

Low and Moderate Income (LMI) Eligibility

Heat Pump Purchase Program (HP3)

ODOE requests that contractors indicate if a household qualifies as LMI when applying for an incentive through the Heat Pump Purchase Program (HP3). ODOE will use the same LMI classifications for HP3 as are used for the Oregon Rental Home Heat Pump Program (ORHHP). Households qualify as LMI if the tenant(s) or owner occupying a residence falls into one of the following three categories: affordable housing, participation in an assistance program, or the household adjusted income is less than or equal to 100% of the state median income (adjusted by household size).

Key Points:

- ◆ **LMI eligibility is not required for participation in the program and will not increase the incentive amount available.**
- ◆ The department requests this information for reporting purposes.
- ◆ Contractors should request this information from owners. Owners may indicate that the project qualifies as LMI based upon their knowledge or request information from tenants if necessary.
- ◆ **Owners and tenants are not required to provide proof of eligibility or specify which program they participate in.** They simply need to state that the project qualifies as LMI if the occupant(s) meet one or more of the following criteria.

Please contact the HP3 team at HP3@energy.oregon.gov with any questions regarding the LMI classification process.

A Project Qualifies as LMI if it meets one or more of the following criteria:

The Rental Qualifies as Affordable Housing:

- A housing capital funding offering issued through a Notice of Funding Availability
- Low Income Housing Tax Credits
- Oregon Multifamily Energy Program
- Conduit/Pass-Through Revenue Bond Financing Program
- Local Innovation and Fast Track Housing Program
- Loan Guarantee Program and General Guarantee Program
- Oregon Rural Rehabilitation Loan Program
- Housing Choice Voucher Program (Section 8)

The Tenants Participate in One or More Assistance Programs:

- Supplemental Nutrition Assistance Program (SNAP)
- Oregon Health Plan (OHP) (Medicaid)
- Children’s Health Insurance Program (CHIP)
- Temporary Assistance for Needy Families (TANF)
- Low Income Home Energy Assistance Program (LIHEAP)
- Oregon Energy Assistance Program (OEAP)
- Low Income Weatherization Assistance Program

The Household Adjusted Income Qualifies as LMI:

The household adjusted income is less than or equal to 100% of state median income adjusted to the applicable household size (shown in table below) in the most recent tax filing year.

Household Unit size	Annual Gross Income*	Monthly Gross Income*
1	\$63,975.00	\$5,331.25
2	\$83,660.00	\$6,971.67
3	\$103,343.33	\$8,611.95
4	\$123,028.33	\$10,252.37
5	\$142,711.67	\$11,892.63
6	\$162,396.67	\$13,533.05
7	\$166,086.67	\$13,840.55
8	\$169,778.33	\$14,148.20
9	\$173,468.33	\$14,455.70
10	\$177,160.00	\$14,763.33
11	\$180,850.00	\$15,070.83
12	\$184,541.67	\$15,378.47
Each Additional Member Add	\$3,691.67	\$307.63

* Gross Income means all household income before any deductions or taxes