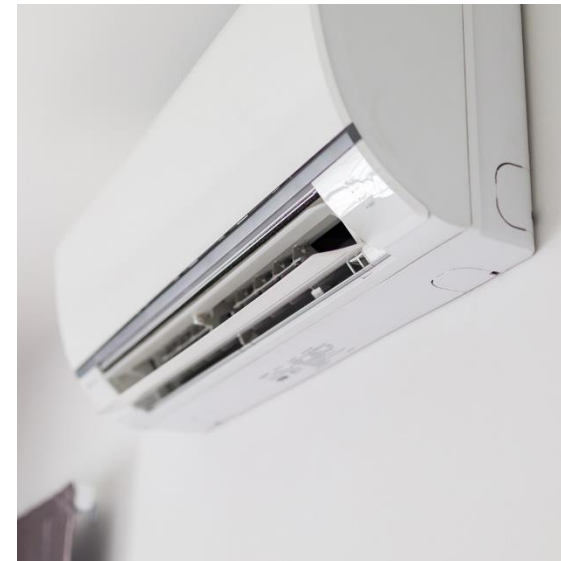


# Oregon Department of **ENERGY**

## Home Energy Rebate Programs

Public Info Webinar  
May 8, 2025





# OREGON DEPARTMENT OF ENERGY

Leading Oregon to a safe, equitable, clean, and sustainable energy future.

## Our Mission

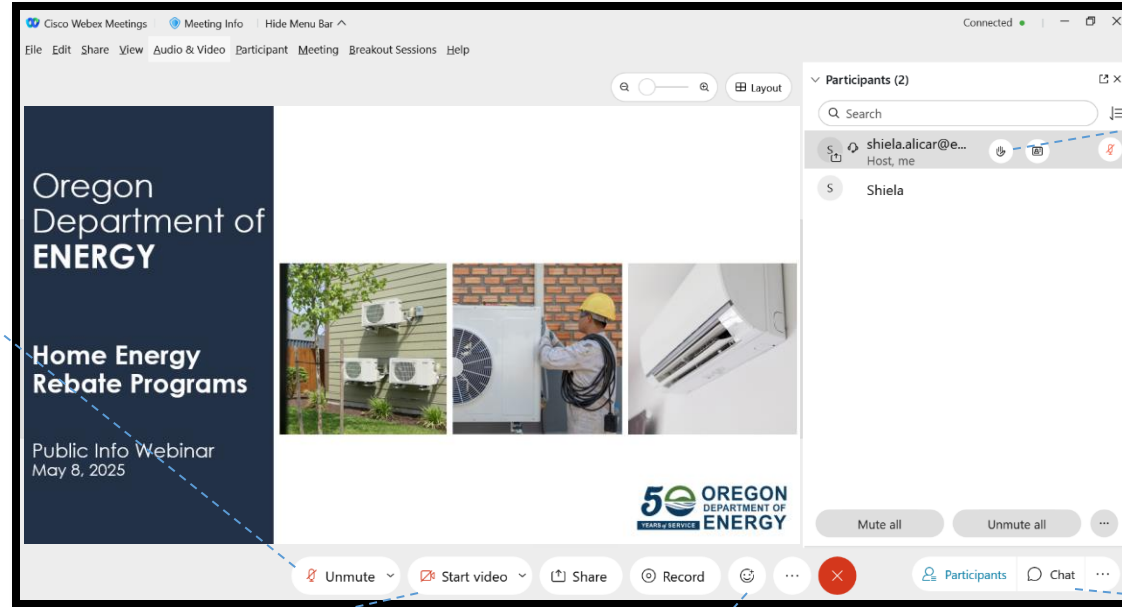
The Oregon Department of Energy helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.

## What We Do

On behalf of Oregonians across the state, the Oregon Department of Energy achieves its mission by providing:

- A Central Repository of Energy Data, Information, and Analysis
- A Venue for Problem-Solving Oregon's Energy Challenges
- Energy Education and Technical Assistance
- Regulation and Oversight
- Energy Programs and Activities



# USING WEBEX



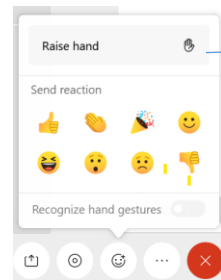
## Audio Options

-  Mute *Microphone On*
-  Unmute *Microphone Off*

## Video Options

-  Stop video *Webcam On*
-  Start video *Webcam Off*

## Reactions



Click to Raise your hand.

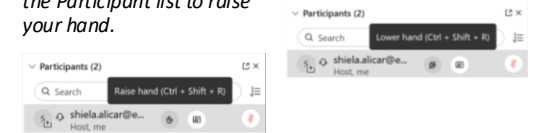


Click on Lower hand when you are done.

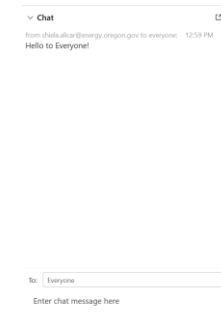
## Second Raise Hand Option

You can also click on the hand next to your name in the Participant list to raise your hand.

Click on Lower hand when you are done.

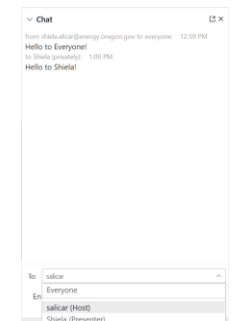


## Chat



You can chat to Everyone in the meeting.

You can send a private message to the Host or Presenter (or all Panelists when there is a Panel).



# AGENDA

Background information and high-level details about the Home Energy Rebate Programs

Summary of program design and implementation details, and current timeline

Other existing rebate programs and resources

Implementation Blueprint:

- Income qualification
- Installation incentives
- Project requirements
- Home assessments
- Energy modeling (HOMES program only)
- Point-of-Sale (HEAR program only)
- Consumer Protection Plan
- Education and outreach Strategy

# THE HOME ENERGY REBATES PROGRAMS

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- The Home Energy Rebate Programs were established by the 2022 Inflation Reduction Act (IRA)
  - [HR 5376 Sections 50121 and 20122](#)
- The programs are designed to:
  - Help households save money on energy bills
  - Upgrade to clean energy equipment
  - improve energy efficiency
  - improve comfort
  - support a stable power grid
  - reduce indoor and outdoor air pollution
- U.S. Department of Energy establishes the program requirements and distributes the funds as formula grants to State Energy Offices and Tribes
- U.S. DOE allocated approximately \$113 million to Oregon for both programs
- Funds are available through September 30, 2031
- *No longer part of the federal program: the [Justice40 Initiative](#)*

## Home Efficiency Rebates ("HOMES")

## Home Electrification and Appliance Rebates (HEAR)

Performance-based rebates for energy efficiency retrofits. Projects must demonstrate at least 20% estimated energy savings to be eligible. Larger rebates are available for estimated savings of 35% or more.	Rebates for specific electric appliances and associated upgrades. Appliances must be a first-time purchase or must replace a non-electric appliance.
Energy assessment and energy model are required.	An energy assessment is required to receive a rebate for a heat pump for space heating & cooling.
Existing buildings only.	Existing buildings and new construction.
Partially income-restricted: <ul style="list-style-type: none"> <li>• 40% of rebate funding reserved for low-income</li> <li>• 10% of rebate funding reserved for low-income multifamily</li> <li>• 50% of rebate funding unrestricted</li> </ul>	Fully income-restricted: <ul style="list-style-type: none"> <li>• 60% of rebate funding reserved for low-income</li> <li>• 20% of rebate funding reserved for low-income multifamily</li> <li>• 20% of rebate funding reserved for low- or moderate-income</li> </ul>
USDOE allows funding of projects initiated after Aug. 16, 2022. Projects must still meet all program requirements.	USDOE does not allow retroactivity.
No point-of-sale purchases.	Rebates will be available for point-of-sale purchases of specific equipment/upgrades.

# INCOME CATEGORIES

- Area Median Income (AMI) is calculated by household size and county.  
<https://tinyurl.com/OregonAMI>  
(xls file)

Income category	Income Limit, by household/unit
Low-Income	<80% AMI
Moderate-Income	80%-150% AMI
Higher-Income	150% AMI and greater

- For rental properties, eligibility is established based on tenant income.
- For multifamily buildings, at least 50% of households must be eligible.
  - For qualifying buildings, all units will be able to receive the low-income rebate levels.

# HOMES REBATE LIMITS: SINGLE-FAMILY

Income Level	Projects that demonstrate potential energy savings of...	...Are eligible to receive the lesser of...
Low-Income	20%-34%	\$8,000 or 100% of cost
	35% or greater	\$10,000 or 100% of cost
Moderate-Income and Higher	20%-34%	\$2,000 or 50% of cost
	35% or greater	\$4,000 or 50% of cost



# HOMES REBATE LIMITS: MULTIFAMILY

Income Level	Projects that demonstrate potential energy savings of...	...Are eligible to receive the lesser of...
Low-Income	20%-34%	\$8,000 per unit or 100% of cost
	35% or greater	\$10,000 per unit or 100% of cost
Moderate-Income and Higher	20%-34%	\$2,000 per unit or \$200,000 per building
	35% or greater	\$4,000 per unit or \$400,000 per building



# HEAR ELIGIBLE MEASURE AND REBATE LIMITS

Income Level	Rebate Limit
Low-Income	100% of cost
Moderate-Income	50% of cost



Upgrade Type	Qualified Product/Measure	Rebate Limit
Appliances	Heat Pump Water Heater	\$1,750
	Heat Pump for Space Heating and Cooling	\$8,000
	Electric Heat Pump Clothes Dryer	\$840
	Electric Stove, Cooktop, Range, or Oven	\$840
Building Materials	Electric Load Service Center	\$4,000
	Insulation, Air Sealing, and Ventilation	\$1,600
	Electric Wiring	\$2,500
<b>Maximum Rebate</b>		<b>\$14,000</b>

# PROPOSED DESIGN & IMPLEMENTATION DETAILS

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- Two implementer organizations:
  - Energy Trust of Oregon to implement in Investor-Owned Utility service areas
  - RFP process has selected Earth Advantage as the programs' implementer for Consumer-Owned Utility and Idaho Power Company service areas
- Implementers will, among other things:
  - Process rebate applications
  - Work with contractors to help them participate and ensure high-quality installations
  - Work with households to access funding and comply with program requirements
  - Work with utilities to market the programs, help customers access all available funding, and share program information and updates

# PROPOSED DESIGN & IMPLEMENTATION DETAILS

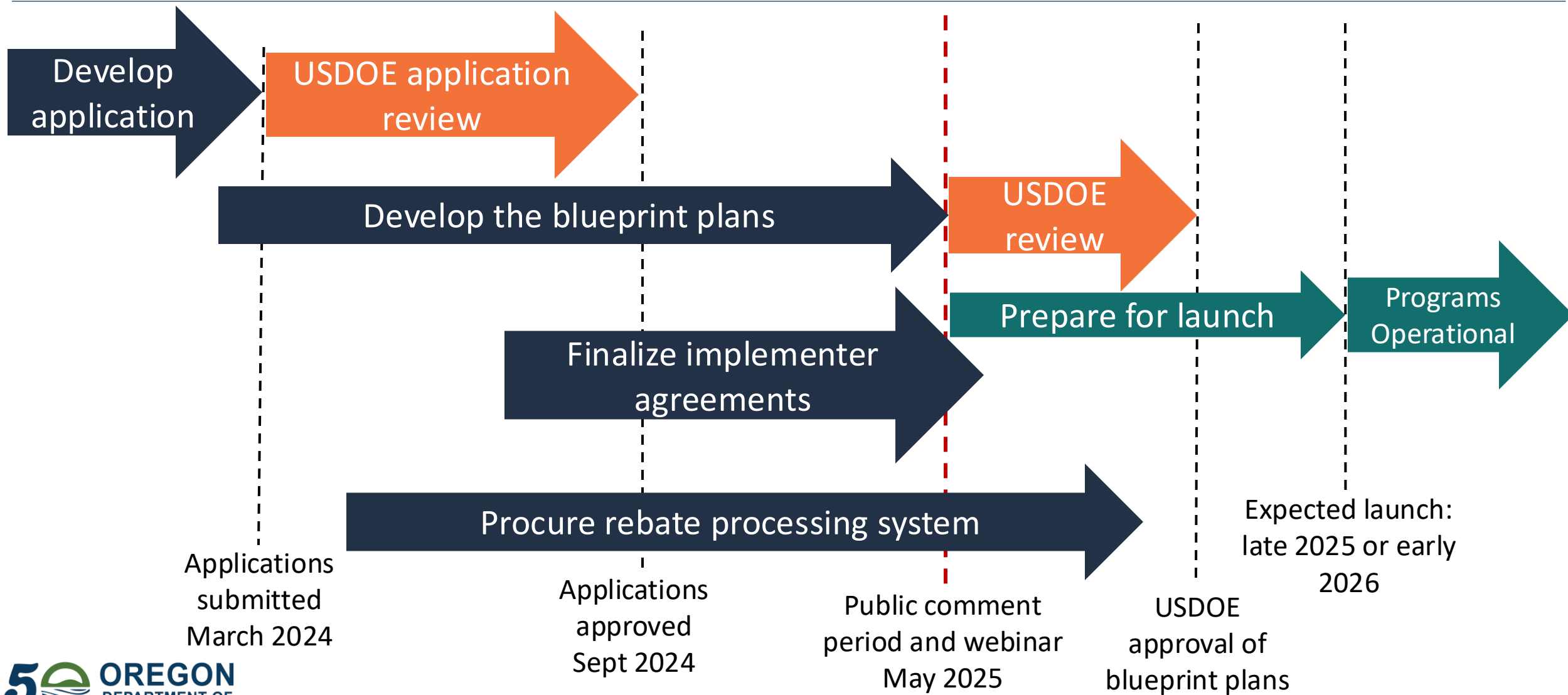
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ODOE plans to issue an RFP to procure a rebate management system consisting of:

- A program website
- An online application portal for rebate applicants and contractor enrollment
- A secure database to store all application materials
  - Database will be used by the program implementers to process rebate and contractor applications, and manage/track other program activities and data.



# CURRENT TIMELINE



# OTHER REBATE PROGRAMS

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- [Oregon Heat Pump Purchase Program](#): Anticipated opening in Spring 2025
- [Oregon Rental Home Heat Pump Program](#): Limited funds left; currently only available to Tribes
- [Community Heat Pump Deployment Program](#): Limited funds left; only available in some regions
- [IRS Energy Efficient Home Improvement Credit](#)
- Oregon Utility Programs
  - IOU customers contact [Energy Trust](#)
  - COUs and Idaho Power Company customers contact the utility directly



[Energy Hub For Incentives  
Programs & Projects in Oregon](#)

(Energy HIPPO)

[incentives.oregon.gov](https://incentives.oregon.gov)

[HOMES Consumer Protection Plan](#)

[HOMES Education and Outreach Strategy](#)

[HOMES Narrative Document](#)

[HOMES Data Access Plan](#)

[HEAR Consumer Protection Plan](#)

[HEAR Education and Outreach Strategy](#)

[HEAR Narrative Document](#)

Implementation Blueprint

# INCOME QUALIFICATION

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For income-restricted rebates, all projects will begin with income verification through one of two pathways:

## 1. Proof of Income:

- Households will submit proof of income and their household size
- Submitted directly to the programs' application portal (not yet available)
- Income is defined as combined gross income for all adult household members, for either the past 12 months or the prior tax year gross earnings
  - Income includes all gross wages, tips, rental income, public assistance, social security or pensions, income from self-employment, alimony, interest, or any other sources of income defined by the IRS income tax return for the previous tax year
- <https://www.irs.gov/individuals/get-transcript>

# INCOME QUALIFICATION

For income-restricted rebates, all projects will begin with income verification through one of two pathways:

## 2. Categorical Eligibility:

- Households will submit documentation that demonstrates at least one household member participated in at least one pre-qualifying program within the most recent program renewal period
- Approved programs for **single-family** households include the following:

Low Income Home Energy Assistance Program (LIHEAP)

Medicaid

Supplemental Nutrition Assistance Program (SNAP)

Head Start

Lifeline Support for Affordable Communications (Lifeline)

Food Distribution Program on Indian Reservations (FDPIR)

National School Lunch Program – Free (NSLP)

Housing Improvement Program (HIP)

Housing Opportunities for Persons with AIDS

Supplemental Social Security Income (SSI)

Weatherization Assistance Program (WAP)\*

Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)\*

Verified government or non-profit program serving Asset Limited Income Constrained Employed (ALICE) persons or household

\*For WAP and WIC, per federal program requirements, categorical eligibility is only allowable for specific counties and household sizes

# INCOME QUALIFICATION

For income-restricted rebates, all projects will begin with income verification through one of two pathways:

## 2. Categorical Eligibility:

- Households will submit documentation that demonstrates at least one household member participated in at least one pre-qualifying program within the most recent program renewal period
- Approved programs for **multifamily** households include the following:

Public Housing (housing owned by Public Housing Authorities)

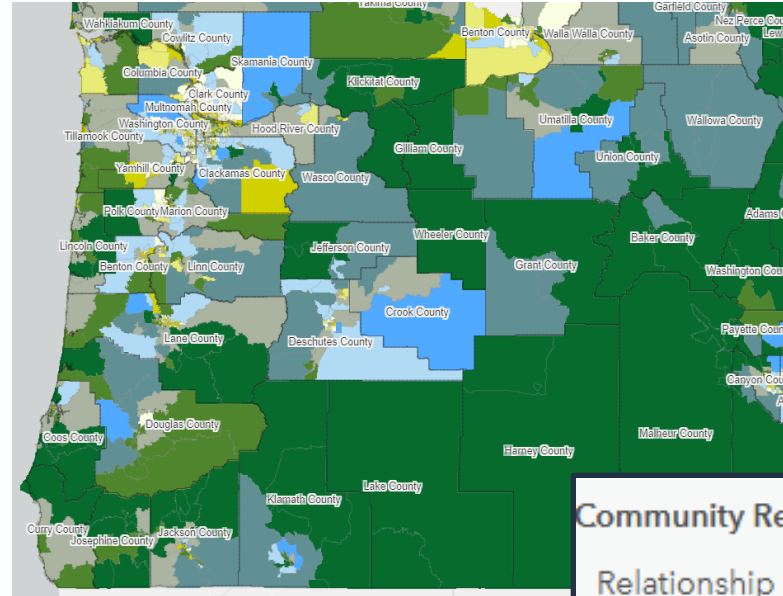
Privately owned multifamily buildings receiving project-based assistance (Section 8, Section 202, Section 811):  
Whole building is eligible if 50% of housing units are subsidized through these programs

Privately-owned multifamily buildings that house residents receiving tenant-based assistance: Whole building is eligible if 50% tenants are receiving this assistance

Low Income Housing Tax Credit (LIHTC): Whole building is eligible if 50% of housing units are income-restricted

# INSTALLATION INCENTIVES

- Installation incentives are available to installation contractors for HOMES and to “Eligible Entity Representatives” (EER) for HEAR
  - EER = A government, commercial, or nonprofit entity; includes installation contractors
- HEAR installation incentives must be for a “substantial installation,” i.e. any eligible upgrade type *except* installation of electric stoves and electric heat pump dryers
- \$200 available for projects completed in areas identified on the [Northwest Clean Energy Atlas \(NCEA\) map of poverty and energy burden](#) as “high” for either metric or “medium” for both metrics

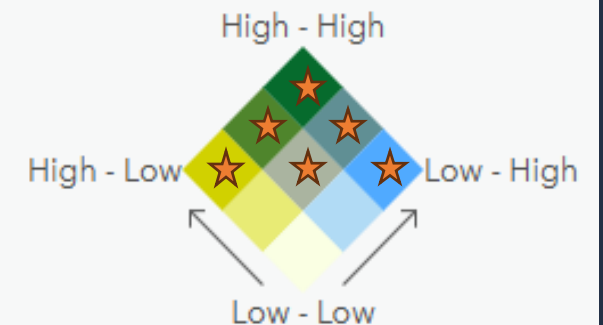


## Community Relationships

### Relationship

↖ % Individuals at or below 150% of the Federal Poverty Line

↗ Energy Burden



# INSTALLATION INCENTIVES (HEAR)

- For the HEAR program, installation incentives are available for additional qualifying activities
- HEAR installation incentives must not exceed the individual amounts listed in the table
- Total HEAR installation incentives must not exceed \$500 per project or unit

Qualifying Activity for HEAR Installation Incentives	Incentive
Substantial installation located within a community identified on the NCEA map	\$200
Installation of one or more electric heat pump water heaters	\$150
Installation of one or more electric heat pumps for space heating and cooling, per dwelling unit – ducted	\$300
Installation of one or more electric heat pumps for space heating and cooling, per dwelling unit – non-ducted	\$200
Installation of one or more electric load service center	\$150
Installation of insulation, per dwelling unit	\$250
Installation of air sealing and materials to improve ventilation, per dwelling unit	\$250
Installation of electric wiring, per dwelling unit	\$250
<b>Maximum Incentive per Project</b>	<b>\$500</b>

# PROJECT REQUIREMENTS

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- All HOMES projects, and all HEAR projects that include a heat pump for space heating and cooling, must work with an enrolled contractor
  - Contractors will be able to enroll through the programs' website portal
  - Enrollment will begin before program launch
  - Contractors will have an expedited pathway to enrollment if they are approved through, and in good standing with, the Oregon Rental Home Heat Pump Program and/or Energy Trust of Oregon
- For newly enrolled contractors, implementers will inspect the first five project installations
- For all contractors, at least 5% of projects will be inspected; the rate of inspection may increase at any time, for any contractor, for any reason
- All rebate coupons and rebate reservations will expire after 180 days
  - Before the rebate expires, applicants may request one 180-day extension
- Implementers will issue reimbursements within four weeks of receipt of **required and acceptable** information

# HOME ASSESSMENTS

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- For the proposed project, the Energy Assessors must collect and/or produce the information outlined in Tables 3, 4, and 6 of USDOE's Data & Tools Requirements Guide\*
- The limited home assessment collects basic information about the characteristics of the home and the HVAC system
- The HOMES assessment also collects basic information about the characteristics of the home and the HVAC system, plus additional details about the roof, walls, windows, and the existing appliances
- Single-family homes and multifamily properties with no (or limited) shared spaces or equipment will fulfill the home assessment requirements through the completion of a [Home Energy Score](#)
- Multifamily properties with shared spaces and/or equipment will complete an ASHRAE Standard Level II energy audit

# ENERGY SAVINGS MODELS (HOMES)

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- HOMES projects must demonstrate that the upgrades can achieve at least 20% estimated energy savings
- Models must be completed using USDOE-approved software, which include:
  - Snugg Pro
  - OptiMiser
- To complete the model, most customers will need to provide the most recent 12 months of the home's energy use data
- Assessors will use an alternate approach for the following project types:
  - Homes with delivered fuels or onsite generation
  - The utility ratepayer attests that they cannot locate recent bills and are unable to access them from their utility
  - Homes where occupants have lived in the home less than one year
  - Multifamily homes

# POINT-OF-SALE (HEAR PROGRAM)

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- ODOE and our implementers will work with retailers to enable rebates to be available for point-of-sale purchases (excludes heat pumps).
- Applicants will be required to submit income documentation for verification before submitting a reservation request.
- Once the application is approved, applicants will select from a list of participating retailers to receive a coupon.
- While rebate reservations expire after 180 days, coupons may expire before 180 days, so applicants may have to request a new coupon before they need to request an extension.

# CONSUMER PROTECTION PLANS

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- The Consumer Protection Plans describe how the programs will:
  - Collect and handle feedback and complaints
  - Review projects for completeness and accuracy
  - Ensure rebates are provided by skilled and knowledgeable contractors
  - Describe the installation and inspection requirements
    - The programs will publish a separate, yet related, document that specifically outlines the programs' installation guidelines.
  - Monitor progress, identify concerns, and continuously improve the programs



# EDUCATION AND OUTREACH STRATEGY

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- The Education and Outreach Strategy describes materials and activities that the programs will use to inform households, communities, contractors, retailers, and other partners about the programs
- ODOE and our implementers will engage with community groups, utility staff, trade organizations, educational programs, and others
- The programs will periodically offer targeted trainings and webinars, including at least one annual meeting to share progress and updates
- Program staff will be available through phone or email to help customers navigate the programs



# Thank You!

Contact:

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&

[HomeEnergyRebates@energy.oregon.gov](mailto:HomeEnergyRebates@energy.oregon.gov)

Website:

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



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