

Education and Outreach Strategy for Oregon's Home Electrification and Appliance Rebates (HEAR) Program

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Introduction

Implementing a successful Home Electrification and Appliance Rebates (HEAR) program relies on having a thorough and thoughtful plan to conduct education and outreach activities that target existing and potential participants, especially households and contractors. Not only does the Oregon Department of Energy (ODOE) have experience through the operation of state energy efficiency programs, our implementer for investor-owned utility (IOU) service areas also has extensive experience with and capacity to conduct these activities. Through the reliance on existing activities, as well as the creation of new outreach channels and materials, Oregon hopes to ensure all qualifying and interested participants have an easy pathway to do so.

Planned Activities for Household Outreach

Overview

For the HEAR program, outreach efforts to households will focus on single family and multifamily buildings and on customers who qualify as low-income. Where possible, the program will target outreach efforts to the households and communities that these funds are likely to benefit most. ODOE is also

directed by state legislation¹ to work on energy efficiency programs in partnership with community-based organizations. In addition, one of our implementation partners – Energy Trust of Oregon (Energy Trust) – can leverage their existing, statewide quantitative and qualitative customer research to target and customize their education and outreach activities to priority communities and households. Our second implementation partner will be expected to similarly target their education and outreach activities to specific communities and households and to collaborate with ODOE and Energy Trust to execute these activities.

Below, we describe the planned outreach activities to these target populations, including the outreach partnerships, outreach channels, and educational materials that Oregon expects to utilize. This outreach, marketing, and communications strategy addresses the full customer journey cycle, from awareness to consideration, decision-making, loyalty, and advocacy. Outreach partnerships, outreach channels, and educational materials will be integrated to build trust, maximize visibility and reach, and meet each customer where they are in their journey.

Outreach Partnerships

To strengthen our outreach efforts to Oregon households, ODOE and our implementers will use partnerships with utilities, community organizations, and contractor networks. Oregon will coordinate with these partners to leverage their networks and communication channels to reach target demographics. Where possible, Oregon will co-create outreach strategies, tactics, social media kits, and educational materials with our partners.

Utilities: The HEAR Program will use new and existing relationships with the states’ energy utilities to leverage their communications channels and relationships with customers to disseminate information about the programs to households. Having served as the IOU’s energy efficiency implementer for many years, Energy Trust is well-positioned to help the HEAR program utilize existing utility communications channels to identify eligible households and connect them with program information. The programs’ second implementer will be expected to work with ODOE to build partnerships with consumer-owned utilities (COUs) and Idaho Power Company (IPC).

Community Organizations: ODOE will partner with key community organizations that have long-standing relationships and existing trust with Oregon residents. Energy Trust will leverage existing relationships with community-based organizations established through its Community Partner Funding program to raise awareness of the HEAR program and drive people to online resources through their social media channels, email, and outreach staff. ODOE expects the programs’ second implementer to engage community organizations, as necessary, to ensure their education and outreach activities reach targeted households in COU and IPC service areas.

Contractor Networks: Households often first learn about available rebates through contractors, so it will be essential to ensure enrolled contractors are able to identify eligible households and educate their customers about the program. ODOE and Energy Trust have established relationships with Oregon contractors, with ODOE maintaining an approved contractor list for the Oregon Rental Home Heat Pump Program and Energy Trust maintaining its Trade Ally Contractor Network. HEAR will leverage these existing networks, as well as the Home Energy Rebate programs’ enrolled contractor list, to ensure

¹ Oregon House Bills 3409 and 3630

contractors are prepared to help disseminate information about the HEAR program to eligible households.

Outreach Channels

Oregon will use different outreach channels for different market segments to maximize the effectiveness of our efforts. The use of each channel may depend on the characteristics of the target geography or audience segment (e.g., direct mail can be a better option for rural audiences). The rate of rebate delivery may also affect whether and how each channel is utilized.

Through the implementation and rebate delivery phase, Oregon expects to make use of the following outreach channels:

Advertising and Paid PR: Oregon’s program implementers will consider conducting targeted digital and radio advertising based on preferred information channels and languages of local communities.

Earned media: ODOE will issue press releases and pitch reporters around key program milestones, such as the program launch. Oregon will consider holding a launch event on the day our program becomes available to consumers. ODOE will make key agency leaders available for media appearances and events on an ongoing basis. Program implementers will also be available for media appearances and can leverage their existing media relationships to better target news sources within high-priority communities.

Websites: Before the programs launch, Oregon will publish a dedicated program website that will include all program guidance and educational materials, as well as the project application and contractor enrollment portals. ODOE has already published a landing page on the Department’s website to share information about the programs prior to launch.² In addition, 2023 Oregon House Bill (HB) 3630 directed ODOE to develop a website to be a “single source” for Oregonians to find information on incentives, qualified contractors, financing options, and energy efficiency programs. Oregon recently published the Energy Hub for Incentives Programs & Projects in Oregon (the Energy HIPPO).³ This information hub will enable households to enter basic information about a residential energy efficiency project and receive a summary of existing rebate programs for which the customer may qualify. In addition to these state resources, Energy Trust will also incorporate information about the programs into their webpages and other online materials.

Social media: ODOE, our implementers, and other partners can use social media accounts to post updates about the program as well as content (including videos, articles, and other materials) aimed at increasing program participation.

Video: ODOE will consider creating short videos that target homeowners and renters, post them on YouTube, and share them on our website and social media accounts. Program implementers will also amplify any video content through their own channels. Possible topics include explainer videos on technologies, projects, and households covered under the program; guidance for households who participate in the program; and testimonials from consumers.

² <https://www.oregon.gov/energy/Incentives/Pages/home-energy-rebates.aspx>

³ <https://incentives.oregon.gov/>

Email and online newsletters: ODOE provides an online sign-up form for interested entities to receive periodic program updates⁴ and will continue to distribute information about the programs through this existing channel after launch. The program will also leverage partnerships with utilities and other organizations to reach their existing audiences to share programmatic information in their digital communications channels. In addition, Energy Trust will coordinate with IOU marketing teams to identify opportunities to leverage their direct marketing channels to target customers.

Phoneline: The program’s website and materials will specify how customers with specific questions can speak to someone directly. Households with general questions about rebates or the IRA programs will be able to call ODOE’s main line and be transferred to a knowledgeable customer service representative. Households who are ready to pursue a rebate and want to speak with someone about their project will be directed to call the appropriate implementer directly.

Events: ODOE and our implementers will look for opportunities to make information available at large public forums such as county fairs and festivals. Program implementers will be able to share program information at local community events and other homeowner events hosted by Energy Trust, other non-profits, or social service organizations. In addition, ODOE will continue to conduct public engagement sessions to share information about the programs, understand community interests, and inform the program design and operation. ODOE also has a Community Navigator program that is designed to foster collaboration and empower local communities to develop energy projects; ODOE’s Community Navigator staff also frequently attend events and meetings throughout the state and will be able to share information about the HEAR program.

Digital and printed materials: Oregon will create multilingual flyers and materials that can be provided to partner organizations to send to customers (for example, as an insert to customer utility bills).

Annual virtual meeting: ODOE will host, and our implementers will attend, an annual meeting for households and other stakeholders to hear about the programs’ progress, learn about program updates, and respond to questions and concerns. ODOE will consider hosting these meetings more frequently, if the need arises.

Materials

Oregon, in partnership with implementers, will develop a range of educational materials for households and multifamily building owners across a variety of media. Much of the work under this section is statutorily required under Oregon HB 3409 and 3630, which also provide funding for state staff. As Oregon gains experience with these programs and identifies trouble points or barriers to adoption with our target audiences, we will revise and/or develop new materials and messaging to address these challenges.

Website content and other online materials: The program website will provide online access to information directed to Oregon households, including targeted program guidance, eligibility criteria, and application instructions. The website will also include – or provide links to – educational resources such as energy efficiency tips and information about heat pumps. It will also include a link to the approved contractor list and information about how to use it to participate in the programs. In addition, the HIPPO enables households to enter basic information about themselves (such as their household size, income,

⁴ See page 2 of the sign-up form, here: <http://web.energy.oregon.gov/cn/a6n53/subscribe>

housing type, and location), and receive a summary of and links to the existing rebate programs for which they may qualify.

Flyers and other printed materials: Simple multilingual brochures and flyers — intended for distribution at public events, in direct mailings, and downloadable from a website — will outline the available rebates, their eligibility criteria, and the benefits of participation, including energy bill savings, increased comfort, and associated environmental benefits.

FAQs: Oregon will continue to publish a list of frequently asked questions (FAQs) to address common questions that homeowners have about the Home Energy Rebate programs and other concerns related to energy efficiency and electrification upgrades.

Talking points: ODOE and our implementers will develop programmatic talking points for call center staff and any staff engagements with the media.

Success stories: Showcasing customer stories demonstrates loyalty and can build trust among other members of their community. As households enroll and complete projects, it will be important to capture success stories that can be shared through various channels, including on the website and social media channels, in outreach materials, and through local media.

Planned Activities for Contractor Outreach

Overview

ODOE, our implementation partners, and the Training for Residential Energy Contractors (TREC) program team will target HEAR outreach to contractors, particularly those who specialize in HVAC, insulation, electrical, and associated building performance work. The programs will connect interested firms to available project incentives, workforce development resources, and emerging career pathways in building electrification and efficiency. By fostering connections across stakeholder groups, ODOE aims to build contractor knowledge, expertise, and business alignment for delivering high-quality projects that serve community needs. Additionally, the programs will further target contractors with diverse business certifications and provide additional resources to assist with their participation in the program. In many cases, this type of content is also legislatively mandated.

Outreach Partnerships

Distributors and Manufacturers: ODOE's implementation and TREC partners will collaborate with equipment distributors and manufacturers to reach contractors; this will include in-field activities such as attendance at equipment trainings and events, as well as hosting counter days at supply houses.

Workforce development organizations: To promote opportunities, Oregon will collaborate with unions, trade associations, and registered apprenticeship programs, while also partnering with workforce development groups such as Earth Advantage, EnerCity Collaborative, Oregon Training Institute, Oregon Workforce Partnership, and the regional workforce boards of Oregon, including Clackamas Workforce Partnership, Lane Workforce Partnership, Southwest Oregon Workforce Investment Board, East Cascades Works, Northwest Oregon Works, Willamette Workforce Partnership, Eastern Oregon Workforce Board, Rogue Workforce Partnership, and Worksystems Inc.

Industry partners and trade organizations: Oregon will engage with industry partners so they can share details on programs, jobs, and skills with their memberships and networks. Structured collaboration will include key groups like building trades councils, unions, and apprenticeship programs such as the Oregon Building Trades Council, IBEW, SMACNA Oregon and SW Washington, Mid-Valley HVAC JAC, Columbia Gorge HVAC JTAC, NECA-IBEW Electrical JATC, Area II Inside Electrical JATC, Central Electrical JATC, Pacific Inside Electrical JATC, Crater Lake Electrical JATC, Area VII LTD Residential Electrical JATC, and more.

Community-based organizations and non-profits: ODOE and program implementers will work with local community-based organizations and non-profits to provide ongoing support for contractors. The organizations with which the programs coordinate depend on the CBO's resources and staffing capacity, as well as the relevance of the programs to their current work and target audience.

Other residential efficiency programs: ODOE will engage with existing utility home retrofit, HVAC, and weatherization programs to leverage their trade ally networks and streamline the enrollment processes. Such programs are implemented by Energy Trust, Oregon Housing and Community Services, and ODOE.

TREC: While developing ODOE's TREC application, ODOE conducted listening sessions with CBOs, environmental justice groups, trade organizations, unions, and energy organizations to better understand how to design the program to overcome participation barriers. ODOE will also utilize a workforce advisory committee, established through the TREC formula grant, to review contractor education materials and market the programs.

Outreach Channels

The programs will leverage several different outreach channels to market to contractors and engage them in the program. Through these channels, ODOE and our implementers will promote contractor participation in the programs and advertise related workforce opportunities. These channels will also help contractors who are engaged in the program learn about best practices, new opportunities, and program changes. The program will determine the best channels for contractor outreach and education by working with our trade association and workforce partners. The expected outreach channels include the following:

Advertising: Oregon will consider pursuing advertisement opportunities, as appropriate, in key trade publications, newsletters, and websites, with a goal of raising program awareness and driving contractors to our website and local training sessions for more information.

Earned media: Oregon will collaborate with trade associations and unions to issue joint press releases and secure media coverage in industry news outlets around key program milestones, such as launch dates, training opportunities, and enrollment deadlines. ODOE and our implementers will pitch success stories profiling participating contractors.

Websites: As described previously, not only will the Home Energy Rebate programs have their own dedicated website, Oregon has also created and published the Energy HIPPO, which is a "one-stop-shop" for information about residential energy efficiency, including information about incentives, energy efficiency trainings, qualified contractors, financing options, technical assistance, and other energy efficiency programs. The Energy HIPPO also contains educational information targeted to construction industry and related industry workers on methods and techniques for installing electrification projects. The Energy HIPPO will host materials developed through the state's workforce development programs,

and it will have a dedicated contractor section outlining rebate eligibility requirements, the benefits of participation in the HEAR programs, the enrollment process, available trainings, and more. The Energy HIPPO also enables contractors to enter basic information about a customer and receive a summary of existing rebate programs for which the customer may qualify. In addition, the [Energy Trust Insider](#) page provides news and resources targeted to contractors, and this resource will also be used to share information about the programs.

Social media: ODOE and program implementers will work with trade groups to promote the program on their social media channels and encourage contractors to post about their participation.

Video: Oregon will create short videos targeting contractors, post them on YouTube, and share them with industry partners. Possible topics include program overviews, how-to guides for key steps like enrollment, rebates/incentive processing, and testimonials from participating contractors. Energy Trust may also share this content with members of its Trade Ally Network or outreach partners.

Email and online newsletters: ODOE and the program implementers will use existing email lists, blogs, and newsletters to provide periodic updates that can include information about program launch, progress, changes, success stories, and other resources.

Phoneline: Contractors who want to speak with someone about the HEAR program will be directed to call either ODOE or our program implementers. Staff will be able to walk contractors through program information, participation agreements, and any other questions they may have. Implementer staff will be available to help contractors develop and complete projects in their respective service areas. Implementers will develop reference materials and programmatic talking points for call center staff. Contractors enrolled in an Energy Skilled training through the TREC program will also have access to additional, personalized support for technical and business assistance.

Events: ODOE and our implementers will have a presence at major industry conferences and events with a program booth, brochures, and staff to answer questions. Oregon will utilize existing events run by utility partners and community action agencies that engage contractors who install energy efficiency technology and upgrades. Energy Trust can also present at their own hosted events, including Trade Ally Forums and other unique, smaller events in more remote areas of the state. Oregon will also seek speaking opportunities to present the program and testimonials from participating contractors. ODOE's Community Navigator also attends workforce, contractor, and other economic development events and meetings throughout the state and will be able to share information about the HEAR program.

Digital and printed materials: Oregon will develop program fact sheets and other outreach materials that will be available online as well as in print form for program staff to distribute at contractor outreach events. These materials will also be available to outreach partners for their direct mailings or for distribution at trade events, community events, and other opportunities.

Quarterly virtual office hours: On a quarterly basis, Oregon will host virtual office hours targeted to contractors where staff can share program updates, solicit input, discuss a particular topic in depth, and respond to questions and concerns.

Materials

ODOE is already developing education and outreach materials for contractors who work on or would like to work on residential energy efficiency projects. In Executive Order 20-04, then-Governor Brown set a goal of reducing energy use 60 percent below 2006 levels by 2030 for both residential and commercial buildings. Oregon HB 3409 identified the need for additional workers to implement energy efficiency measures – particularly heat pump technologies – and allocated \$2 million to bolster the energy efficiency workforce. ODOE intends to use funding from this account as well as the Energy Auditor Training (EAT) and TREC grants (both formula and competitive, if awarded) to increase the capacity of installers to meet the demand created by the HEAR incentives. These programs will develop contractor training materials on heat pump installations, weatherization, plumbing, energy auditing, and business management. These trainings will provide information on accessing incentives and will be modular, technical, and available both in-person and online. Oregon will work with CBOs to ensure that materials are culturally specific and follow industry best practices. Ensuring contractors have access to Energy Skilled and certified training programs will allow homeowners to receive quality installations through the HEAR program.

Website content and other online materials: The Home Energy Rebate programs' website will include a section with information for interested contractors. This section will highlight the benefits of participation as well as the program specifications, requirements, and enrollment process. It will also contain information on available training programs, such as those funded by the TREC and EAT grants. Additionally, on-demand training resources will be available for program and technical assistance; these trainings will include existing trainings published by U.S. DOE as well as trainings developed through Oregon's TREC program and related workforce development programs. Energy Trust will include links to web content and online materials on its own trade ally pages to promote the program to trade allies visiting those pages.

Factsheets, brochures, and other printed materials: ODOE, in collaboration with the implementers, will create collateral and reference documents for contractors that include in-depth information on the qualified products and eligibility requirements; such materials could include presentations, brochures, informational sheets, etc. ODOE will also develop multilingual fact sheets and brochures describing the available training programs and related certifications. These materials will be printed and available for distribution at events, as well as available for download from the programs' website. Energy Trust will also include links to this content, as appropriate, in its trade ally-facing website and materials.

FAQs: ODOE will produce FAQ documents that concisely address common questions regarding required job skills, relevant training, and emerging career pathways.

Talking points: ODOE and our implementers will develop programmatic talking points for call center and field staff who engage with contractors, installers, distributors, and retailers.

CBO Communication Toolkits: Energy Trust will leverage messaging and materials from ODOE to create toolkits for CBOs. These toolkits will include a curated suite of information, educational materials, and prepared digital content that CBOs may share with their constituents or incorporate into their communication channels. Toolkits may also include technical details and messaging guidance for CBO field staff.

Success stories: As contractors complete projects, it will be important to capture success stories that can be shared through various channels, including on the website and social media channels, in outreach materials, and in local media. Energy Trust will also amplify this content through its own online channels.

Planned Activities for Retailer and Distributor Outreach

Overview

Retailers and distributors play a key role in connecting customers with energy-efficient products and incentives. Our outreach efforts will focus on strengthening partnerships, providing clear program information, and ensuring retail and distribution staff can effectively promote incentives to their customers. ODOE will also leverage existing relationships and partnerships with organizations that have retailer and distributor connections that could be leveraged to increase participation, share information, and help ensure successful implementation of the program.

Outreach Partnerships

Retailers: Oregon will collaborate with home improvement stores and hardware stores that sell qualifying energy-efficiency products.

Distributors: Oregon will work with regional and national distributors to ensure contractors and customers have access to qualifying products when purchasing materials.

Outreach Channels

In-store Engagement: Oregon will provide retailers with signage, training materials, and promotional displays for use in-store.

Distributor Collaboration: Oregon will offer co-branded materials and training sessions for distributor sales teams.

Digital Outreach: Oregon will equip retailers and distributors with digital content including social media graphics, email templates, and website banners.

Events and Webinars: Oregon will host informational sessions to educate retail and distributor staff about incentive offerings and program updates.

Materials

Point of Sale Displays: Oregon will create materials to be used by retailers on-site to market the availability of the program; materials can include posters, shelf tags, and promotional stickers that highlight eligible products.

Customer Handouts: Oregon will create simple, engaging materials that explain the program benefits and how to participate. Materials will be available to retailers and distributors to provide to customers.

Training Resources: Oregon will create quick-reference guides and frequently asked question sheets to inform retailer and distributor employees about the programs and how they work.

Marketing Toolkits: Pre-made email templates, social media posts, and website content will be provided to retailers and distributors for digital promotion.

Timeline

Some education and outreach activities will be ongoing through the end of the program, while others will primarily be executed early in the program. Contractor outreach related to the enrolled contractors list will begin during the pre-launch phase, in order to build capacity and ensure contractors are prepared to participate as soon as the programs open. We do not anticipate that the programs will need much advertising, especially at the start, and so the program will only consider using this channel after the first few years, as necessary, if the program is struggling to deliver rebates. Activities that are certain to occur are shown with an “x”; potential activities are shown with a “~”.

Household Outreach

Timeline	Pre-Launch	First Year	Second Year	Third Year to End
Advertising	-	-	~	~
Earned media	-	x	x	~
Website	x	x	x	x
Social media	x	x	x	x
Video	-	x	x	-
Email & online newsletters	x	x	x	x
Phoneline	x	x	x	x
Events	x	x	x	x
Digital and printed materials	-	x	-	-
Quarterly virtual office hours	-	x	x	x

Contractor Outreach

Timeline	Pre-Launch	First Year	Second Year	Third Year to End
Advertising	-	~	~	~
Earned media	x	x	~	~
Website	x	x	x	x
Social media	x	x	x	x
Video	x	x	-	-
Email & online newsletters	x	x	x	x
Phoneline	x	x	x	x
Events	x	x	x	x
Digital and printed materials	x	x	-	-
Quarterly virtual office hours	-	x	x	x

Budget

Cost Category	Estimated Cost
Marketing, education, and outreach, including the funding of local governments and place-based organizations to assist with these activities	\$1,745,851