



# Low-Income Energy Efficiency Quick Start Guide

Developed by members of the Regional Low-income Energy Efficiency Workgroup

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## ABBREVIATIONS AND ACRONYMS

BPA	Bonneville Power Administration
CAA	Community Action Agency
CAP	Community Action Partnership
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
EEl	Energy Efficiency Incentive
IM	Implementation Manual (BPA)
LIEE	Low-income Energy Efficiency
LIHEAP	Low-Income Home Energy Assistance Program
Manual	The Bonneville Power Administration Energy Efficiency Implementation Manual
USDOE/ DOE	U.S. Department of Energy/ Department of Energy
WX	Weatherization

## 1. INTRODUCTION

Bonneville Power Administration (BPA), public utilities, Community Action Agencies and other interested parties formed the Low-income Energy Efficiency Workgroup (LIEE Workgroup) following BPA's Post-2011 Review. The group continues to meet quarterly. The LIEE Workgroup provides an opportunity for participants to share history, background, and procedures with each other. BPA Staff provide facilitation.

This document is intended to help participants learn the history, background, and procedures for serving low-income customers. This Quick Start Guide was developed using information that has been gathered and shared in the LIEE Workgroup meetings with additional components deemed necessary to “stitch together” the information in a comprehensive manner. It is not a product of BPA, however for questions or concerns about the contents, readers can contact BPA staff or individual authors that are named in the materials.

For more information about the workgroup go here: <https://www.bpa.gov/EE/Policy/Pages/Low-Income-Efficiency.aspx> .

**Members of LIEE Workgroup have provided materials that are incorporated into this Quick Start Guide. The provided materials are attached as Exhibits and Appendices and are referenced in the text.**

## **2. GENERAL INFORMATION ABOUT PARTICIPANTS INVOLVED**

BPA, public utilities, and many other organizations work together to meet energy efficiency targets established by the Northwest Power and Conservation Council. Much of this work is funded by ratepayers through utility programs. Community Action Agencies (CAA) directly contribute to and implement energy efficiency programs in the Northwest in hard-to-reach households, such as low-income households. Much of this work is paid for with grant funds directly from USDOE and indirectly from BPA through Community Action Agencies who receive grant funding from the state other funding comes directly from utilities. Utilities and CAAs work closely together to stretch every dollar.

### **2.1 Bonneville Power Administration**

The Bonneville Power Administration, 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 consumers and businesses in Washington, Oregon, Idaho, Western Montana and parts of California, Nevada, Utah and Wyoming.<sup>1</sup> BPA delivers power via more than 15,000 circuit miles of lines and 259 substations to 490 transmission customers. In all, BPA markets about a 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 Northwest.

#### **2.1.1 BPA Energy Efficiency Program**

BPA pursues energy efficiency as a resource in accordance with the 1980 Pacific Northwest Electric Power Planning and Conservation Act. The Energy Conservation Agreement (ECA) is the contractual mechanism for BPA to meet these statutory obligations. The ECA, the Energy Efficiency Implementation Manual (IM) and BPA's energy efficiency reporting system provide the implementation requirements for measures reported to BPA. BPA commits to achieving the share of the Council's Power Plan regional efficiency target that represents the load of BPA's public power customers. The Manual covers programmatic savings that are reportable to BPA's targets.

BPA has a responsibility to ensure the cost-effectiveness of its energy savings achievements per the Northwest Power Act, and maintains a cost-effective energy efficiency portfolio with an aggregate benefit-to-cost ratio greater than or equal to 1. Each energy efficiency measure contains documentation requirements which are outlined in the IM. BPA Energy Efficiency funds projects in the agricultural, commercial, federal, industrial and residential sectors. Low-income efficiency projects are funded through the residential sector. BPA's Utility Customers determine which sectors, projects, and measures best meet their utility needs and efficiency budget, and offer the selected measures to their customers.<sup>2</sup> Utility Customers that operate low-income weatherization programs may do so themselves, through an

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<sup>1</sup> Maps of BPA service territories are *available at* <https://www.bpa.gov/news/pubs/pages/maps.aspx>

<sup>2</sup> More information on how BPA and Utility Customers fund energy efficiency is available in "funding" section of the BPA Implementation Manual *available at* <https://www.bpa.gov/EE/Policy/IManual/Pages/default.aspx>

implementation firm, or Community Action Agency, but must retain responsibility for and control over the program.

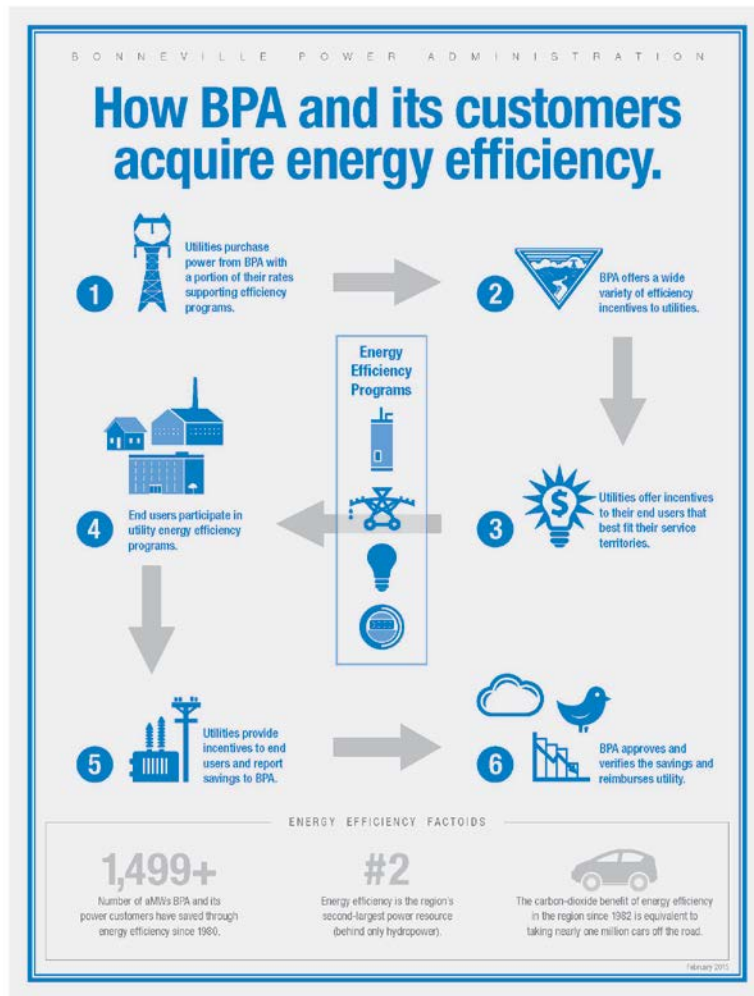


Figure 1. How BPA and Its Customers Acquire Energy Efficiency

BPA allows customers to report costs directly attributable to the installation of low-income energy efficiency measures as eligible for dollar-for-dollar payment. This includes any cost incurred for meeting requirements and specifications (e.g. verification of income, attic and crawl space ventilation, removal of knob & tube wiring, underfloor moisture barriers).

Customers may also report costs related to repair work directly associated with the installation of the measure that is required for health and safety or to ensure the efficacy of the measure (e.g. replace rotting wood in window frame, repair hole in roof). Repair costs must be documented on contractor invoices and reported separately.

Customers may combine funding sources within a residence, but may not combine funding from multiple BPA sources for the same measures.

## 2.1.2 BPA Low-Income Energy Efficiency Grant Program

BPA's low-income program began in the mid-1980s, serving the states of Oregon, Montana, Idaho, and Washington, which cover most of BPA's service area. 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 energy efficient lighting. Originally, the entire budget was distributed to the state programs. However in 1999, in an effort to ensure 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.

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 LIEE program is approximately \$5.25 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 LIEE grants follow the U.S. Department of Energy's (USDOE) Weatherization Assistance Program<sup>3</sup> very closely. 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 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 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

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

BPA grants follow the USDOE Weatherization Assistance Program guidelines for weatherizing homes. These guidelines require a certified auditor and inspector to review each house and determine what

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<sup>3</sup> More information about the USDOE Weatherization Assistance Program is available at <http://energy.gov/eere/wipo/weatherization-assistance-program>

measures are to be installed. All measures must be determined to be cost effective (as defined in the DOE guidelines) for each individual home.<sup>4</sup>

BPA does not directly 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.

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.

## **2.2 Community Action Agencies**

Community Action Agencies are nonprofit, private and public organizations established under the Economic Opportunity Act of 1964 to fight America's War on Poverty. Community Action Agencies help people to help themselves in achieving self-sufficiency. Today there are approximately 1000 Community Action Agencies, serving the poor in every state as well as Puerto Rico and the Trust Territories. The following information is taken from Community Action Partnership.<sup>5</sup>

The service areas of Community Action Agencies cover 96 percent of the nation's counties. Our agencies are connected by a national network that includes the Community Action Partnership national association, regional associations, state associations, a national lobbying organization, and a national association of Community Service Block Grant administrators.

CAAs are a primary source of direct support for the more than 34.5 million people who live in poverty in the United States. The majority of CAA program participants are extremely poor, with incomes below 75 percent of the federal poverty threshold, or \$9,735 for a family of three (the average family size for the client population).

Nationally, the Community Action network serves more than 16.2 million individuals and 3 million families per year. CAAs serve all regions and populations:

- 54% of CAAs serve rural areas.
- 36% of CAAs serve areas considered both urban and rural.
- 10% of CAAs serve urban areas.

The average population a CAA serves is approximately 300,000 people. The average number of low-income people within each service area is 37,600.

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<sup>4</sup> The DOE cost effective guidelines are separate and different than the Regional Technical Forum guidelines used by BPA's utilities for determining cost effectiveness.

<sup>5</sup> [http://www.communityactionpartnership.com/index.php?option=com\\_content&task=view&id=21&Itemid=50](http://www.communityactionpartnership.com/index.php?option=com_content&task=view&id=21&Itemid=50), accessed, March 24, 2016.



Because each CAA is governed locally, each provides a different mix of programs and services including:

<b>Community Coordination</b>	Citizen participation, neighborhood and community organization, information and referrals
<b>Emergency Services</b>	Food Pantries, energy assistance homeless shelters, domestic violence
<b>Education</b>	Head Start, youth mentoring ,literacy, Adult Basic Education
<b>Food and Nutrition</b>	Meals on Wheels, congregate feeding, food banks
<b>Family Development</b>	Day care, case management, counseling, support
<b>Training/Employment</b>	Job readiness, job training, and job creation
<b>Income Management and Budget Counseling</b>	
<b>Transportation</b>	Rural transportation systems, on-demand transportation
<b>Housing</b>	Self-help housing, homeownership, rental assistance, Weatherization
<b>Economic Development</b>	Business planning and loans, water and sewer
<b>Health Care</b>	Health Clinics, WIC, prescription assistance

### 2.3 Public Utilities in the Northwest

There are approximately 135 public utilities in the Northwest. Most of these utilities receive electricity from Bonneville Power to meet their power needs. Public utilities take various forms in the Northwest including rural electric coops, public utility districts, and municipal electric utilities. Each public utility that purchases power from Bonneville receives an Energy Efficiency Incentive (EEI) budget. Utilities have discretion over which UES measures that are implemented in their service territory are reported to Bonneville and whether or not they reimburse end users or CAAs for those savings. Many utilities use their EEI budget and additional utility budget to fund low-income energy efficiency.

### 2.4 Contact List of Community Action Agencies and Utilities

The following tables provide current contact information for Community Action Agencies and utilities. Numbers, website addresses and utility or CAA territories and staff may change and this list may be easily out of date. Utilities may ask their BPA energy efficiency representative or the State and Tribal Grant Fund Coordinator for assistance finding current contact information.

**Table 1. Contact information for Idaho Community Action Agencies and Utilities**

CAA	CAP PHONE	CAP WEBSITE	UTILITY	UTILITY PHONE	UTILITY WEBSITE
South Central Community Action Partnership – (SCCAP)	(208) 733-9351	www.sccap-id.org	Burley, City of	(208) 878-2538	<a href="http://burleyidaho.org/">http://burleyidaho.org/</a>
			Declo, City of	(208) 654-2124	
			East End Mutual Electric	(208) 436-9357	
			Farmers Electric	(208) 436-6384	<a href="http://www.farmersrec.com/">http://www.farmersrec.com/</a>
			Heyburn, City	(208) 679-8158	<a href="http://heyburn.id.gov/">http://heyburn.id.gov/</a>
			Minidoka, City of	(208) 531-4101	<a href="http://www.minidoka.id.us/">http://www.minidoka.id.us/</a>
			Raft River Electric	(208) 645-2211	<a href="http://www.rrelectric.com/">http://www.rrelectric.com/</a>
			Riverside Electric	(208) 436-3855	
			Rupert, City of	(208) 436-9600	<a href="http://www.rupert-idaho.com/">http://www.rupert-idaho.com/</a>
			South Side Electric	(208) 654-2313	
			United Electric Coop	(208) 679-2222	<a href="http://www.unitedelectric.coop/">http://www.unitedelectric.coop/</a>
Southeastern Idaho Community Action Agency – (SEICAA)	(208) 232-1114	www.seicaa.org	Soda Springs, City of	(208) 547-2600	<a href="http://www.sodaspringsid.com/">http://www.sodaspringsid.com/</a>
Eastern Idaho Community Action Partnership- (EICAP)	(208) 522 5391	www.eicap.org	Fall River Electric Coop	(208) 652-7431	<a href="http://www.fallriverpropane.com/">http://www.fallriverpropane.com/</a>
			Idaho Falls, City of	(208) 612-8430	<a href="http://www.idahofallsidaho.gov/">http://www.idahofallsidaho.gov/</a>
			Lost River Electric Coop	(208) 588-3311	<a href="http://www.lostriverelectriccoopinc.com">http://www.lostriverelectriccoopinc.com</a>
			Salmon River Electric Coop	(208) 879-2283	<a href="http://www.srec.org/">http://www.srec.org/</a>
Community Action Partnership – CAP	(208) 746-3351	www.cap4action.org	Bonnors Ferry, City of	(208) 267-3105	<a href="http://www.bonnorsferry.id.gov/">http://www.bonnorsferry.id.gov/</a>
			Clearwater Power	(208) 743-1501	<a href="http://clearwaterpower.com/">http://clearwaterpower.com/</a>
			Idaho County Power &	(208) 983-1610	<a href="http://www.iclp.coop/">http://www.iclp.coop/</a>
			Inland Power & Light Co	(509) 747-7151	<a href="https://www.inlandpower.com/">https://www.inlandpower.com/</a>
			Kootenai Electric Coop	(208) 765-1200	<a href="http://www.kec.com/">http://www.kec.com/</a>
			Northern Lights	(208) 263-5141	<a href="http://www.nli.coop/">http://www.nli.coop/</a>
			Plummer, City of	(208) 686-1641	<a href="http://www.cityofplummer.org/">http://www.cityofplummer.org/</a>
CCOA – Aging, Weatherization, and Human Services	(208) 459-0063	www.ccoaidaho.org	Weiser, City of	(208) 414-1965	<a href="http://cityofweiser.net/">http://cityofweiser.net/</a>
El Ada Community Action Partnership – (EL-ADA)	(208) 377-0700	www.eladacapa.org	Duck Valley	(775) 763-6040	<a href="http://www.rrelectric.com/">http://www.rrelectric.com/</a>

**Table 2. Contact information for Montana Community Action Agencies and Utilities**

CAA	CAP PHONE	CAP WEBSITE	UTILITY	UTILITY PHONE	UTILITY WEBSITE
Human Resource Development Council District XI	(406) 728-3710	www.humanresourcecouncil.org	Missoula Electric Ravalli County	(406) 541-4433 (406) 961-3001	http://missoulaelectric.com/ http://www.ravallielectric.com/
Human Resource Council District XII	406-533-6855	www.hrc12.org	Vigilante Electric	(406) 683-2327	http://www.vec.coop/
Northwest Montana Human Resource Council	(406) 752-6565	www.capnm.net	Flathead Electric Troy, City of	(406) 751-4483 (406) 295-4540	http://www.flatheadelectric.com http://www.cityoftroymontana.com/
			Lincoln Electric	(406) 889-3301	http://www.lincolnelectric.coop/
			Mission Valley	(406) 883-7900	http://missionvalleypower.org/
			Northern Lights	(208) 263-5141	http://www.nli.coop/
Opportunities, Inc LIEAP in Pondera County	(406) 761-0310	www.gfoppinc.org	Glacier Electric	(406) 873-5566	http://www.glacierelectric.com/
Salish and Kootenai Tribes	(406) 657-4491	www.skha.org	Mission Valley	(406) 883-7900	http://missionvalleypower.org/

**Table 3. Contact information for Oregon Community Action Agencies and Utilities**

CAA	CAP PHONE	CAP WEBSITE	UTILITY	UTILITY PHONE	UTILITY WEBSITE
ACCESS	(541) 779-6691	www.accesshelps.org	City of Ashland	(541) 488-5357	http://www.ashland.or.us/
Community Action	(503) 648-6646	www.caowash.org	West Oregon Electric McMinnville	(503) 429-3021 (503) 472-6158	http://www.westoregon.org/ http://www.ci.mcminnville.or.u
Community Action Program of East Central Oregon	(800) 752-1139	www.capecoworks.org	Hermiston Energy Services Columbia Power Cooperative City of Milton-Freewater Columbia Rural Umatilla Electric Columbia Basin Electric	(541) 289-2000 (541) 934-2311 (541) 938-5531 (509) 382-2578 (541) 567-6414 (541) 676-9146	http://www.hermiston.or.us/energy-services
Community Action Team, Inc.	(503) 397-3511	www.cat-team.org	Tillamook PUD Columbia River PUD West Oregon Electric Clatskanie PUD	(503) 842-2535 (503) 397-1844 (503) 429-3021 (503) 728-2163	http://www.tpod.org/ http://www.crpud.net/ http://www.westoregon.org/ http://www.clatskaniepod.com/
Clackamas County Social Services (CCSS)	(503) 655-8640	www.co.clackamas.or.us	Canby Utility Board	(503) 266-1156	http://www.canbyutility.org/
NeighborImpact	(541) 323-6502	www.neighborimpact.org	Mid State Electric Harney Electric Central Electric Coop Columbia Power Cooperative Wasco Electric	(541) 536-2126 (541) 573-2061 (541) 548-2144 (541) 934-2311 (541) 296-2740	http://www.midstateelectric.coop/ http://www.harneyelectric.org/ https://www.cec.coop/ http://www.wascoelectric.com/
Community Services Consortium (CSC)	(541) 928-6335	www.communityservices.us	Consumers Power Central Lincoln PUD	(541) 929-3124 (541) 265-3211	http://www.cpi.coop/ http://clpod.org/
Lane County Human Services Commission	(541) 682-3798	www.co.lane.or.us	Emerald Peoples Lane Electric EWEB Blachly-Lane Springfield Utility Board Consumers Power Central Lincoln PUD	(541) 746-1583 (541) 484-1151 (541) 685-7000 (541) 688-8711 (541) 746-8451 (541) 929-3124 (541) 265-3211	http://www.epud.org/ http://laneelectric.com/ http://www.eweb.org/ http://www.blachlylane.coop/ http://www.subutil.com/ http://www.cpi.coop/ http://clpod.org/
Mid-Columbia CAC (MCCAC)	(541) 298-5131	www.mccac.com	Northern Wasco County PUD Hood River Electric Wasco Electric City of Cascade Locks	(541) 298-2226 (541) 354-1233 (541) 296-2740 (541) 374-8484	http://www.nwasco.com/ http://www.hrec.coop/ http://www.wascoelectric.com/ http://www.cascade-locks.or.us/
Community Action	(503) 585-	www.mwvcaa.org	Salem Electric	(503) 362-3601	https://www.salemelectric.com/

Agency (MWVCAA)	6232				
			Consumers Power	(541) 929-3124	<a href="http://www.cpi.coop/">http://www.cpi.coop/</a>
			Monmouth	(503) 838-0722	<a href="http://www.ci.monmouth.or.us/">http://www.ci.monmouth.or.us/</a>
Oregon Coast Community Action (ORCCA)	(541) 435-7080	<a href="http://www.orca.us">www.orca.us</a>	Central Lincoln PUD	(541) 265-3211	<a href="http://clpud.org/">http://clpud.org/</a>
			City of Bandon	(541) 347-2437	<a href="http://www.cityofbandon.org/">http://www.cityofbandon.org/</a>
			Coos-Curry Electric	(541) 332-3931	<a href="http://www.ccec.coop/">http://www.ccec.coop/</a>
United Community Action Network (UCAN)	(541) 672-3421	<a href="http://www.ucanap.org">www.ucanap.org</a>	Central Lincoln PUD	(541) 265-3211	<a href="http://clpud.org/">http://clpud.org/</a>
			Coos-Curry Electric	(541) 332-3931	<a href="http://www.ccec.coop/">http://www.ccec.coop/</a>
			Douglas Electric	(541) 673-6616	<a href="http://dougselectric.com/">http://dougselectric.com/</a>
Community in Action (CINA)	(541) 889-1060	<a href="http://www.communityinaction.info/weatherization.html">www.communityinaction.info/weatherization.html</a>	Oregon Trail Electric	(541) 523-3616	<a href="http://www.otecc.com/">http://www.otecc.com/</a>
			Harney Electric	(541) 573-2061	<a href="http://www.harneyelectric.org/">http://www.harneyelectric.org/</a>
Oregon Human Development Corporation (OHDC)	(503) 452-6661	<a href="http://www.ohdc.org">www.ohdc.org</a>	Midstate Electric	(541) 536-2126	<a href="http://www.midstateelectric.coop/">http://www.midstateelectric.coop/</a>
			Surprise Valley	(530) 233-3511	<a href="http://surprisevalleyelectric.org/">http://surprisevalleyelectric.org/</a>
Community Connection of NE Oregon (CCNO)	(541) 963-3186	<a href="http://www.ccno.org">www.ccno.org</a>	Oregon Trail Electric	(541) 523-3616	<a href="http://www.otecc.com/">http://www.otecc.com/</a>
			Columbia Power	(541) 934-2311	
			Clearwater	(208) 743-1501	<a href="http://clearwaterpower.com/">http://clearwaterpower.com/</a>
Yamhill Community Action Partnership (YCAP)	(503) 472-0457	<a href="http://www.yamhillcap.org">www.yamhillcap.org</a>	West Oregon Electric	(503) 429-3021	<a href="http://www.westoregon.org/">http://www.westoregon.org/</a>
			McMinnville Water & Light	(503) 472-6158	<a href="http://www.mc-power.com">www.mc-power.com</a>

**Table 4. Contact information for Washington Community Action Agencies and Utilities**

CAA	CAP PHONE	CAP WEBSITE	UTILITY	UTILITY PHONE	UTILITY WEBSITE
Benton-Franklin Community Action Committee	(509) 545-4042	www.bfcac.org	Benton Co PUD #1	(509) 582-2175	http://www.bentonpud.org/
			Benton REA	(509) 786-2913	https://www.bentonrea.org/
			Big Bend Electric	(509) 659-1700	http://www.bbrec.org/
			Franklin County PUD	(509) 542-5910	https://www.franklinpud.com/
			Richland, City of	(509) 942-7402	https://www.ci.richland.wa.us/
Blue Mountain Action Council	(509) 529-4980	www.bmacww.org	Columbia Rural Elec	(509) 382-2578	http://www.columbiarea.com/
Clark County Department of Community Services	(360) 397-2075	www.clark.wa.gov/commser/index.html	Clark Public Utilities	(360) 992-3000	http://www.clarkpublicutilities.com/
Coastal Community Action Program	(360) 533-5100	www.coastalcap.org	Grays Harbor Co PUD	(360) 532-4220	https://www.ghpud.org/
			Pacific Co PUD #2	(360) 942-2411	http://www.pacificpud.org/
HopeSource	(509) 925-1448	www.hopesource.us	Kittitas Co PUD #1	(509) 933-7200	http://www.kittitaspud.com/
			Ellensburg, City of	(509) 962-7226	http://www.ci.ellensburg.wa.us/
CAC of Lewis, Mason and Thurston Counties	(360) 438-1100	www.caclmt.org	Centralia, City of	(360) 330-7671	http://www.cityofcentralia.com/
			Lewis Co PUD	(360) 748-9261	http://www.lcpud.org/
			Mason PUD #1	(360) 877-5249	http://mason-pud1.org/
			Mason PUD #3	(360) 426-8255	http://www.masonpud3.org/
Lower Columbia CAP	(360) 425-3430	www.lowercolumbiacap.org	Cowlitz Co PUD	(360) 423-2210	https://www.cowlitzpud.org/
			Wahkiakum Co PUD	(360) 795-3266	http://www.wahkiakumpud.org/
Metropolitan Development Council (MDC)	(253) 383-3921	www.mdc-tacoma.org	Tacoma Public Utilities	(253) 502-8000	http://www.mytpu.org/tacomapower/
Rural Resources Community Action	(509) 684-8421	www.ruralresources.org	Chewelah, City of	(509) 935-8311	http://www.cityofchewelah.org/
			Inland Power & Light	(509) 747-7151	https://www.inlandpower.com/
			Ferry Co PUD	(509) 775-3325	http://fcpud.com/
			Pend Oreille Co PUD	(509) 447-3137	http://popud.org/
OIC of Washington	(509) 248-6751	www.yvoic.org	Grant Co PUD	(509) 766-2505	http://www.grantpud.org/
			Big Bend Electric	(509) 659-1700	http://www.bbrec.org/
Okanogan County Community Action Council	(509) 422-4041	www.occac.com	Okanogan Co Elect Coop	(509) 996-2228	http://okanoganelectriccoop.com/
			Okanogan Co PUD #1	(509) 422-8485	https://www.okanoganpud.org/

Olympic Community Action Programs	(360) 385-2571	www.olycap.org	Clallam Co PUD	(360) 452-9771	https://www.clallampud.net/save-money/
			Port Angeles City Light	(360) 417-4700	https://wa-portangeles.civicplus.com/
			Mason Co PUD #1	(360) 877-5249	http://mason-pud1.org/
Opportunity Council	(360) 734-5121	www.oppco.org	Blaine, City of	(360) 332-8820	http://www.ci.blaine.wa.us/
			Orcas Is P&L Coop	(360) 376-3500	http://www.opalco.com/
			Snohomish Co PUD	(425) 783-1000	http://www.snopud.com/
Pierce County Community Connections	(253) 798-7205	www.co.pierce.wa.us	Alder Mutual Light	(360) 569-2718	
			Eatonville P&L	(360) 832-3361	http://www.eatonville-wa.gov/
			Elmhurst Mutual P&L	(253) 531-4646	http://www.elmhurstmutual.org/
			Lakeview L&P	(253) 584-6060	http://lakeviewlight.com/
			Lewis Co PUD	(360) 748-9261	http://www.lcpud.org/
			Milton, Town of	(253) 922-8738	http://www.cityofmilton.net/
			Ohop Mutual Light	(253) 847-4363	http://ohop.coop/
			Peninsula Light	(253) 857-5950	http://www.penlight.org/
			Steilacoom , Town of	(253) 581-1912	http://www.townofsteilacoom.co
			Tacoma Public Utilities	(253) 502-8000	http://www.mytpu.org/tacomapo
Spokane Neighborhood Action Partners (SNAP)	(509) 456-7111	www.snapwa.org	Cheney, City of	(509) 498-9230	http://www.cityofcheney.org/
			Inland Power & Light	(509) 747-7151	https://www.inlandpower.com/
			Modern Electric Water	(509) 928-4540	http://mewco.com/
			Vera Water & Power	(509) 924-3800	http://www.verawaterandpower.c
Snohomish County Human Services	(425) 388-7207	www.snoco.org	Snohomish Co PUD	(425) 783-1000	http://www.snopud.com/
Washington-Gorge Action Programs	(509) 493-2662	www.wgap.ws	Klickitat Co PUD	(509) 773-5891	http://www.klickitatpud.com/
			Skamania Co PUD	(509) 427-5126	http://www.skamaniapud.com/
Community Action Center	(509) 334-9147	www.cacwhitman.com	Inland Power & Light	(509) 747-7151	https://www.inlandpower.com/
			Benton Rural Electric	(509) 786-2913	https://www.bentonrea.org/
OIC of Washington	(509) 248-6751	www.yvoic.org	Benton REA	(509) 786-2913	https://www.bentonrea.org/
City of Seattle Office of Housing - HomeWise Program	(206) 684-0354	www.seattle.gov/housing/homewise/	Seattle City Light	206.684.3000	http://www.seattle.gov/light/contactus/
Community Action Partnership – CAP	(208) 798-4187	www.cap4action.org	Clearwater Power	(208) 743-1501	http://clearwaterpower.com/
King County Housing Authority	(206) 574-1100	www.kcha.org/wr/weatherization/	Seattle City Light	206.684.3000	http://www.seattle.gov/light/contactus/
			Tanner Electric Coop	(425) 888-0623	http://www.tannerelectric.coop/
Yakima Valley Farm Workers Clinic	(509) 865-7630	www.ncactopp.org	Yakama Power	(509) 865-7697	http://www.yakamapower.com/about-us/

## **2.5 State Program Information**

Exhibits One through Four provide a state-by-state overview of the programs offered in Idaho, Montana, Oregon, and Washington and any differences in income qualification that the state may exercise. Each state provided a summary.



## Exhibit 1. Idaho Community Action Partnership Electric Utility WX Programs

	BPA Grant Program	BPA EEI Pooling Group Partnership	LIHEAP Weatherization	DOE Weatherization Assistance Program
<b>Program Overview</b>	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 budget for the EEI partnership program is determined by the Idaho Energy Authority (IDEA) pooling group; funding allocations are determined based on 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.	LIHEAP is a block grant program to States, Territories, and Tribes <ul style="list-style-type: none"> <li>Funds provide heating and cooling assistance to low-income families</li> <li>Idaho uses up to 25% of its LIHEAP funds for weatherization</li> </ul>	The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) was created in 1976 to assist low-income families who lacked resources to invest in energy efficiency. Funds are used to improve the energy efficiency of low-income homes.
<b>Income Qualifications</b>	<ul style="list-style-type: none"> <li>To be eligible for an Idaho weatherization assistance program, a household's income <b>must be at or below 200%</b> of Federal Poverty Level. These income levels are based on household income and household size.</li> <li>Priority is given to seniors (60 years of age and older), people with disabilities, households with children under the age of six, high residential energy users (i.e. energy usage is above average as a result of household composition or unusual needs for energy as defined by the sub-grantee), and households with a high energy burden (i.e. when 11.6 percent or more of the household income is utilized to pay for energy costs).</li> </ul>			
<b>Program Description</b>	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 complement DOE's program and allow for more flexibility; <ul style="list-style-type: none"> <li>BPA allows a higher percentage of the grant budget to be used on health and safety, and weatherization-related structural repairs.</li> <li>BPA allows CFLs, microwaves, and Energy Star clothes washers to be installed with minimal Requirements</li> </ul>	This program utilizes the BPA Implementation Manual as the primary guidance and aligns with most Department of Energy installation standards. Currently, Idaho utilizes the EA4.6 energy audit application to provide information to IDEA on each dwelling completed for reporting purposes. The energy audit displays the measures provided and the savings to investment ratio (SIR) per measure.	LIHEAP is the most flexible WX grant in the Community Action portfolio. The funds can be used on most energy conservation measures. Additionally, portions of the funds can be used to treat a home for health and safety repairs, before WX occurs using other grants sources.	Provides 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.
<b>Program Funding</b>	Approximately \$579,000 in PY 2015	Approximately \$50,000 in PY 2015	Approximately \$5.4 million in PY 2015	Approximately \$1.5 million in PY 2015

## Exhibit 2. Montana Weatherization Program

MONTANA WEATHERIZATION PROGRAM				
<p><b>Montana Program Summary</b></p> <p>The Weatherization program provides cost effective energy conservation measures to low-income households. The Montana program is operated statewide by ten private non-profit Human Resource Development Councils and one tribal government.</p>	<p><b>BPA</b></p> <p>Provides funds to the Recipient, in areas served by Bonneville Power Administration (BPA) Utility Customers, to increase energy efficiency of dwellings owned or occupied by eligible low-income persons.</p>	<p><b>Northwestern Energy Low-Income Weatherization and Fuel Switching</b></p> <p>A Universal System Benefits Charge (USBC) collected from all electric and natural gas distribution customers of Northwestern Energy funds the Program. The Program facilitates the investment of Universal System Benefits (USB) funds in the homes of income-qualified electric and natural gas distribution customers of NORTHWESTERN ENERGY. Conservation and energy efficiency investments made through the Program are guided by the Administrative Rules of Montana and Montana Public Service Commission.</p>	<p><b>LIHEAP Weatherization</b></p> <p>LIHEAP is a block grant program providing funds to states, territories and tribes for heating and cooling assistance to low-income families. The grant allows 15% of its fund to be utilized for low-cost weatherization. (Montana utilizes 15% of its LIHEAP funds for weatherization)</p>	<p><b>DOE Weatherization Assistance Program</b></p> <p>The Department of Energy's (DOE) Weatherization Assistance Program (WAP) was created in 1976 to assist low-income families to improve the energy efficiency of their homes.</p>
<p>Specific conservation measures are applied to dwellings if the values of projected energy cost savings exceed all costs associated with their installation. Measures are subjected to a cost test to ensure that energy savings associated with measures performed exceed the cost of purchasing and installing them</p> <p>Measures most commonly performed include heating system tune-ups, air infiltration reduction and attic, wall and floor insulation. The average labor and materials cost per home weatherized for FFY 2015 was approximately \$4,439.</p> <p>The Montana computerized Energy Audit prioritizes energy conservation measures based on the interaction of factors including heating system efficiency, fuel costs, local climactic conditions, and the heat retention characteristics if the respective materials it be utilized.</p> <p>The program has reduced the annual energy costs of recipient households by an average of approximately 46 percent.</p>				
Income Qualifications				
<p>To be eligible for weatherization services in Montana the applicant's household income must be at or below 200% of the Federal Poverty Guidelines based on the size of household or be categorically eligible for assistance under the Low-income Energy Assistance (LIEAP) program. Montana uses a combined application process in which all households approved for LIEAP are also eligible for Weatherization.</p>				
Program Summary				
<p>Specific conservation measures are applied to dwellings if the value of projected energy cost savings exceed all costs associated with their installation. Measures are subjected to a cost test to ensure that energy savings associated with measures performed exceed the cost of purchasing and installing them.</p>				
<p>-Re-weatherization</p> <p>-Health &amp; Safety expenditure limits</p> <p>- Weatherization-related repairs</p>	<p>-No limit on time from most recent weatherization date</p> <p>-30% of total dwelling cost</p> <p>-May not exceed 30% of total dwelling cost</p>	<p>-Must not have been weatherized within the last ten years</p> <p>-15% of program operations</p> <p>-Follows DOE rules</p>	<p>-Must not have been weatherized within the last ten years</p> <p>-Mostly follows DOE rules</p>	<p>-The home has not been weatherized since September 30, 1994 with funds from DOE.</p> <p>-15% of program operations</p>
Funding				
FY 2016	\$401,961	\$4,455,647	\$4,306,223	\$2,346,361
ML 03232016				
For More Information Contact : Marcia Lemon - Energy & Community Services Manager -DPHHS/IHSB-mlemon@mt.gov (406) 447-4276				

### Exhibit 3. Oregon Community Action Partnership

	BPA Grant Program	Energy Conservation Helping Oregonians	LIHEAP Weatherization	DOE Weatherization Assistance Program
<i>Program Overview</i>	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 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.	LIHEAP is a block grant program to States, Territories, and Tribes <ul style="list-style-type: none"> <li>Funds provide heating and cooling assistance to low- income families</li> <li>Oregon uses 15% of its LIHEAP funds for low-cost weatherization</li> </ul>	The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) was created in 1976 to assist low-income families who lacked resources to invest in energy efficiency. Funds are used to improve the energy efficiency of low-income homes.
Income Qualifications				
<ul style="list-style-type: none"> <li>To be eligible for an Oregon weatherization assistance program, a household's income must be at or below 200% of Federal Poverty Level. These income levels are based on household income and household size.</li> <li>Priority is given to seniors (60 years of age and older), people with disabilities, households with children under the age of six, high residential energy users (i.e. energy usage is above average as a result of household composition or unusual needs for energy as defined by the sub-grantee), and households with a high energy burden (i.e. when 11.6 percent or more of the household income is going towards energy).</li> </ul>				
<i>Program Description</i>	<p>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 complement DOE's program and allow for more flexibility;</p> <ul style="list-style-type: none"> <li>BPA allows a higher percentage of the grant budget to be used on health and safety, and weatherization related structural repairs.</li> <li>BPA allows CFLs, microwaves, and Energy Star clothes washers to be installed with minimal Requirements</li> <li>Allows for 30% of the grant to be spent on health and safety</li> </ul>	<p>ECHO used its own program guidelines, separate from DOE &amp; BPA. The grant pays for full cost wx, as long as the measures meet cost-effective standards deemed by an state approved audit tool. Currently, Oregon uses REM/rate. After specific measures meet the REM audit analyses, contractors provide the wx and Community Action provides quality control and inspection services.</p> <ul style="list-style-type: none"> <li>15% of the funds can be used for health and safety</li> </ul>	<p>LIHEAP is the most flexible wx grant in the community action portfolio. The funds can be used on most energy conservation measures. Additionally, portions of the funds can be used to treat a home for health and safety repairs, before wx occurs using other grant sources.</p>	<p>Provides conservation services, health and safety repairs, heating system repair and replacement, base-load measures and energy education to households. Ceiling, wall, and floor insulation;</p> <ul style="list-style-type: none"> <li>Energy-related minor home repairs</li> <li>Energy education</li> <li>Air infiltration reduction;</li> <li>Furnace repair and replacement</li> <li>Heating duct improvements</li> </ul>
<i>Program Funding</i>	Oregon: 1.5 million	Approximately 9 million/year	Approximately 5 million/year	2.2 million/2015

For More information Contact:  
 Keith Kueny, Energy Policy and Program Coordinator, Community Action Partnership of Oregon (CAPO)  
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 350 Mission SE, Suite 201Salem, OR 97302

**Exhibit 4. Department of Commerce (Washington Energy Programs)**



# Department of Commerce

	<b>BPA Grant Program</b>	<b>DOE Weatherization Assistance Program</b>	<b>LIHEAP Weatherization</b>	<b>Matchmakers Program</b>
<i>Program Overview</i>	BPA Administrator sets the budget for the Low-Income Energy Efficiency (LIEE) grant program through the Integrated Program Review (IPR) process. LIEE comes from BPA’s Public Purpose funding, is not part of Energy Efficiency’s acquisition budget, and is considered non-federal. LIEE funds are distributed to four states (ID, OR, MT, WA).	The U.S. Department of Energy’s (DOE) Weatherization Assistance Program (WAP) provides grants to states, territories, and some Indian tribes to improve the energy efficiency of the homes of low-income families while ensuring health and safety.	LIHEAP is a block grant program to States, Territories, and Tribes. Funds provide heating and cooling assistance to low-income families. Washington uses 15-25% of its LIHEAP funds for low-income LIHEAP Weatherization (LPW).	The Matchmakers Program (MM) 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.
<i>Program Description</i>	<p>BPA’s LIEE grants operate mostly under DOE WAP rules.</p> <p>BPA/DOE differences:</p> <ul style="list-style-type: none"> <li>• % Admin</li> <li>• % Health &amp; Safety</li> <li>• % Wx Related Repair</li> <li>• % EE Education</li> <li>• Dwelling Cost per Unit</li> <li>• Microwaves</li> <li>• Energy Star clothes washers</li> <li>• Ductless Heat Pumps</li> <li>• Re-weatherization</li> </ul> <p>Eligible applicant’s home must reside in BPA’s public utility territory. Home must be electrically heated except for non-baseload measures.</p>	DOE’s WAP program provides the foundation for WA State’s low-income energy efficiency programs. Energy efficiency measures must meet a Saving-to-Investment ratio of 1.0 or greater prior to installation as determined by a priority list or energy audit. Prior to providing weatherization services, certain energy-related health and safety hazards must be eliminated.	<p>WA State’s LPW operates mostly under DOE WAP rules.</p> <p>LPW/DOE differences:</p> <ul style="list-style-type: none"> <li>• % Admin</li> <li>• % Health &amp; Safety</li> <li>• Dwelling Cost per Unit.</li> <li>• Re-weatherization</li> </ul> <p>WA State applies for the LIHEAP Waiver on an annual basis. The waiver allows WA State to transfer up to an additional 10% of the available LIHEAP Energy Assistance Program to Weatherization.</p>	The primary purpose of the MM Program is to increase the energy efficiency, habitability, and durability of low-income residences by attracting leveraged funding sources. Secondary purposes include energy efficient service provider cooperation, efficient and effective delivery of weatherization services, and employment. The MM Program is administered to maximize the greatest benefits to the low-income residents of WA state. Recent legislation has allowed MM Program funds to be used for healthy homes improvements.
<i>Health &amp; Safety</i>	Up to 30% of program budget	Up to 14.7% of program budget	Up to 25% of program budget	Up to \$10,000 Total IMC* per unit
<i>Wx Related Repair</i>	Up to 30% of program budget	Up to 15% of program budget	Up to 15% of program budget	Up to \$10,000 Total IMC* per unit
<i>Annual Program Funding</i>	Washington: \$2.27 million	Approximately \$4.33 million/year	Approximately \$9.4 million/year	\$7.5 million/year
<i>Income Qualifications</i>	<ul style="list-style-type: none"> <li>• To be eligible for WA State’s Weatherization Assistance Program, a household’s income must not exceed 200% of Federal Poverty Level or 60 percent of state median income, whichever is greater. These income levels are based on household income and household size.</li> <li>• Priority is given to seniors (60 years of age and older), people with disabilities, households with children, high residential energy burden/users, and Native Americans.</li> </ul>			

\*Total Installed Measure Cost (IMC) = Wx Measure Costs + H&S Measures Costs + WRR Measures Costs

For more information contact: Hans Berg, Weatherization Program Manager: Hans.berg@commerce.wa.gov 360-725-2961

### 3. CASE STUDIES

**Exhibits Five through Seven** provide real world case studies that demonstrate how low-income energy efficiency happens in the region from an implementer's perspective. There are many other stories to share. Here are just a few examples:

#### Exhibit 5. Cowlitz PUD and Lower Columbia Community Action Agency Case Study: a low-income weatherization Partnership

The Lower Columbia Community Action Agency (LCCAA), located in Longview, Washington has been in a partnership with its public utility, Cowlitz PUD, since 1982. The Energy Project, which represents the community action agencies throughout Washington State, initiated a strategic planning meeting with the LCCAA Executive Director in 2011. The focus of the meeting was to determine local agency goals in expanding their low-income weatherization program by leveraging BPA energy efficiency funds that were allocated to Cowlitz PUD for overall conservation implementation, and an accompanying action plan of next steps.

Soon after, the LCCAA approached the management of the PUD to explore partnership opportunities. Initially, there was an informal arrangement to work together and LCCAA and the PUD slowly moved forward using some BPA EEI funds for residential energy audits. The PUD wanted to assess whether the LCCAA could successfully spend funds that met the BPA EE 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 Low-income Home Energy Assistance Program weatherization dollars; the U.S. Department of Energy Weatherization Assistance Program funds; the WA State funded Energy Matchmakers; the BPA low-income grant program (via WA Dept. Commerce), and the BPA energy efficiency incentive funds via Cowlitz PUD. In the 2013-15 funding cycle of WA Energy Matchmakers, \$563,265 was sponsored by Cowlitz PUD using BPA EE 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 are as solid as ever.

LCCAA provides a home energy audit, oversees subcontractors for the weatherization work, and does 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 and proposed that we utilize the \$3,800 for ductless heat pumps as the majority of this housing stock could greatly benefit. Other opportunities included improved communication between organizations and amongst the various local stakeholders and through community efforts that may one day provide economic development opportunities. Future opportunities that the PUD has observed include 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.

*Personnel interviewed for this case study were:*

*Ilona Kerby, Executive Director of LCCAA  
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*Deanna Dahlberg, of the Weatherization Program/Fiscal staff  
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deannad@lowercolumbiacap.org*

*David I. Shepherd-Gaw, PMP  
Energy Efficiency Manager  
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Shawn Collins  
Director  
The Energy Project  
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cell: (360) 389-2410

## Exhibit 6. BPA, Utility & Community Action: Collaboration Stories from Oregon

### Overview

Consumer owned utilities and Community Action Agencies have a history of collaboration to provide full-home weatherization to struggling Oregonians. Community Action Agencies in Oregon invest more than \$20,000,000 every year in low-income and vulnerable homes, which provides significant leverage opportunities for local utilities looking to make a difference in their community. Already happening, many utilities are taking advantage of these funding streams to improve customer relations and decrease load.

### HACSA, EWEB, SUB, EPUD, CLPUD (Eugene/Springfield)

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

*"I knew that I had to get the EEI partnerships back on line. 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 that CAPs have trouble paying for with their other grants funds. Mobile home roof caps and crisis heating systems are great examples."*

*"After a couple conversations with Central Lincoln PUD (CLPUD) I realized they were open to a broad range of low-income projects. I am headed over to Florence to survey the energy needs of three public housing complexes to see if there is a project that would meet CLPUD's needs. CLPUD's service area has been in a housing boon for some time. At the same time the homeless population has also boomed. Vacation and retirement houses are displacing low-income housing. The service industry population is increasingly living in travel trailers on public forest land. Energy upgrades to the existing low-income complexes could be wise community investment of CLPUD's EEI funds."*

#### **Submitted by:**

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## Community Action Team (St. Helens)

Casey Mitchell, the weatherization manager for Community Action Team (CAT), began attending the low-income work group meetings last year. Casey has a history of braiding multiple funding streams together to weatherize and improve living conditions for households in need. Using LIHEAP (Low-income Housing and Energy Assistance Program) funds to repair housing conditions and USDOE Weatherization Assistance Program funds for energy efficiency upgrades, Casey was able to leverage significant resources for his local utility.

Below is an account from Casey on how the incentive program is helping utility customers:

*“The CAT weatherization program and our clients have greatly benefited from the work group meetings that have been going on for the last year. We have a stronger understanding of the BPA program and how we as an agency can better partner with our local PUD's. 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 to 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 to complete the work. Cyrus Collins who works for Columbia River PUD is a highly skilled energy specialist, who was interested in completing the Quality Control Inspector certification (which is required for CAAs who are utilizing DOE and BPA grant funding). We (CAT) proposed to CRPUD 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.”*

Cyrus Collins agreed with Casey and added:

*“I have found the sessions good as well. I think that there are a lot of opportunities for utilities and CAPs to work closely together but there are a lot of administrative hurdles. Once we started working more closely with CAT and I started getting more involved with their audits/inspections I also got a glimpse into other areas that have crossover, such as CATs Rehab Loan program through the USDA. I see the workgroup as a great place to bridge gaps in communication between CAPs, utilities and BPA”.*

### Submitted by:

Keith Kueny  
Energy Policy and Program  
Coordinator  
Community Action  
Partnership of Oregon  
(CAPO)  
(503) 991-9327  
keith@caporegon.org  
350 Mission SE, Suite  
201Salem, OR 97302

### CAA Contact:

Casey Mitchell  
W/X Coordinator and Single  
Family Housing Director  
Community Action Team Inc  
503-366-6550

### Utility Contact

Cyrus Collins  
Energy Specialist  
Direct 503.366.6508  
Department 503.366.5470  
Fax 503.397.5215  
ccollins@crpud.org



## **CAPECO, Columbia Power Cooperative and Columbia Basin Electric Cooperative**

Donna Kinnaman is the CEO of Community Action Program of East Central Oregon (CAPECO). She runs a weatherization program herself and knows what is needed for these programs to succeed. She has been attending the low-income workgroup meetings since their inception. Donna has forged new partnerships through the work group that have led to several more homes being fully weatherized in the area.

Boyd Wilson is an energy efficiency representative with BPA. Together he and Donna visited two rural utilities, Columbia Power Cooperative and Columbia Basin Electric Cooperative to discuss how their organizations might work together more closely. They met with the General Manager and other relevant staff. BPA outlined the low-income weatherization program identified in the BPA Energy Efficiency Implementation Manual (IM). CAPECO illustrated the benefit for both organizations of working together and how collaboration could expand CAPECO's ability to weatherize more homes and customers by leveraging federal and utility funds.

This approach allows for serving both eligible households on CAPECO's waiting list and referrals from the utility. CAPECO relays information about potential homes that are eligible for weatherization measures in accordance with BPA's residential program's low-income measure offerings. The utility completes an initial drive by assessment, confirms the primary source of heat is electricity, and informs CAPECO of which homes they will fund (this allows the utility to maintain control of their funding). CAPECO then establishes the audit of the dwelling and enters critical information into the state of Oregon's federally approved audit software and determines the measures to be installed. Next, CAPECO issues a work order to one of their certified contractors and upon completion, inspects 100% of the work. With direction from BPA, a simple reporting form was created with fields for the necessary information as outlined in BPA's Implementation Manual (IM). The billing form and other requested information is submitted to the utility for payment. Lastly, if the audit supports additional weatherization measures beyond those identified as reportable to BPA, the agency utilizes other funds to install these measures.

2015 was a very successful year. Thanks to CAPECO, Columbia Power and Columbia Basin Electric venturing into a partnership, funding was leveraged and allowed for six additional homes to be weatherized.

### **Submitted by:**

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### **CAA Contact:**

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dkinnaman@capeco-  
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ext. 113  
  
Eric Shaw, Wx Manager  
eshaw@capecoworks.org  
541-276-1926 ext 120

### **Utility Contacts:**

Paul Rich  
Columbia Basin Elec. Coop  
(503) 718-3734  
paul@esgroupllc.com  
  
Troy Cox  
Columbia Power  
541-934-2311  
troycox@centurytel.net

## Exhibit 7. Tacoma Power Low-Income



### Low-Income

#### 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 1980's 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.

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.

## Our Past Success

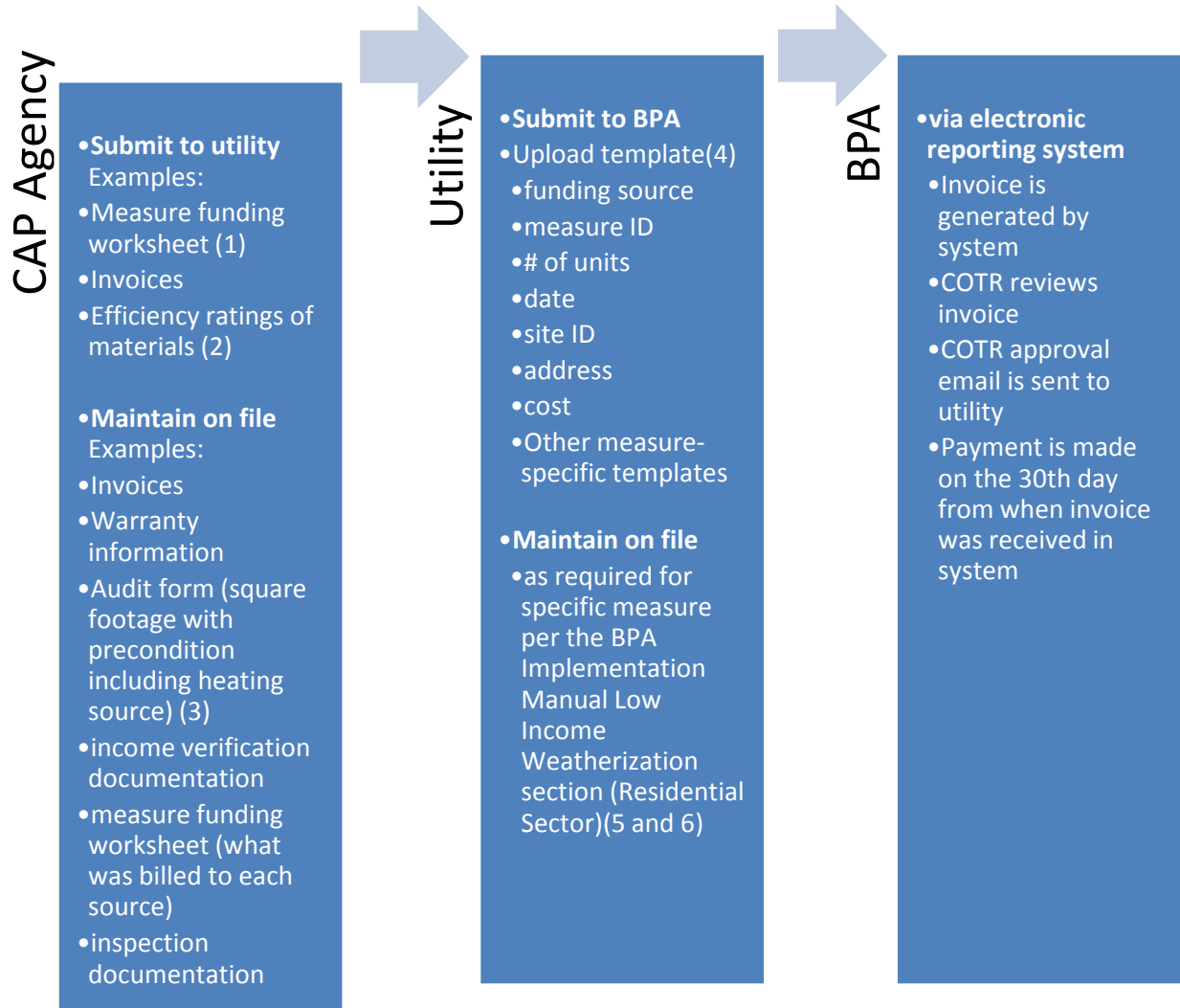
Year	Single Family Projects	Multifamily Projects	DHP Projects	Total Spent
2011	305	30	0	\$2,064,000
2012	272	56	114	\$3,263,900
2013	347	38	200	\$3,412,500
2014	209	13	248	\$2,121,300
2015	135	135	236	\$2,065,800

## For questions contact

Jeremy Stewart – Tacoma Power  
253.393.3294  
jstewart@cityoftacoma.org

#### 4. TIPS FOR REPORTING TO BPA

Community Action Agencies, Utilities and BPA must each document and retain different information as part of the weatherization process. The following table documents their typical responsibilities for each organization, however many organizations choose to collect and retain additional or alternate information.



Appendix 1 Measure Funding Worksheet, Certificate of Product Ratings and COTR IS2 Invoice and Oversight File Reviews which can be found at the end of this document, provide sample documentation retained by Community Action Agencies, Utilities and BPA.

## **5. STARTING A RELATIONSHIP WITH THE CAA OR UTILITY**

Some Community Action Agencies and utilities are just beginning to discuss potential partnerships within their service territory. This section provides helpful tip sheets for both CAAs and utilities that are starting relationships with their serving CAA/utility. These were provided by actual CAAs and utilities. Idaho Energy Authority has provided a sample contract that they used with their serving CAA. (Exhibit 9). Utilities may choose to carve out a certain amount of the EEI or other funds to promise to the CAA if they can implement LIEE in their service territory. The utility may stipulate a specific timeframe in which the funds must be used in order to align with their own planning horizons including the BPA rate periods, which are two years (16-17, etc.). The contract may enumerate which measures the utility will or will not fund and this may be due to limitations put on them by their own board or the BPA Energy Efficiency offering, which can be found in the Implementation Manual ([www.bpa.gov/EE/Policy/IManual](http://www.bpa.gov/EE/Policy/IManual)).

The following four Appendices, which can be found at the end of this document, provide examples of strategies for beginning relationships, program processes, and contracts:

Tips for CAPs When Speaking to Utilities - Appendix 2.

Tips for Utilities When Speaking to CAPs – Appendix 3.

Idaho Falls Power Low-income Program Process, Creating a Partnership and Program Participation - Appendix 3.

Contract Agreement between Idaho Energy Authority (IDEA) and Eastern Idaho Community Action Partnership (EICAP) - Appendix 4.

Cowlitz PUD Low-Income Weatherization Program Agreement - Appendix 5.

## **6. APPENDICES**

**Appendix 1 Measure Funding Worksheet, Certificate of Product Ratings and COTR IS2 Invoice and Oversight File Reviews**

**Appendix 2. Tips for CAPs When Speaking to Utilities**

**Appendix 3. Tips for Utilities When Speaking to CAPs**

**Appendix 4. Idaho Falls Power Low-income Program Process, Creating a Partnership and Program Participation.**

**Appendix 5. Contract Agreement between Idaho Energy Authority (IDEA) and Eastern Idaho Community Action Partnership (EICAP)**

**Appendix 6. Cowlitz PUD Low-Income Weatherization Program Agreement**





# Certificate of Product Ratings

AHRI Certified Reference Number: 6885842

Date: 9/26/2014

Product: Variable Speed Mini-Split Heat Pump, with Remote Outdoor Unit Air-Source, Free Delivery

Outdoor Unit Model Number: RXN12KEVJU5

Indoor Unit Model Number: FTXN12KEVJU5

Manufacturer: DAIKIN AC (AMERICAS), INC.

Trade/Brand name: DAIKIN

Series name:

SCANNED

Manufacturer responsible for the rating of this system combination is DAIKIN AC (AMERICAS), INC.

Rated as follows in accordance with AHRI Standard 210/240-2008 for Unitary Air-Conditioning and Air-Source Heat Pump Equipment and subject to verification of rating accuracy by AHRI-sponsored, independent, third party testing:

Cooling Capacity (Btuh):	12000
EER Rating (Cooling):	9.90
SEER Rating (Cooling):	18.00
Heating Capacity(Btuh) @ 47 F:	13500
Region IV HSPF Rating (Heating):	8.50
Heating Capacity(Btuh) @ 17 F:	8200

CERTIFIED RATINGS FOR VARIABLE-SPEED, MINI- AND MULTI-SPLIT SYSTEMS ARE VALID FOR ALL COMBINATIONS OF INDOOR UNITS (BASED ON COMBINATION TYPES) WITH THE SPECIFIC OUTDOOR UNIT LISTED ABOVE AND IN THE AHRI DIRECTORY OF CERTIFIED EQUIPMENT. VISIT WWW.AHRIDIRECTORY.ORG TO VERIFY THAT THIS COMBINATION IS AN ACTIVE LISTING AND THE DATA LISTED ON THIS CERTIFICATE IS ACCURATE. SEARCH ON THE AHRI REFERENCE # TO QUICKLY LOCATE THIS COMBINATION IN THE DIRECTORY.

\* Ratings followed by an asterisk (\*) indicate a voluntary rerate of previously published data, unless accompanied with a WAS, which indicates an involuntary rerate.

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CERTIFICATE NO.: 130562272170619489

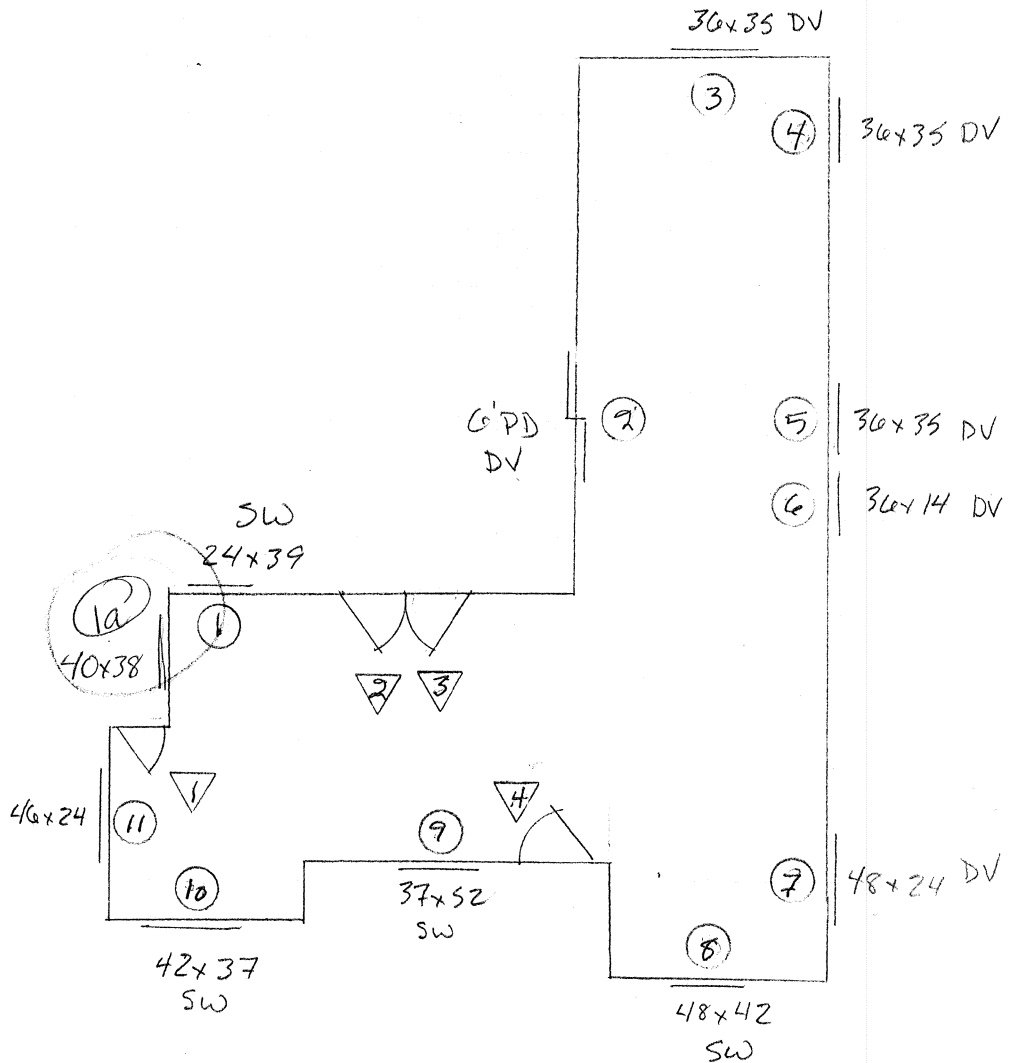
# HACSA

EUGENE 97402

07

AREA	1005	VOLUME	8,640
CURRENT		PROPOSED	
FLOOR	R-25		R-24
WALLS	R-11		
ATTIC	R-11/R-19		R-38/R-19
WDWS	SINGLE WOOD		DOUBLE VINYL
HEAT	SPACE HTRS		DHP/WALL HTRS

NORTH





# COTR IS2 INVOICE AND OVERSIGHT FILE REVIEWS

REQUIRED FOR ALL MEASURES					REQUIRED FOR SOME MEASURES							LOW-INCOME WEATHERIZATION MEASURES		RE
					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 a stock tanks.							(if claiming dollar-for-dollar reimbursement)		
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 low-income measure.	Cost of repair work performed to ensure the efficacy of installed measure.	PTCS accept codes, space	
EI	RWBHO11090	LOO	04/02/2012	NO	554654654654	Example with all info	Test Street	Test	ID	55555	151	101		
EEI	LHVEN10055	400	22-Oct-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	388			
EEI	LHVEN10167	61.37	22-Oct-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	1,227			
EEI	LHVHS12036	1	30-Sep-14	NO	11503		123 NW Irvine	McMinnville	OR	97128	2,900			
9														
10														
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19														

## 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?

# WHAT DO YOU NEED TO KEEP IN YOUR FILES FOR OVERSIGHT?

Documentation Description	Retention/Submittal Locations			
	BPA Energy Efficiency Reporting System	<a href="mailto:eedocs@bpa.gov">eedocs@bpa.gov</a> or fax 1-866-535-7955	Customer File	
End-user identifying information including unique site ID and address	X		X	*On Upload Template - both Unique Site ID and address
Equipment/contractor invoice showing (a) measure requirements have been met (e.g., manufacturer, model number, type, size and quantity of equipment or product installed/used), (b) the order/purchase date and (c) cost of installed measures, and (d) cost of any related repairs			X	*See invoice descriptions below
Description of home type (single-family, multifamily or manufactured)			X	*Only contained in the DHP form, not provided in other documentation.
Insulation (if installed): square feet and pre/post R-value documentation			X	*Invoice from Josh Lowe's showing 400 sq ft of R20 and \$388 total cost of materials and installation. *Invoice from HACSA showing 400 sq ft and pre/post and \$388 *Sketch of house footprint with attic insulation pre/post
Prime window/Patio door: (a) number and square footage of windows or patio doors replaced, (b) pre-condition (frame type/ ie. Wood, metal, single/double pan) and (c) NFRC stickers or other verification of U-values.			X	*Invoice from Cascade Windows showing dimensions of windows, which I calculated out to equal 61.3 sq ft, and \$462.80, and U-values of .30. *Invoice from Josh Lowe's showing \$875 labor to install the six windows on the Cascade invoice. *Invoice from HACSA for \$875 and \$462.80 *Sketch of house footprint with window pre/post
Exterior insulated doors: Documentation of number of doors replaced and pre and post conditions.			X	
Ductless Heat Pumps: DHP Installation form			X	*Invoice from Associated Heating & Air Conditioning with date of \$2,900 cost and Model numbers. *DHP form with install date, model number *AHRI Certificate with date and model number
PTCS/Prescriptive Duct Sealing: PTCS/Prescriptive Duct Sealing form and information entered into the PTCS Site Registry			X	
Form that documents review and approval of: income eligibility using verifiable documentation of household income and number of individuals for the entire household			X	*CAP agency certification of eligibility is adequate, since they have to see the actual documents. (or proof that utility laid eyes on verifiable documentation)

## HOW MUCH IS THE REBATE PAYMENT?

BPA allows customers to report costs directly attributable to the installation of the measure as eligible for dollar-for-dollar payment. This includes any cost incurred for meeting requirements and specifications (e.g. verification of income, attic and crawl space ventilation, removal of knob & tube wiring, underfloor moisture barriers).

Customers may also report costs related to repair work directly associated with the installation of the measure that is required for health and safety or to ensure the efficacy of the measure (e.g. replace rotting wood in window frame, repair hole in roof). Repair costs must be documented on contractor invoices and reported separately.

Home Type	Low Income Qualifying Measure	Installed Measure Cost Payment - dollar for dollar (except as noted)	Repair Cost Payment - dollar for dollar (examples provided)
Single-family	Attic Insulation (up to R49)	Dollar for dollar	<i>Examples include: repair roof leak, re-build external entrance covering, fix hole in siding</i>
	Floor Insulation (up to R30)	Dollar for dollar	
	Wall Insulation (up to R11)	Dollar for dollar	
	Prime Window	Dollar for dollar, not to exceed \$20.00/square foot	<i>Examples include: address dry-rot in window framing, replace rotten threshold, repair cracked header</i>
	Patio Door	Dollar for dollar, not to exceed \$20.00/square foot	
	Exterior Insulated Door	Dollar for dollar, not to exceed \$400.00/door	<i>Examples include: re-frame attic access hatch, repair pull-down stair</i>
	Whole House Air sealing	Dollar for dollar	
	Prescriptive Air Sealing	Dollar for dollar	
	PTCS duct Sealing	Dollar for dollar	<i>Examples include: replace rusted duct work, repair broken filter slot</i>
	Prescriptive Duct Sealing	Dollar for dollar	
Ductless Heat Pump	Dollar for dollar, not to exceed \$3,800.00	<i>Examples include: improve structural support for interior head</i>	
Multifamily	Attic Insulation (up to R49)	Dollar for dollar	<i>Examples include: repair roof leak, re-build external entrance covering, fix hole in siding</i>
	Floor Insulation (up to R30)	Dollar for dollar	
	Wall Insulation (up to R11)	Dollar for dollar	
	Prime Window	Dollar for dollar, not to exceed \$20.00/square foot	<i>Examples include: address dry-rot in window framing, replace rotten threshold, repair cracked header</i>
	Patio Door	Dollar for dollar, not to exceed \$20.00/square foot	
Manufactured	Attic Insulation (up to R30)	Dollar for dollar	<i>Examples include: repair roof leak, re-build external entrance covering</i>
	Floor Insulation (up to R22)	Dollar for dollar	
	Prime Window	Dollar for dollar, not to exceed \$20.00/square foot	<i>Examples include: address dry-rot in window framing, replace rotten threshold, repair cracked header</i>
	Patio Door	Dollar for dollar, not to exceed \$20.00/square foot	
	Exterior Insulated Door	Dollar for dollar, not to exceed \$400.00/door	
	Whole House Air sealing	Dollar for dollar	<i>Examples include: install whole-house ventilation fan</i>
			<i>Examples include: replace rusted duct work, repair broken filter slot</i>
	PTCS Duct Sealing	Dollar for dollar	
Prescriptive Duct Sealing	Dollar for dollar		
Ductless Heat Pump	Dollar for dollar, not to exceed \$3,800.00/DHP	<i>Examples include: improve structural support for interior head</i>	

## Tips for CAPs When Speaking to Utilities

First of all, if you do not already have relationships with a utility, attend a board meeting or two. I wouldn't necessarily give a presentation right away. Introduce yourself and listen to the meeting regardless of the agenda to get a feel for the board's interests. When you talk to the utility or present to a board, sculpt your delivery around the areas where your WAP program aligns with and can facilitate a board's particular interests.

Start by explaining how CAPs assists Low income Americans with a variety of services. Identify yourself as part of the CAP that serves the service area of the utility. Give a quick rundown of the services your CAP provides. I always throw in some form of why I think what we do is a good investment of tax payers dollars.

Focus in on the services provided by your "Energy Unit" (Weatherization and Energy assistance). Cover the entire list of services provided by your program. Include everything from income qualification, energy assistance, heat crisis and energy education to weatherization and more....

Present the goals of your program and the services you are best at providing

Talk about your assets: wait list, grants, staff, and as well as the institutional knowledge, experience and networking you bring to the table.

Ask about the utility's general energy efficiency goals and how they meet them. It is good to give them the time to explain and brag about the whole breadth of their EE program. They are as proud of their programs as you are of your program. Listen and take mental notes on ways your WAP program could help the utility and how what they are already doing could help your program. Use the information as the conversation rolls on.

Ask if they have a low income EEI program. This is a good time to remind the utility that through the WAP regulated application process you have a wait list of "certified" low income clients waiting for energy efficiency services.

Lead the conversation towards the ways utility program goals align with CAP goals. Talk about the strengths and weaknesses of each program and seek out ways the overlap of the two 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 your low income weatherization. On the other hand, you may walk out of the meeting with a new efficient heating system for your Head Start or upgraded lighting for your food bank warehouse. A partnership is a partnership and good partnerships are cultivated and grow.

Always end the meeting recognizing and thanking the utility for their services to the community.

## Tips for Utilities When Speaking to CAPs

Make sure your utility management, board members and/or council members are on board with offer a LI program. Know your limits before you hold a meeting with the CAP.

Make an appointment with the CAP so you can introduce yourself and ask about their programs. Briefly explain your programs and get a feel for a partnership. Find out what funding they have and how yours can be incorporated to leverage their existing program.

If they like the idea of a partnership, then take the time to dive deeper and explain what you need for documentation. Explain that they need certified contractors (AHRI, PTCS, etc.) to run the BPA programs, help them get training if needed. Explain that ductless heat pumps need to have an AHRI certification number and DHP form. If you do appliances you may need to discuss tier ratings. You may need to go into detail about R-value requirements as well.

Find out if they do their own audits or if they use an outside contractor. Let them know if you can or need to provide the audits for them. Our CAP has their own auditors and it works well for us. If they provide auditors, review there audit reports, make sure they provide adequate details explaining the measures clearly. We do 100% inspection.

Be sure they clearly understand the documentation you need to have on file in order to provide the incentives for all measures. Invoices, audit reports, total project costs, repair costs and any other documentation you may require. CAP's most likely keep the data on file already. We have provided our CAP with the IM and BPA's web site for them to review.

If they are interested in a partnership, then work on creating an agreement. Decide on a budget that works for your utility and the current rate period, make sure that dollar amount is provided in the agreement. Explain to CAP any restrictions or concerns you may have. (Example: Our CAP is to let us know if they can't spend the money within six months of the close of our rate period so we can reallocate the funds if needed).

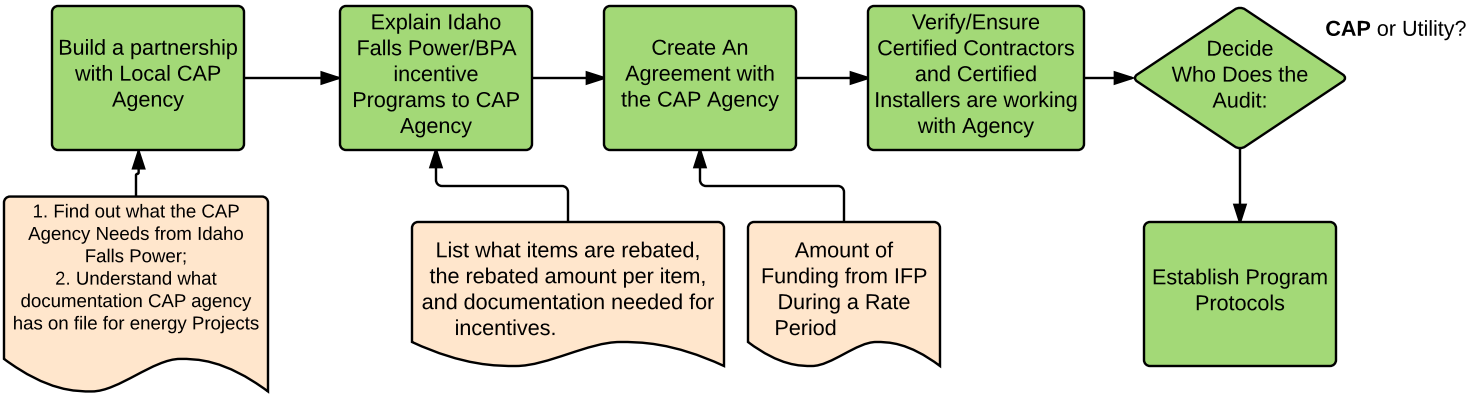
Meet with CAP annually or as needed to make sure everyone is staying focused and has the same objective.

Always stay positive and thank them for their partnership.

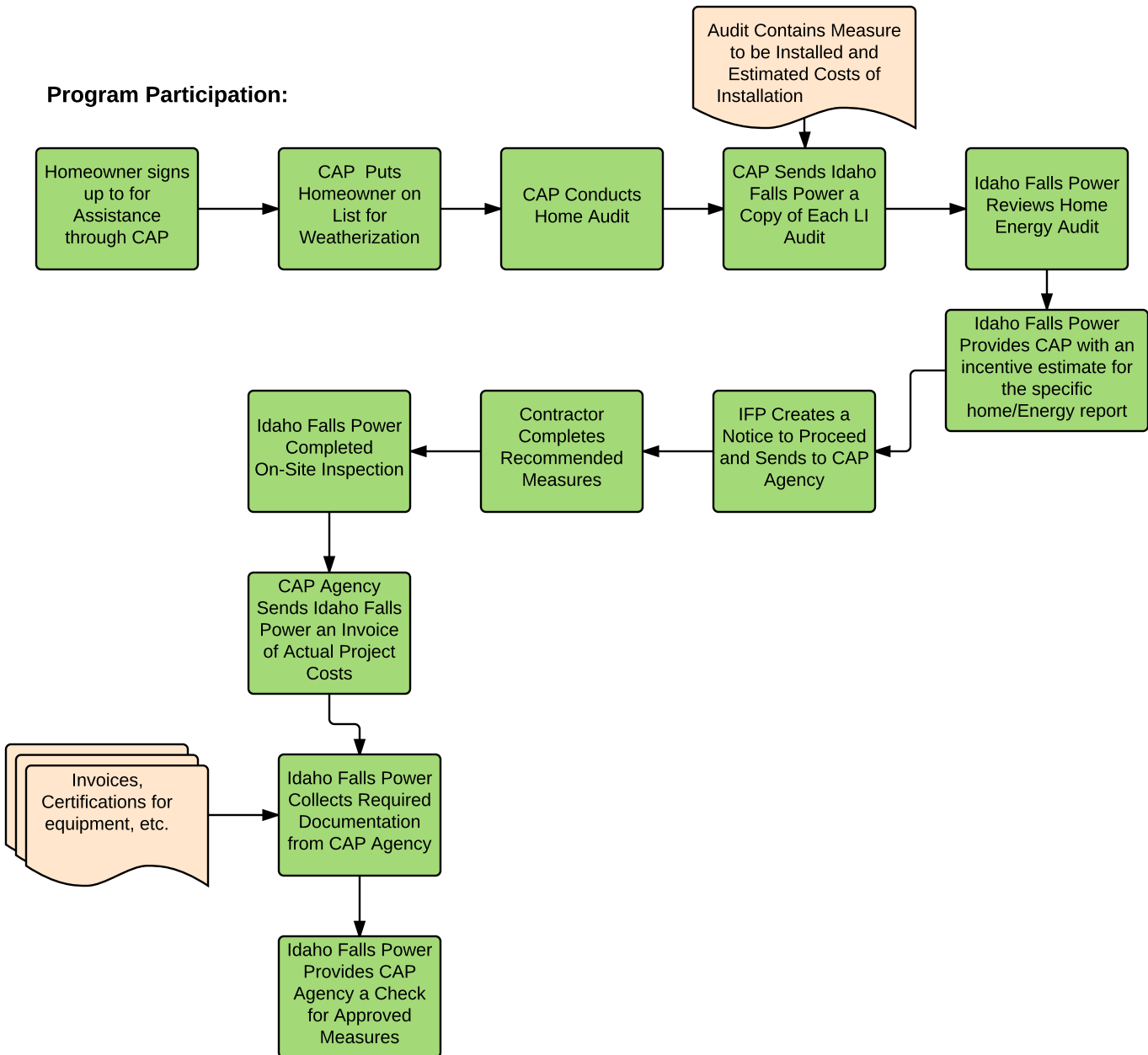
Just a side note; There is a bit of a learning curve for the Utility and the CAP, be patient and work out the details as you move forward. Use your EER, they can be very helpful.

# Idaho Falls Power Low Income Program Processes

## Creating a Partnership:



## Program Participation:



**Contract Agreement  
between  
Idaho Energy Authority (IDEA)  
and  
Eastern Idaho Community Action Partnership (EICAP)**

**1. Effective Date**

The terms of this agreement shall apply to service provided during the time period between October 1, 2015 and September 30, 2017. This Agreement may be renewed by mutual written agreement of the parties.

**2. Services Provided by EICAP**

EICAP (Agency) agrees to perform the services detailed in Exhibit A of this Agreement.

**3. Program**

The Residential Low Income Weatherization Program (Program) is a program run in conjunction with the Bonneville Power Administration (BPA) and IDEA. It is designed to assist with the installation of certain electric energy saving weatherization measures in homes of low income customers residing within the service territories of participating IDEA utilities. All funds will be used to fund installation of BPA qualified measures of low income customers receiving service from participating utilities. The Agency may use other funding to cover measures not covered by the BPA program. Agency will take steps to ensure that only BPA program energy saving measures actually installed will be reported to IDEA.

**4. Promotion and Printed Materials**

All written materials, and the use of the IDEA or participating utility name, designed to describe or promote the program shall be coordinated between AGENCY and IDEA or the participating utility. Any use of IDEA's or a participating utility's logo or name, shall be approved by IDEA.

**5. Confidentiality**

AGENCY will keep all IDEA customer information to which it may gain access to confidential, and use it only for performance of its obligations under this Agreement.

AGENCY shall not release such member information to any third party without written permission from IDEA. AGENCY will treat member information as confidential information and mark as such in its filing system. If AGENCY uses any consultants or subcontractors to perform any of its obligations under this Agreement, they must abide by this same confidentiality provision.

## **6. Payment**

IDEA will pay AGENCY the allowable BPA incentive payment for the measures installed plus 7.5% for AGENCY administrative costs. Prime window replacements will be paid at cost up to the maximum reimbursement rate of \$20 sq. /ft. of glazing. An itemized invoice shall be submitted for payment.

AGENCY is responsible for collecting from the customer any additional funds for work performed that are not covered by the BPA willingness-to-pay provisions. AGENCY is required to review this with the customer, and AGENCY shall acquire prior written acknowledgement from the customer prior to beginning installation of measures.

## **7. Budget**

IDEA will commit \$150,000.00 to reimburse AGENCY for low income weatherization measures installed in participating utilities low income customer homes for the October 1, 2015 – September 30, 2017 Rate period. This includes the cost for AGENCY administration fees.

## **8. Insurance**

Without limiting any liabilities or any other obligations of AGENCY, AGENCY shall prior to commencing work, secure and continuously carry with insurers, and provide evidence of such coverage to IDEA, the following insurance coverage:

Commercial General Liability Insurance with a minimum single limit of \$1,000,000.

Business Automobile Liability Insurance with a minimum single limit of \$1,000,000 for bodily injury and property damage, with respect to AGENCY's vehicle, whether owned, hired or non-owned, assigned to, or used in the performance of the work.

## **9. Workers Compensation**

AGENCY shall comply with all applicable workers compensation acts in the State of Idaho, and shall furnish proof thereof satisfactory to IDEA prior to commencing work.



## **10. Indemnification**

AGENCY specifically and expressly agrees to defend, indemnify and hold harmless IDEA, members of IDEA's Board, officers and agents (collectively INDEMNITEES) against and from any and all losses, claims, demands, suits or costs and damages of every description, including attorney's fees, brought or made against or incurred by any of the INDEMNITIES resulting from, arising out of, or in any way connected with any act, omission, fault, or negligence of AGENCY, its employees, agents or representatives in the performance or nonperformance of AGENCY's obligations under this Agreement, or in any way related to this Agreement.

AGENCY's indemnity obligation under this article shall not extend to any liability caused by the sole negligence of any or the INDEMNITEES.

## **11. Independent Contractor**

AGENCY is an independent contractor, and all persons employed by AGENCY in connection herewith shall be employees of AGENCY, and not employees of IDEA in any respect.

## **12. Entire Agreement**

This Agreement including:

- Exhibit A
- Regional Technical Forum Weatherization Specifications October 1, 2014
- BPA's Implementation Manual (10/1/15)--Residential Section

Attached hereto (which are incorporated herein as part of this agreement), contains the entire understanding between IDEA and AGENCY and supersedes any prior written or oral agreements or understanding, and there are no oral understandings or representations outside this Agreement. This Agreement may be amended or modified by either party upon thirty (30) days written notice from one party or the other. The provisions of Sections 5 through 12 of this Agreement shall survive the termination of this Agreement.

## **13. Termination**

This Agreement shall be in effect until September 30, 2017, but may be renewed by written agreement by both parties. This Agreement may be terminated by either party upon thirty (30) days written notice from one party to the other. The provisions of Section 5 through 12 of this Agreement shall survive the termination of this Agreement.

**14. Assignment**

AGENCY shall not assign this Agreement, or any part hereof, without the prior written consent of IDEA, and any attempted assignment in violation hereof shall be void.

**15. Invalid Provisions**

If any provisions of this Agreement is held to be illegal, invalid, or unenforceable under present or future law, each provision shall be fully severable; this Agreement shall be construed and enforced as if such illegal, invalid, or unenforceable provision had never comprised a part of this Agreement; and the remaining provisions of this Agreement shall remain in full force and effect and shall not be affected by the illegal, invalid, or unenforceable provision, there shall be added automatically as a part of this Agreement a provision as similar in term to such illegal, invalid and unenforceable provision as may be possible and be legal, valid and enforceable.

**16. Participation Utilities**

Idaho Falls Power

**This Agreement is agreed to and accepted by:**

**IDAHO ENERGY AUTHORITY**

**EASTERN IDAHO COMMUNITY  
ACTION PARTNERSHIP (EICAP)**

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date; \_\_\_\_\_

Date: \_\_\_\_\_

## **EXHIBIT A SCOPE OF WORK**

Eastern Idaho Community Action Partnership (AGENCY) will perform the following services related to the Low Income Weatherization Program for the Idaho Energy Authority Pooling Group (IDEA) utilities listed in this agreement.

1. AGENCY shall use IDEA program funds to assist customer households currently receiving electric service from participating IDEA member utilities and use the electricity as the primary heating source.
2. AGENCY will qualify the utility customers for the program using the guidelines provided in the BPA Implementation Manual, including the following guidelines:
  - a. The resident's income does not exceed 200% of poverty as defined by federal guidelines.
  - b. All measures must generate reportable, cost-effective savings in the customer's utility service territory.
  - c. There will be no discrimination among applicants on the basis of race, color, religion or sex.
3. AGENCY will operate within the parameters given in the latest version of the Regional Technical Forum Weatherization Specifications and the BPA Implementation Manual.
4. AGENCY may qualify projects (verifying financial and site requirements) and perform energy audits without prior consent of IDEA. Notification of an energy audit to the utility providing electric service to the residence is preferred whenever possible.
5. Supporting documentation required by the BPA Program will be provided for all invoices sent to IDEA or its representative. AGENCY is not to submit any information to BPA directly.
6. AGENCY is responsible for installing and verifying that all measures are in accordance with local building codes, manufacturer's recommendations and all other applicable guidelines.
7. AGENCY will communicate to the customer that an IDEA representative will also complete a post-installation inspection.
8. AGENCY may perform additional measures that are not covered within the BPA low income guidelines at their discretion. However, IDEA will not pay AGENCY for these measures and AGENCY will be responsible to collect any amount owed for the additional measures from the customer.
9. AGENCY will provide any written materials regarding the program to IDEA for review and acceptance before providing them to customers.

IDEA agrees to work in conjunction with AGENCY as follows:

1. IDEA will process the information received from AGENCY in an expeditious manner and submit reports directly to BPA.
2. IDEA will remit payment to AGENCY through its contracted agent (Utah Associated Municipal Power Systems) UAMPS.



Contract No. OS430

## LOW-INCOME WEATHERIZATION PROGRAM AGREEMENT

**THIS LOW INCOME WEATHERIZATION 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". All services provided pursuant to this Agreement are subject to the terms and conditions set forth hereafter.

**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 weatherization 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 weatherization activities to increase efficiency and reduce duplication.

**NOW THEREFORE**, the Parties agree as follows:

1. **Agency's Duties.** Agency agrees to enter into this Agreement and provide low-income weatherization measures to eligible households receiving electric heating service from the District. Agency agrees to follow the specific terms, conditions and requirements of the District's Residential Weatherization Plus Program (Exhibit A), applicable Northwest Power And Conservation Council's Regional Technical Forum (RTF) Residential Weatherization Specifications (Exhibit B), and Washington State's Department of Commerce Weatherization Manual for Managing the Low-Income Weatherization Program. 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 weatherization work and will perform the following activities:

- A. Verify Cowlitz County residents are income eligible for the District's low-income weatherization program.
- B. Notify the District of residents' eligibility.

- C. Schedule all and conduct necessary audits of residences being considered for weatherization.
  - D. Manage weatherization work, excluding window installation. This includes:
    - a. Issue all work orders and/or purchase authorization orders to applicable contractors for approved weatherization projects.
    - b. Schedule and oversee weatherization work conducted.
  - E. Coordinate and communicate with District regarding window installation work by District-qualified window contractors or contractors as per District's Weatherization Plus Program requirements for all approved weatherization projects.
  - F. Upon completion of work, schedule all necessary inspections including those required by District staff.
  - G. Submit to the District all required documentation for the District to receive incentive reimbursement and/or kilowatt-hour credit from the Bonneville Power Administration, in addition to credit towards the District's requirements under Washington State's I-937 conservation mandate. This documentation includes:
    - a. Name and location of weatherization project with associated Agency identifying number
    - b. Details of weatherization work to include, but not be limited to, dates of work, contractors used, measures implemented, project and/or measure costs.
    - c. District forms must be used for documentation. The forms are subject to change and will be agreed upon between Parties.
  - H. On occasion, the District may request the Agency prepare historical reports on non-District incentivized low-income weatherization projects as per the same documentation instruction in 1.G. of this Agreement and/or Exhibit C. This activity prevents the duplication of effort and related costs between the District and Agency's low-income weatherization programs.
2. **District's Duties.** The District agrees to have Agency act as the lead coordinating organization for the low-income portion of its Residential Weatherization Plus Program. Per this Agreement, the District will perform the following activities:
- A. Provide a list of all eligible weatherization measures and their corresponding rebates/incentives to the Agency.
  - B. Provide Agency all necessary or required forms for proper documentation of weatherization work.
  - C. Be responsive and supportive to Agency's coordination of weatherization work, particularly as it applies to window installation work, and associated post-installation work inspections.
  - D. Issue all approved window installation work orders and/or purchase authorization orders to District qualified window contractors or contractors as per District's Weatherization Plus Program requirements.

E. Perform all post-installation inspection related to the District-supported window installation work.

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

3. **Compensation.** Agency shall submit to the District by the fifteenth (15<sup>th</sup>) day of each month, an invoice for work per square foot at the District rebate or incentive rates established in Attachment A, and up to two (2) hours of staff time at forty dollars (\$40) per hour for each home weatherized to cover administrative and program costs. Upon completion of work, results of final inspection, and submission of all documentation, the District shall remit payment to Agency for said work.

The District may also request historical data from the Agency pertinent to preventing duplicative work, and as such, Agency may submit a request for compensation at fifteen dollars (\$15) per hour.

Periods of performance for compensation and total value shall be noted below, by dates and be provided by the District, through contractual amendments (Exhibit D) to the Agency, for the following periods:

- January 1, 2014 – September 30, 2015
- October 1, 2015 – September 30, 2017

The value of each performance period will be dependent upon BPA EEI allocated dollars available, other District customer preferences and/or changes to state/regional and/or federal codes, standards and laws that may negatively affect weatherization measures, their cost-effectiveness or the implementation thereof. The value is subject to change at any time.

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.

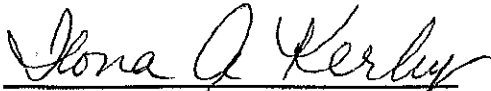
The Parties' duty to indemnify the other Party shall not apply to liability for damages arising out of bodily injury to persons or damage to property caused by or resulting from the sole negligence of the other Party.

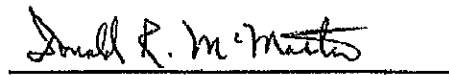
Agency's duty to indemnify the District for liability for damages arising out of bodily injury to persons or damage to property caused by or resulting from the concurrent negligence of (a) District or District agents or employees and (b) Agency or Agency's subcontractors, agents or employees, shall apply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

**The undersigned hereby certify that the waiver herein of the immunity granted by the Washington State Industrial Insurance Act, Title 51 RCW was mutually and specifically negotiated.**

  
Agency – Signature of Authorized Rep.

  
District – Signature of Authorized Rep.

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.

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.

<u>Agency</u>	<u>District</u>
Deanna Dahlberg Lower Columbia CAP 526 Commerce Avenue Longview, WA 98632 360-425-3430 (x-264) deannad@lowercolumbiacap.org	David Shepherd-Gaw Cowlitz PUD 961 12 <sup>th</sup> Avenue/P.O. Box 3007 Longview, WA 98632 360-501-9505 dshepherd-gaw@cowlitzpud.org

10. **Term & Termination.** This Agreement shall be in effect from January 1, 2014 through September 30, 2017. At periodic intervals between state and federal fiscal years, in addition to other requested periods communicated and agreed upon between the Parties, an evaluation of the results of the Program shall take place and said Parties will make appropriate changes as needed.

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. In the event Agency receives a subpoena, other legal process, or any other request, for disclosure of information subject to this confidentiality provision, Agency shall immediately notify the District and shall not disclose the requested information without prior written consent from the District or valid Court order. Agency shall cooperate with the District in connection with any steps the District may take to protect against disclosure of the requested information. 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.



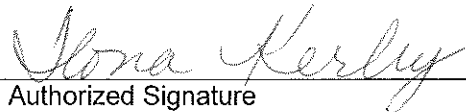
**13. Governing Law and Severability.** This Agreement shall be governed by Washington law. If any term, condition or provision of this Agreement or the application thereof to any circumstance is determined to be invalid or unenforceable to any extent, the remaining provisions of this Agreement shall 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.** This Agreement shall be construed and enforced pursuant to the laws of the State of Washington. Parties shall timely attempt in good faith to resolve any ambiguities or contract disputes arising out of this Agreement. If said good faith attempts fail, the Parties agree that the sole venue and jurisdiction for dispute resolution lies in Cowlitz County Superior Court, Kelso, Washington. In the event of a lawsuit, the substantially prevailing party shall be entitled to reasonable attorneys' fees in connection with such litigation. ,.

**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.

**BY SIGNING BELOW,** the Parties acknowledge agreement with the provisions herein.

**LOWER COLUMBIA COMMUNITY  
ACTION PROGRAM**

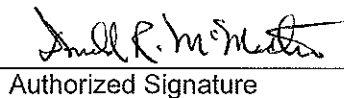
  
Authorized Signature

**Ilona Kerby**  
Printed Name

**Executive Director**  
Title

03/17/15  
Date

**PUBLIC UTILITY DISTRICT NO. 1 OF  
COWLITZ COUNTY, WASHINGTON**

  
Authorized Signature

**Donald R. McMaster**  
Printed Name

**General Manager**  
Title

3/18/15  
Date

**Attachments:**

- Exhibit A – Residential Weatherization Plus Program
- Exhibit B – Regional Technical Forum Measure Installation Specifications
- Exhibit C – Weatherization Project Data Format/Template
- Exhibit D – Amendment Template