on waiting list, workflow bottlenecks and project delays due internal and external resource limitations.**
- ✓ **IQ 2.0 drops EM’s risk exposure to TEEUP levels while supporting 100% customer-owner contracted upgrades**
- ✓ **Revamped rebate structure eliminates the necessity for creating and maintaining IQ vendor contracts, purchase orders, invoice processing, contractor management, etc.**

Comfort Ready Home Contractor Finder

Your hometown NWCPUD Energy Management Team has partnered up with Comfort Ready Home, and we have taken customer feedback to heart.

This comprehensive, region-wide search engine contains NW contractors who are willing and able to serve NWCPUD customers participating in any of our residential EEUPs.

Visit the [Comfort Ready Home website](#) to use the Contractor Finder.



Are you a contractor ready to be connected with homeowners in your service area looking to make energy-efficient home upgrades? You can find training, resources and sales tools to help you perform energy-efficient insulation, windows, HVAC and water heating installations at the [Comfort Ready Home Contractor InfoHub](#).

EEUP Contractor Portal

You Have EEUP questions? We Have EEUP Answers!

Are you a residential energy efficiency Contractor working with a NWCPUD customer to install energy savings measures in their home? Have you been contacted by a homeowner or multifamily property owner interested in receiving energy efficiency upgrade rebates through one of our Energy Efficiency Upgrade Program (EEUP) platforms? Is your staff wondering how to best help provide a positive and seamless rebate experience with the Energy Management Team to better serve your new and existing customers?



These common Contractor questions are now answered in an all new Contractor Documentation Guide series designed for each group of EEUP measures. In these helpful, step-by-step guides, you will find customer links to specific EEUP platforms on the NWCPUD website, requirements for each program measure, rebate applications, project information forms, assign payment forms, sample invoices, and more!

- [EEUP for Weatherization \(Insulation, Windows, Exterior Doors, and Prescriptive Duct Sealing\) – Contractor Documentation Guide \(PDF\)](#)
- [EEUP for HVAC \(DHP, VSHP, ASHP\) – Contractor Documentation Guide \(PDF\)](#)
- [EEUP for HPWH – Contractor Documentation Guide \(PDF\)](#)
- [Residential EEUP Rebate Inspection Request & Assign Payment Form](#)

Are you ready to be connected with homeowners in your service area looking to make energy-efficient home upgrades? Here you can find training, resources and sales tools to help you perform energy-efficient insulation, windows, HVAC and water heating installations. Visit the [Comfort Ready Home Contractor InfoHub](#) for more information.

- [Commercial EEUP for LED Lighting – Contractor Documentation Guide \(PDF\)](#)
- [Commercial EEUP Request for Rebate Payment Form](#)

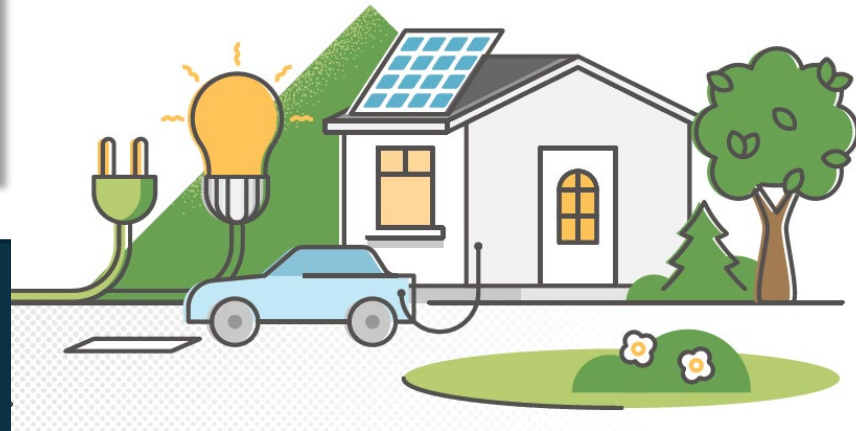
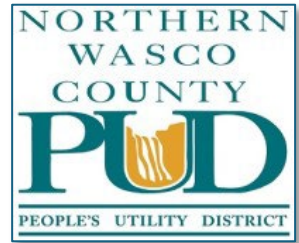
IQEEUP for Multifamily DHP – October 2024



- Eligible for \$240,000 IQEEUP Rebates
- Estimated 60,000 kWh saved annually
- 100% of rebates funded by BPA



**Future So Bright We
Gotta Wear Shades**



Questions or Comments?



***Esteban Montero
Chacon,
Energy Services Director***



***Melissa Rice,
Weatherization***

The background of the slide features a scenic landscape with a river in the foreground, mountains in the distance, and some trees. A white rectangular box is overlaid on the right side of the image, containing the text.

Open Discussion

*Facilitator:
Kirsten Midura, BPA CFTE*

Lunch!

***Will see you back online
around 12:30pm...***





**Breakout Sessions:
Utility & CAP
Partnership
Experiences**

Instructions for Online Breakouts

Room 1: Utilities

Room 2: CAPs

*~ 40 minutes w/ a 5
minute warning*

- › Self-select into applicable breakout room number.
- › Don't fall into one or the other category? Join whichever group you feel is most relevant to you.
- › Each group will have a note taker.
- › Each facilitator will provide a summary of the discussion when returning to the larger group.

Instructions for In-Person Breakouts

Utilities: Brice Lang

CAPs: Corinne Mauck

*~ 40 minutes w/ a 5
minute warning*

- › Don't fall into one or the other category? Join whichever group you feel is most relevant to you.
- › Each group will have a note taker.
- › Each facilitator will provide a summary of the discussion when returning to the larger group.

Room Numbers & Facilitators

WebEx Room	Breakout Session	Facilitator	Support/Notes
Room 1	Utility Breakout: Remote	Lindsey Hobbs	Kyla Kelsay
	Utility Group: In-Person	Brice Lang	Jonathon Belmont
Room 2	CAP Breakout: Remote	Dena Hilde	Kirsten Midura
	CAP Group: In-Person	Corinne Mauck	Amy Burke

The image features a scenic landscape with a body of water, mountains, and tall grass in the foreground. A white text box is overlaid on the right side of the image, containing the text "Breakout Session Summary Share Out" in a teal color. The background is a soft-focus landscape with a body of water, mountains, and tall grass in the foreground. The text is centered within the white box.

**Breakout
Session
Summary
Share Out**



Short Break



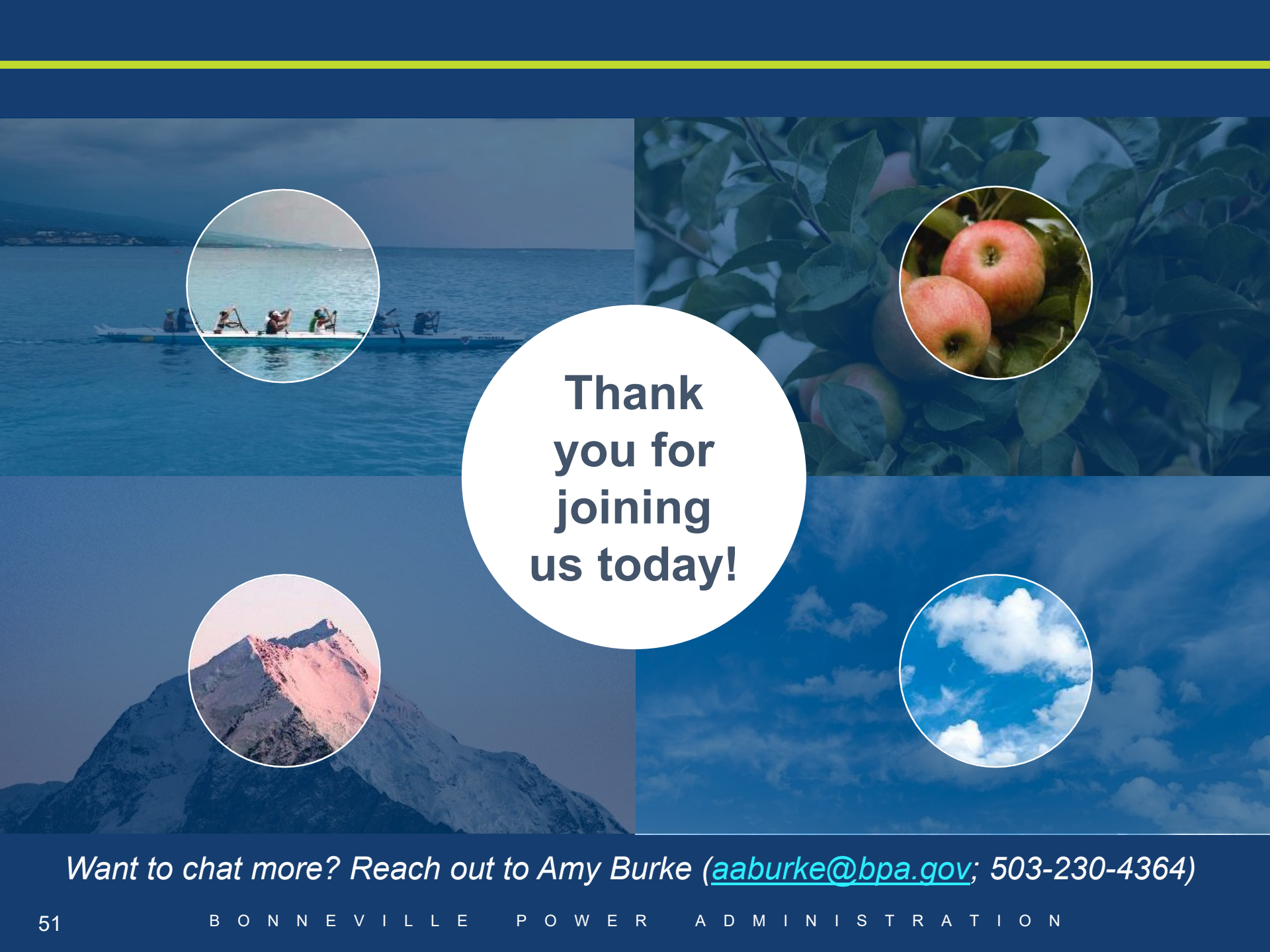
**Low-Income
Program Name:
Opinion Poll**

The image features a scenic landscape with a body of water, mountains, and tall grass in the foreground. A white text box is overlaid on the right side of the image, containing the text "Open Roundtable Discussion" in a teal color. The background is a soft-focus view of a lake or river, with mountains in the distance and tall grass in the foreground. The sky is a pale blue, and the overall lighting suggests a warm, golden hour setting.

**Open
Roundtable
Discussion**

A scenic landscape featuring a body of water in the middle ground, with mountains in the background under a clear sky. In the foreground, there are tall, thin grasses. The image is partially obscured by a white rectangular box containing text and a dark blue background on the right side.

Next Steps & Closing Remarks



**Thank
you for
joining
us today!**

Want to chat more? Reach out to Amy Burke (aaburke@bpa.gov; 503-230-4364)