

LOW INCOME ENERGY EFFICIENCY PROGRAM OVERVIEW

Background

BPA's low income program began in the mid-80s, serving the states of Oregon, Montana, Idaho, and Washington. Over time the program expanded beyond the "Low Income Weatherization Program" and is now called the "Low Income Energy Efficiency Program" (LIEE). In addition to weatherization, the program now offers some efficient appliances, heating systems, and compact florescent bulbs. Originally, the entire budget was distributed to the state programs. However in 1999, in an effort to assure that tribes were receiving an appropriate share of the services, BPA began withholding a small portion of the budget for the "Tribal Set Aside" program. These funds are distributed directly from BPA to tribes residing in BPA's service territory.

Budget

The budget for the LIEE program is set by the BPA Administrator through the IPR process and is implemented through the Energy Efficiency group. It is completely separate from the Energy Efficiency Implementation budget designated to BPA's public utilities' for acquiring savings towards the Council's target.

The total budget for the FY 2014 LIEE program is \$5.15 million. \$4.6 million is distributed in BPA's territory across the states of Oregon, Idaho, Montana, and Washington. The remaining \$515,000 is directly distributed from BPA to tribes residing in BPA's service territory. Individual state budgets are based on the amount of low income persons residing in that state, as determined by census. The budgets are as follows:

Budget	FY 2014	FY 2015
State Grand Total	\$4,639,500.00	\$4,726,800.00
Tribe Grand Total	\$ 515,500.00	\$ 525,200.00
Grand Total	\$5,155,000.00	\$5,252,000.00

State	FY 2014 Budget	FY 2015 Budget
WA Budget at 47.3%	\$ 2,192,164	\$ 2,233,413
OR Budget at 31.6%	\$ 1,465,154	\$ 1,492,723
MT Budget at 8.4%	\$ 388,326	\$ 395,633
ID Budget 12.80%	\$ 593,856	\$ 605,030
Total	\$ 4,639,500	\$ 4,726,800

Tribal budgets are determined by funding applications submitted annually by the tribes. Applications include information such as the amount of eligible participants in the tribe, how much funding the tribe is receiving from other sources, level of weatherization program experience, and the success the tribe has had with their energy efficiency program in the past. Due to the limited amount of funds available, many tribes do not receive the entire amount requested but may re-apply in subsequent years.

Grants

The LIEE grants follow very closely to the Department of Energy's (DOE) grants. In fact, BPA's grants generally request that recipients follow the DOE grants exactly, with the exception of a few allowances that were designed to compliment DOE'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 structural repairs.
- BPA allows CFLs, microwaves, and Energy Star clothes washers 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 can be done on a home, nor a time lapse requirement in between work conducted on a home
- Homes must be in BPA territory, and when weatherized, homes must be electrically heated

The tribal and state grants are almost identical, with the exception that the states are required to spend no less than 3% of their BPA budgets on tribal residents.

Implementation

The money is contractually obligated to the states and tribes via grants, and then invoiced to BPA as the work is completed.

State LIEE program

The states sub-contract with community action agencies (CAAs) who conduct the weatherization installations. CAAs are usually assigned by county. CAAs receive funding from several agencies, and are constantly combining and leveraging funding to complete work on low income housing.

Tribal LIEE program

The tribal program is directly managed by BPA, and involves a significant amount of direct work and relationship building between BPA and the tribes. This allows for BPA to assist the tribes in developing their programs, as well as act as a liaison between the tribes, CAAs, and sometimes the state agencies. Additionally, BPA hosts a bi-annual workshop and gathering of all the participating tribes which allows for tribes to collaborate with each other, keep current with trainings and DOE's weatherization programs, and also assists BPA with contract oversight.

Tribal programs vary greatly, depending on how developed the program is, and how long it has been established. While some tribes have a fully executed program with certified staff and a high number of homes weatherized annually, other tribes are just developing their programs and utilize the grants for trainings, and conducting outreach into the community. Tribes also sometimes subcontract out weatherization work to CAA's who already have established programs and certified field staff.

Oversight and Verification

BPA grants follow the DOE Weatherization Assistance Program guidelines for weatherizing homes. These guidelines require a certified auditor and inspector to review each house and determine what measures are to be installed. All measures must be determined to be cost effective (as defined in the DOE guidelines) for each individual home¹.

BPA does not audit recipients of the LIEE grant (although we reserve the right to at any time), however the majority of CAAs (and residents) that receive BPA funding also receive DOE funding. DOE requires a minimum percentage of homes to be audited and inspected, which results in BPA's state grant recipients having well established oversight, training and monitoring programs, and for BPA homes to be inspected as part of DOE's oversight requirements.

Reporting

States

The states are required to provide quarterly and annual reports to BPA within 90 days of the completion of the cycle. The reports include number of units (homes) served, as well as appliances installed.

Demographic information is also provided, including the number of children, elderly, and tribal members served.

¹ The DOE cost effective guidelines are separate and different than the Regional Technical Forum guidelines used by BPA's utilities for determining cost effectiveness.

Tribes

The tribes are required to provide annual reports, which include similar information as the state reports, and also include the addresses and names of the tribal members served. Additionally, the invoice templates required of the tribes include the number of homes weatherized per invoice period, as well as the percent spent on administration and training.

Program Tracking

BPA tracks the number of units (homes) served by the state programs, and converts them to an estimated first-year kWh savings. BPA is currently in the process of adjusting the state reporting requirements so that it is better aligned with DOE's reporting requirements. This will allow for better tracking of savings, easier reporting for the states, and will reduce the risk of double counting homes served by both DOE and BPA. Because of the limited budget and size of the tribal program, BPA does not document the savings from the tribal program.