

April 2025 Implementation Manual Changes

March 27, 2025



Rate Period and Reporting and General IM Changes

Dave Moody, Deputy Vice President

Advance Notice: IM Publication and Reporting

☐ Effective October 1, 2025

- The term Contracting Officer's Technical Representative (COTR) will be replaced with Contract Administration Specialist (CAS).

☐ Effective October 1, 2027

- Publish an Implementation Manual (IM) update that is inclusive of all changes occurring over the previous two years. This includes changes resulting from the 9th Power Plan, scheduled to be published in 2026.

Advance Notice – Effective October 1, 2025

☐ Non-Sector Chapters

○ 2.1.5 Performance Payments

Definition of Small, Rural, Residential (SRR) customers will change from fewer than 10 customers per mile to fewer than 12 customers per mile.

○ 3.2 Reporting Requirements

- Requiring measures/projects be submitted within 180 calendar days of completion date.
- Requiring invoice for payment within 60 calendar days of BPA approval.
- Requesting and reporting at least once every six months.

○ 4.1 Custom Programs Payment Rate

Increasing Nonresidential Lighting incentive from \$0.13 per kWh to \$0.25 per kWh.

○ 5.1 Custom Programs Payment Rate

Increasing Nonresidential Lighting incentive from \$0.13 per kWh to \$0.25 per kWh .

○ 6.2 Measure Distribution Channels

Expiring the “By Request” measure distribution channel.

Agricultural

David J. Lee, Agricultural and Federal Sector Lead



Clarification



□ 7.3 – Thermostatically Controlled Outlets

○ Basis for Energy Savings and Requirements and Specifications sections

- Improving description of the base case and more efficient case.
 - How the device functions.
 - What the device would control.
- Including a variety of locations where this device could be used.
 - Pump and water system utility building, utility room, or agriculture building (e.g., barn, livestock building, chicken house, storage shed, etc.).
- Removing references to freeze protection.
- Improving the basis for energy savings narrative.

Advance Notice – Effective October 1, 2025

□ Incentive Payments Will Increase 30-40 Percent Overall

As a result of changes made by the Regional Technical Forum and BPA-Qualified (BPA-Qualified) review process, and to align with updated kWh energy savings and inflation adjusted marketplace incremental costs, BPA will update the following measures with increased incentive payments.

- **7.5.1 – Irrigation System Conversion: LESA/LEPA/MDI**
Low Elevation Spray Application/Low Energy Precision Application/Mobile Drip Irrigation
- **7.5.2 – Sprinkler Package Replacement**
- **7.5.3 – Irrigation System Low-Pressure Conversion: High-Pressure to Low-Pressure**
- **7.6.2 – Variable Frequency Drive for Agricultural Centrifugal Pumps (BPA-Qualified)**
- **7.6.3 – Variable Frequency Drive for Agricultural Turbine Pumps (BPA-Qualified)**
- **7.6.4 – Variable Frequency Drive for New Agricultural Pump Installations (BPA-Qualified)**
- **7.6.5 – Agricultural New Pump Efficiency Upgrade (BPA-Qualified)**

Questions?



Commercial

Eric Mullendore, Commercial and Industrial Sector Lead



Calculator Updates

- **8.3.1 Lighting Calculators**
 - **Requirements and Specifications**
 - **A. Lighting Calculator Versions**

Lighting Calculator Series Name	Calculator Version	Effective Date	Lighting Calculator Expiration Date*
Lighting Calculator Series 5	LC5.1	October 1, 2020	March 31, 2024
Lighting Calculator Series 6	LC6.0	October 1, 2023	September 30, 2025
Online Lighting Calculator	OLC	April 1, 2025	TBD

* Expiration date for Lighting Calculator Series 6 indicates the date that all projects must be invoiced in BEETS. As customers transition to using the OLC, they must discontinue all use of Lighting Calculator Series 6.

- **B. Measure Types and Approval Procedures, Nonstandard**
BPA-approval is required for nonstandard measures submitted using Lighting Calculator 6 only.

Calculator Updates

- New cloud-based Online Lighting Calculator, effective April 1, 2025.**
- Updating Online Lighting Calculator with adjustments to payments and calculations, effective October 1, 2025.**

Corrections – Effective April 1, 2025

□ 8.7.6 Variable Frequency Drive for Pumps (BPA-Qualified):

○ Requirements and Specifications

- Adding a third sentence to opening paragraph to clarify multiple pumps may be included in a single submittal with no limit on total variable frequency drive (VFD) horsepower (HP) installed.

○ Pre-conditions

- Correcting third bullet to clarify individual qualifying pump motor HP must be less than or equal to 100 HP.

Advance Notice – Effective October 1, 2025

☐ Requirements Changes

○ 8.3.1 Lighting Calculators

- Projects in Oregon with linear fluorescents or Compact Fluorescent Lamps (CFLs) in the baseline will not be eligible to use the retrofit portion of the calculator.

○ 8.3.2 Midstream Lighting

- Light-Emitting Diode (LED) tube and linear replacement product measures will not be eligible in Oregon.

○ 8.6.2 Efficient Refrigeration Fan Motors

- Removing fan blade size requirement for walk-in fan motors.

Advance Notice – Effective October 1, 2025

□ Requirements Changes, cont'd

○ 8.7.3 Consumer Heat Pump Water Heater in Commercial Applications

Requirements and Specifications: Removing requirement to replace an existing electric-resistance water heater.

- Revising Documentation Requirements table to add alternative invoice documentation and removing “make, model, and installed cost” requirements.

Section	Measure
8.4.4	Air-Source Heat Pump Retrofit and Upgrade
8.4.7	Commercial Packaged Terminal Heat Pump
8.4.8	Demand Controlled Kitchen Ventilation
8.4.9	Heat Recovery Ventilation Equipment
8.7.5	Efficient Pumps
8.7.6	Variable Frequency Drive for Pumps

Advance Notice – Effective October 1, 2025

Measure	Savings	Payments
Midstream Lighting	Increasing for some	No change
Connected Thermostat	Increasing	Increasing for electric heat
Air-Source Heat Pump Retrofit and Upgrade	No change	Increasing for retrofit
Variable Refrigerant Flow System Retrofit	No change	Increasing
Variable Frequency Drive on Air Handler Unit	No change	Increasing
Commercial Packaged Terminal Heat Pumps	Decreasing (61-94%)	Decreasing
Demand Controlled Kitchen Ventilation	No change	Increasing
Heat Recovery Ventilation Equipment	No change	Increasing
Generator Block Heaters	No change	Increasing
Vehicle Engine Block Heater Controls	Increasing	No change
Consumer Heat Pump Water Heater in Commercial Applications	Increasing for most, decreasing for some	Increasing

Advance Notice – Effective October 1, 2025

☐ Measure Consolidation

○ 8.4.2 Connected Thermostat

- Increasing savings for installation measures.
- Expire verification measures.

○ 8.5.1 Commercial Insulation

- Updating savings for Heating Zone 2 to reflect weighted average of Heating Zone 2 and 3.
- Expiring all Heating Zone 3 measures.
- Expire R5-R30 and R5-R49 Attic/Roof measures.

○ 8.5.2 Commercial Windows

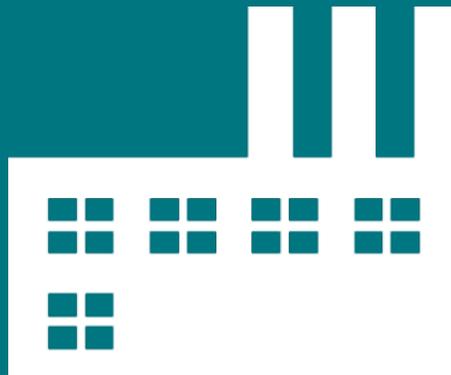
- Updating savings for Heating Zone 2 to reflect weighted average of Heating Zone 2 and 3.
- Expiring all Heating Zone 3 measures.

Questions?



Industrial

Eric Mullendore, Commercial and Industrial Sector Lead



Advance Notice – Effective October 1, 2025

- **10.3.2.1 Strategic Energy Management Legacy**
 - Expiring measure. Note: Multiyear Strategic Energy Management will remain active.

Advanced Notice – Effective October 1, 2025

❑ 10.3.3 Performance Tracking System

- Consolidating two measures (Installation/Setup and Annual Maintenance).

❑ 10.4.1 Variable Frequency Drive for Fans in Potato and Onion Storage Facilities

○ Requirements and Specifications

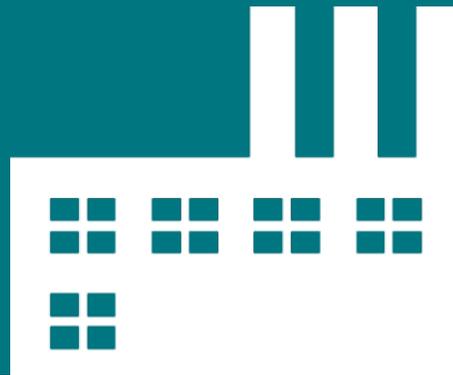
- Adding a maximum HP threshold for qualifying VFD HP (equal to or less than 250 HP).

○ Payment table

- Adding clarification, “To calculate the payment, the customer will add the total fan VFD HP installed on a per-building basis.” Also, returning the Payment table.

Measure Category	Payment Horsepower
Variable Frequency Drive for Fans in Potato and Onion Storage Facilities	\$200

Questions?



Residential

Jonathon Belmont, Residential Sector Lead



Corrections – Effective April 1, 2025

❑ RefNo Corrections

○ 11.5.8 Single Family Duct Sealing

- Correcting Power System Coincident Peak Reduction (kW) and Distribution System Peak Load Reduction (kW).

○ 11.8.1 Manufactured Home Attic Insulation payments

- Correcting (\$/unit).

Requirement Changes – Effective April 1, 2025

□ 11.5.4 Variable-Speed Air-Source Heat Pump Upgrade

- Removing Requirement: “All components of the heat pump, including indoor and outdoor components, must be newly replaced with new components that are Air-Conditioning Heating and Refrigeration Institute (AHRI) -tested and certified, and meet all other measure requirements.”

□ 11.7.3 Single-Family New Construction Performance Path

- Changing measure expiration from September 30, 2026, to September 30, 2028.
- Removing IM text: “NEEA no longer supports this measure.”
 - NEEA will continue to support this measure through sunset date.

Advance Notice – Effective October 1, 2025

☐ Requirements Change

○ Section 11 Residential Sector

- Requiring Installed cost for all Residential measures.

☐ Expiration of Distribution Option: Removing “By Request” measure distribution channel.

- 11.3.1 ENERGY STAR Level 2 Networked Electric Vehicle Chargers
- 11.4.1 Thermostatic Shut-Off Valves (TSV)
- 11.6.3 Advanced Smart Thermostats
- 11.8.7 Door Sweeps

Advance Notice – Effective October 1, 2025

☐ Requirements Changes, cont'd

- **11.4.2 Unitary Heat Pump Water Heater – 40 gallon (BPA-Qualified)**
 - Adding “Allow HPWH in new construction (not available in Oregon or Washington).”
- **11.4.3 Unitary Heat Pump Water Heater – 50 gallon and above**
 - Adding “Allow HPWH in new construction (not available in Oregon or Washington).”

Advance Notice – Effective October 1, 2025

□ Requirements Changes, cont'd

○ 11.5.9 Duct Insulation

- Clarifying that Duct insulation must have a pre-existing condition of “not insulated” to match Regional Technical Forum (RTF) workbook.

○ 11.8.2 Prime Window and Patio Door Replacement

- Adding “Vinyl frames to allowable double-pane window pre-conditions.”

○ 11.11 Residential Custom Projects

- Changing “BPA does not allow custom projects for multifamily construction.”
- Allowing custom projects for singular systems only.

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Measures	Savings	Payments
Air Sealing	Some increasing	No change
Air-Source Heat Pump	No change	All increasing
Ductless Heat Pumps	All decreasing	All increasing
Variable Speed Heat Pump	No change	All increasing
Clothes Dryers	Most increasing	No change
Clothes Washers	No change	All increasing
Duct Insulation	All increasing	No change
Heat Pump Water Heaters	Several increasing	All increasing
Insulation	Some increasing, few decreasing	No change
Exterior Insulated Doors	Increasing	No change
Thermostats	Few decreasing	No change
Windows	Some increasing, few decreasing	Most increasing

Questions?



Low Income

Amy Burke, Low Income Lead



Corrections: Effective April 1, 2025

❑ 11.9 Low Income Energy Efficiency Measures

○ RefNo Corrections:

- Low Income Single Family Duct Sealing Power System Coincident Peak Reduction (kW) and Distribution System Peak Load Reduction (kW).
- Low Income Manufactured Home Attic Insulation default payment (\$/unit) – this measure remains paid dollar-for-dollar for low income.

New Measure: Effective April 1, 2025

□ 11.9 Low Income Energy Efficiency Measures

- Low Income option for the Split-System HPWH will be available.
 - Savings will match non-Low Income measure options.
 - Payment cost cap will be **\$3,000**, which matches the current low income option for Unitary HPWHs – 50 gallons and above.

Advance Notice – Effective October 1, 2025

□ 11.9 Low Income Energy Efficiency Measures

○ Clarifications and References:

- Name changing from “Low Income Energy Efficiency” to “Energy Efficiency Income Qualified.”
- Individual multifamily units can income qualify even if the whole complex isn’t income qualified.
- Text references to be added that the Low Income Custom Project and Program rates are available to income qualified residents.
- Text reference to be added that the Home Energy Report measure is available to income qualified residents with the same payment.

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❑ 11.9 Change in Reference Numbers (RefNos)

- Expiring Low Income Ductless Heat Pump (DHP) RefNos and reissuing with new RefNos with “Any Cooling Zone” with a weighted average for savings, which may cause some savings to change.

❑ 11.9 Expiration of RefNos

- Expiring RefNos for any low income advanced thermostat that is not direct-install to align with the IM.
- Removing Low Income Door Sweep as a “By Request” measure distribution channel.

Advance Notice – Effective October 1, 2025

❑ 11.9 Clarification of Current Repair Cost Policy

- BPA is not allowing the cost of full roof replacements to be included within the low income payment cost cap or as a related repair cost.
- BPA is not allowing the cost of extended warranties to be included within the low income payment cost cap or as a related repair cost.
- Adding additional examples of allowable related repair costs for Low Income measures.

❑ 11.9 Requiring Two Low Income BEETS Fields

- Requiring low income measure cost field in BEETS.
- Requiring low income repair cost field in BEETS; enter \$0 if no repair costs are claimed.

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□ 11.9 New Related Repair Cost Requirement

- Capping related repair cost for any project with a measure cost of \$1,000 or higher, at 300% of the reported low income measure cost with no additional CAS review for exceptions. Example scenarios:

Measure Type	Measure Costs	Measure Payment Cost Cap	Repair Costs	Repair Cost Cap Allowed	Final Total Payment
Clothes Washers	\$900	\$800	Not allowed	N/A	\$800
Ductless Heat Pump	\$9,000	\$6,000	\$2,000	Up to \$27,000	\$8,000
Duct Sealing	\$1,200	\$750	\$5,000	\$3,600	\$4,350

Advance Notice – Effective October 1, 2025

□ 11.9 Change in Savings

Low Income Measure	Savings	Payments
Dryers	Increasing for most	No Change
Heat Pump Water Heater	Increasing some	No Change
Ductless Heat Pump	All decreasing	No Change
Duct Insulation	Increasing between 78% - 149%	No Change
Thermostat	Few decreasing	No Change
Insulation	Increasing for some; decreasing for some	No Change
Exterior Insulated Doors	Increasing	No change
Air Sealing	Increasing over 40% for manufactured homes	No Change
Windows/Patio Doors	Increasing for most (some over 30%); decreasing for some	No Change

Questions?



Thank you for your time

<https://www.bpa.gov/energy-and-services/efficiency/implementation-manual>

