



Oregon Home Energy Rebate Programs Orientation

**For Contractors and
Community-Based
Organizations**



Orientation Agenda

- 1 Welcome & Overview**
- 2 Enrollment Steps**
- 3 Allowable Upgrades**
- 4 Customer Journey**
- 5 Project Documentation**
- 6 Quality Assurance/Control**
- 7 Resources & Support**
- 8 Wrap Up & Close**

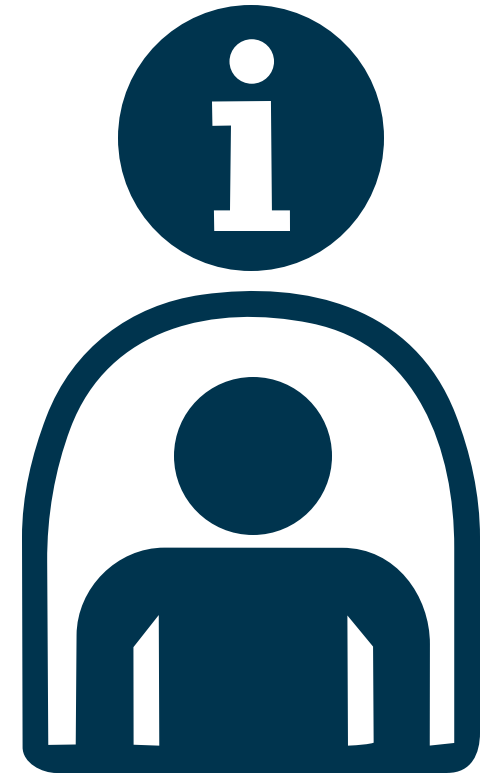


Deep Dive Learning Modules

3- to 5-minute videos available via the Learning Management System (LMS)

Indicated via the icon throughout the presentation

On-demand content encouraged for review following the orientation and as an ongoing resource



Deep Dive icon:
Look for this icon in
this orientation

Acronyms

AMI	Area Median Income
CBO	community-based organizations
COU	consumer-owned utilities
HEAR	Home Electrification and Appliance Rebates
HES	Home Energy Score
HOMES	Home Efficiency Rebates
IOU	investor-owned utilities
LMS	learning management system
ODOE	Oregon Department of Energy
RMS	rebate management system
TA	trade allies

**Acronyms PDF resources available for reference*

1

Welcome & Overview



Orientation Topics and Goals

- Describe the background and purpose of the programs.
- Identify the differences between various roles and pathways for contractors, community-based organizations and customers.
- Summarize how this orientation connects to necessary training for completing the enrollment process.
- List the key project requirements and be able to interpret eligibility guidelines for different customers.
- Outline the steps in a typical customer journey.
- Describe the systems and processes for submitting a project.
- Define incentive stacking/braiding.
- Summarize project support services and program contacts.

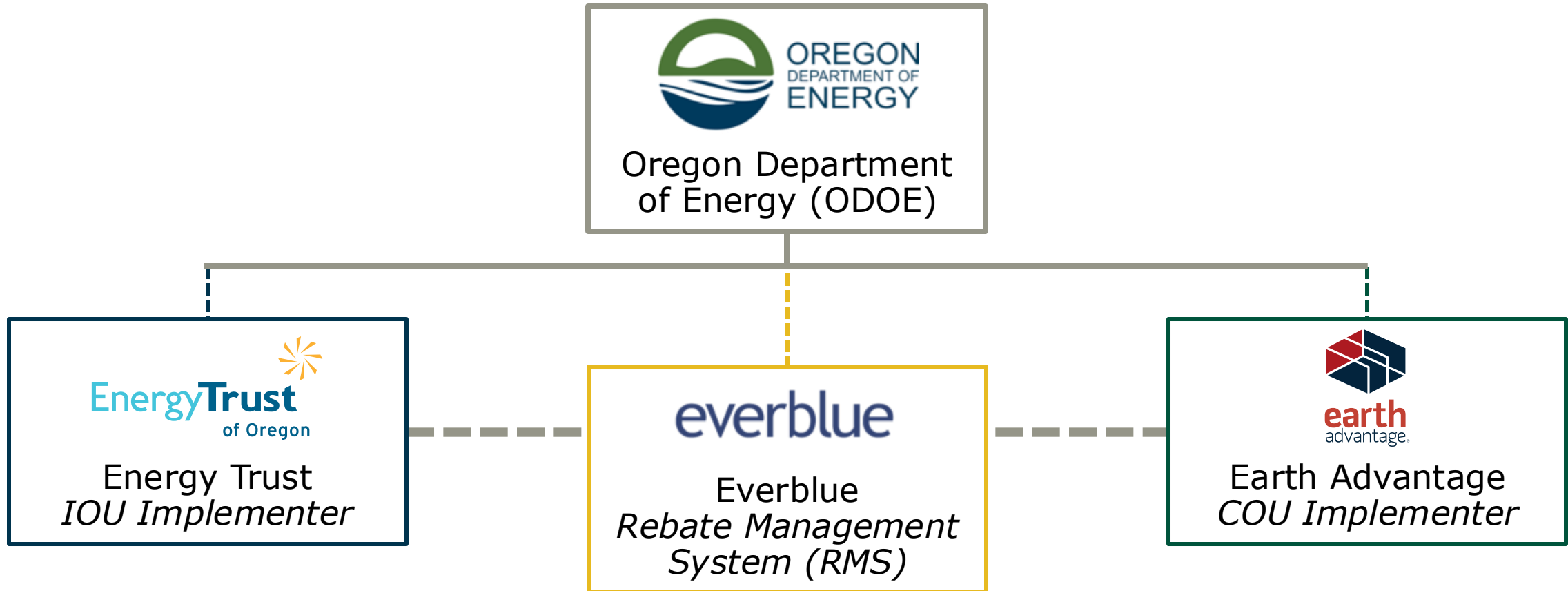
Program Purpose

“ The Oregon Department of Energy (ODOE) was awarded **over \$113 million** from the U.S. Department of Energy for **two new home energy rebate programs** that will provide financial incentives to single-family and multifamily households for eligible high-efficiency home improvements, appliances, and equipment. These programs are known as the **Home Efficiency Rebates Program** and the **Home Electrification and Appliance Rebates Program**, or **HOMES and HEAR**, respectively. ”

Funding for these programs comes to Oregon thanks to the 2022 Inflation Reduction Act (IRA).

Source: [State of Oregon: INCENTIVES - Home Energy Rebate Programs](#)

Program Implementers



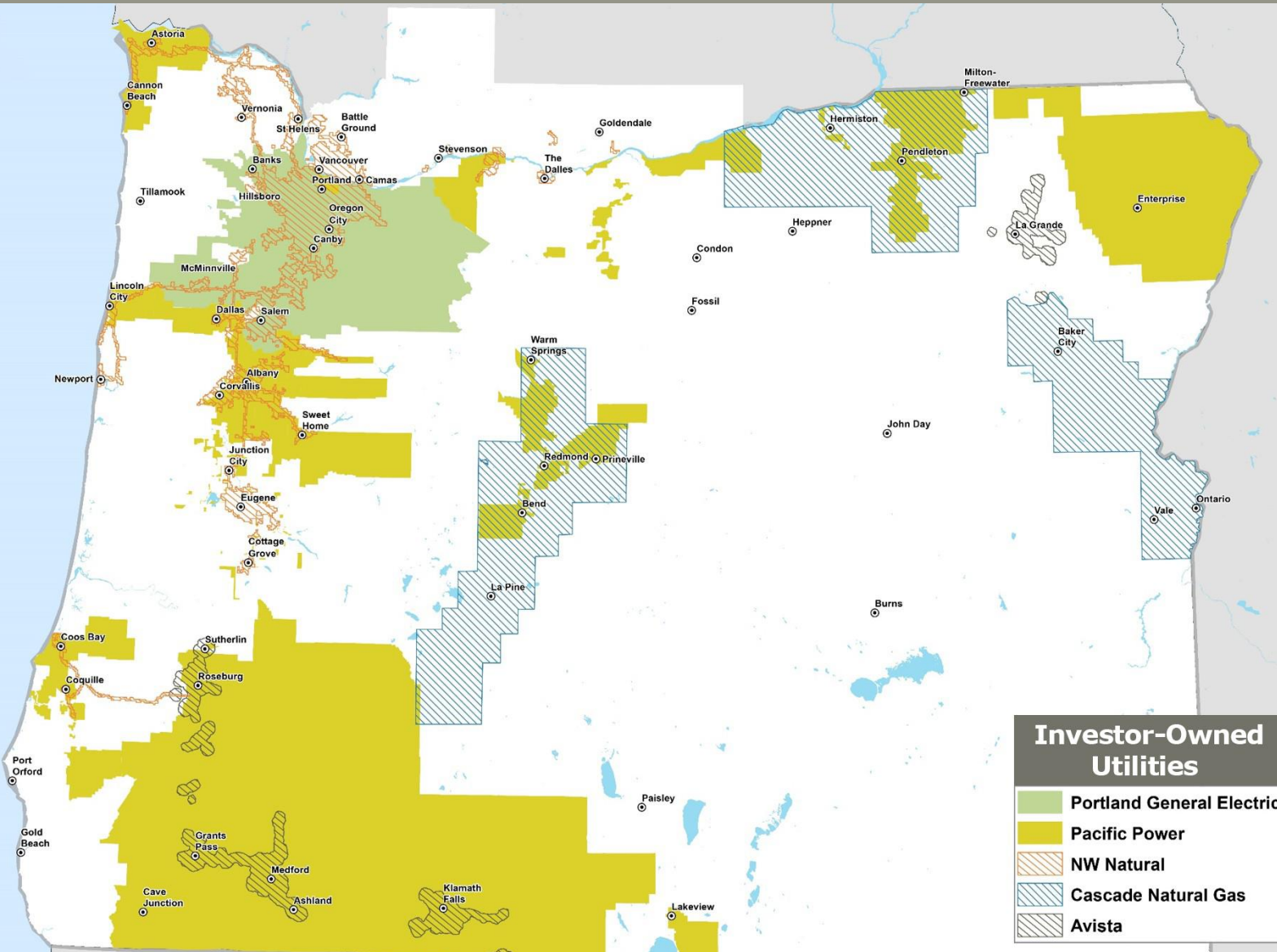
NOTE: There are slight differences between investor-owned utilities (IOU) territories and consumer-owned utilities (COU) territories.

Investor-Owned Utility Territory

Investor-Owned Utility service territory (PGE, Pacific Power) will be handled by Energy Trust.

Consumer-Owned Utility service territory will be handled by Earth Advantage.

Areas that overlap will be sorted by electric utility.



Eligible Property Types

Detached Residential	Attached Residential	Large Multifamily
Detached single-family homes	Side-by-side (townhomes, rowhouses)	Multifamily buildings or individual apartments/condos in low, mid, or high-rise buildings
		
Manufactured homes	Duplexes, triplexes, fourplexes	
		

Key Terms – Property Types

Property Types:

- **Single-family Dwelling Units:** Homes **do not share** heating, cooling, ventilation, or water heating with other homes.
 - Detached homes
 - Side-by-side multifamily units (townhomes and rowhomes)
 - Manufactured homes
 - Accessory dwelling units (ADUs)



Key Terms – Property Types

Property Types:

- **Multifamily Building*:** A whole building project benefiting multiple dwelling units (such as central heating, cooling, or domestic hot water) within a multifamily or commercial mixed-use property.
- **Side-by-Side Multifamily Unit*:** An individual dwelling unit that shares at least one wall with another home that may, or may not, share heating, cooling, ventilation, or water heating with other homes.
- **Stacked Multifamily Unit*:** An individual dwelling unit within a low, mid, or high-rise building that shares at least one wall, ceiling, and/or floor with another unit and may, or may not, share a heating, cooling, ventilation or domestic hot water system with other units.

*Rebates for multifamily buildings, side-by-side multifamily units *that share mechanical systems*, and stacked multifamily units will be available in a future phase.



Program Requirements

Determine customer eligibility

- Both HOMES and HEAR require eligibility verification (income, ownership, identity)

Closed Trade Ally network

- Customers must work with an Oregon home energy rebate programs Enrolled Contractor

Complete Home Energy Assessment

- Full energy model (HOMES)
- Home Energy Assessment (HEAR) for heat pumps only

Rebate reservations

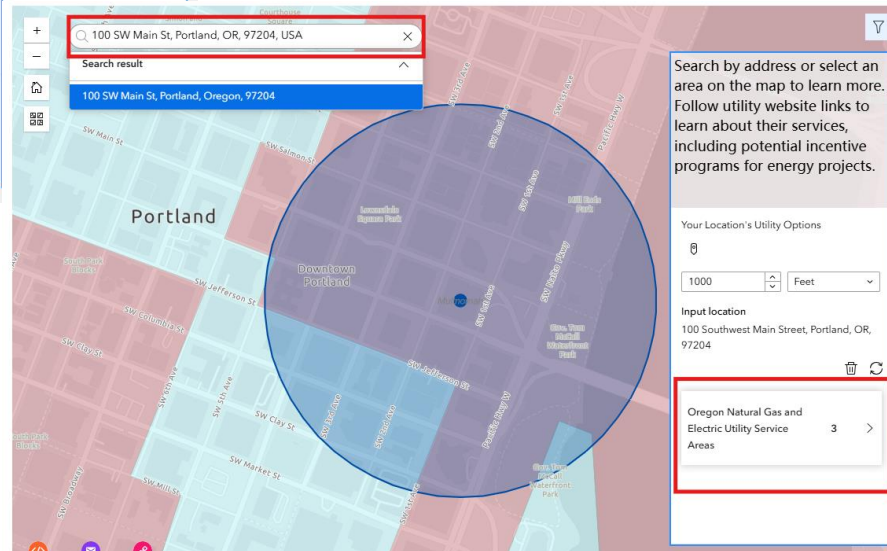
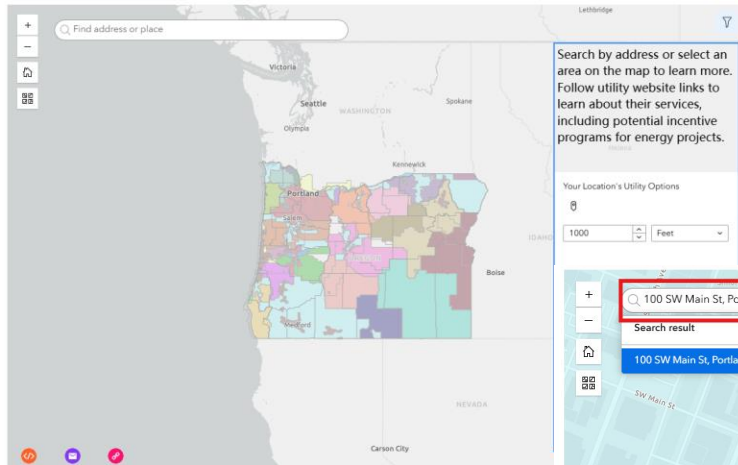
- Energy Trust issues coupons and reservations
- Expire after 180 days
- Reimbursements issued within 4 weeks of receipt of required and acceptable information

Documentation for submission

- Geo-tagged photo documentation
- Incentive application
- Invoice
- Energy model and/or assessment (depending on project)

Find Your Utility

Oregon Department of Energy's Find your utility page ([link](#)) can help contractors and customers identify which utilities are onsite and which sites sort to each implementor.



Activity

Find your utility [link](#)

Walk through how to find your utility as an example for how to sort for which implementer – first step in the project process

Inform and educate contractors on this tool which could be shared with customers

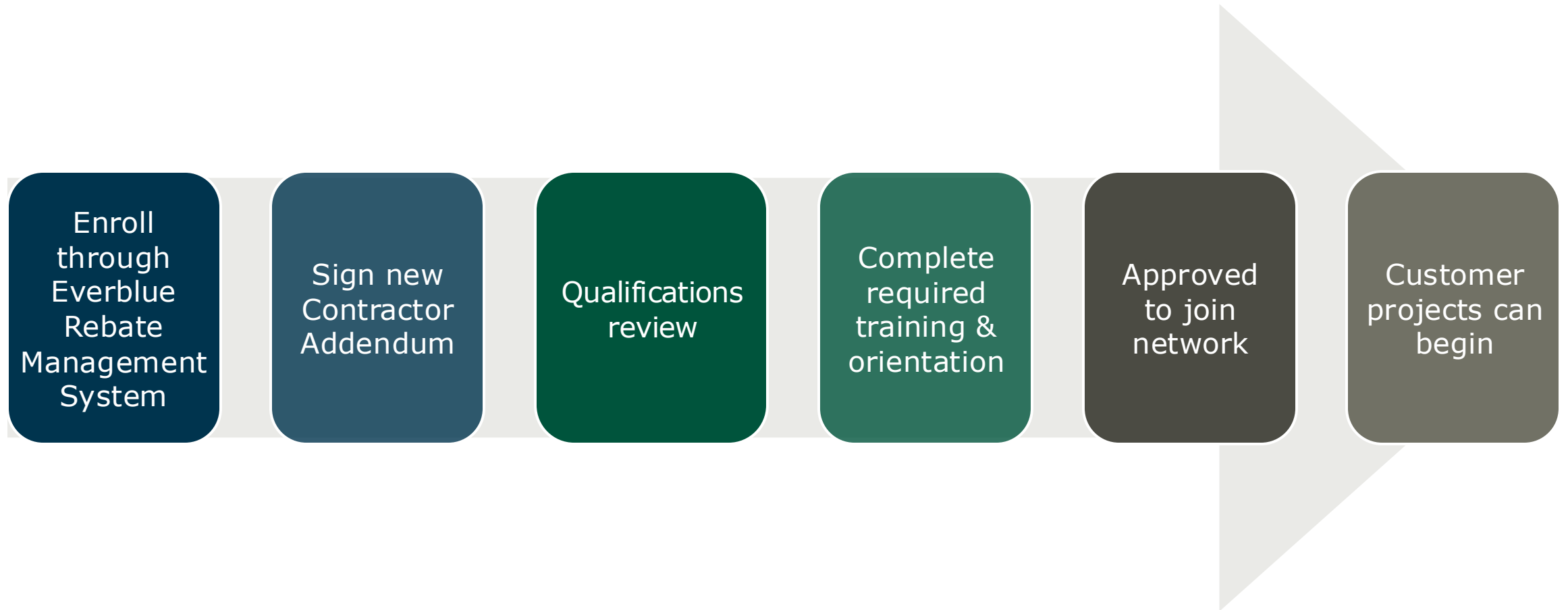


2

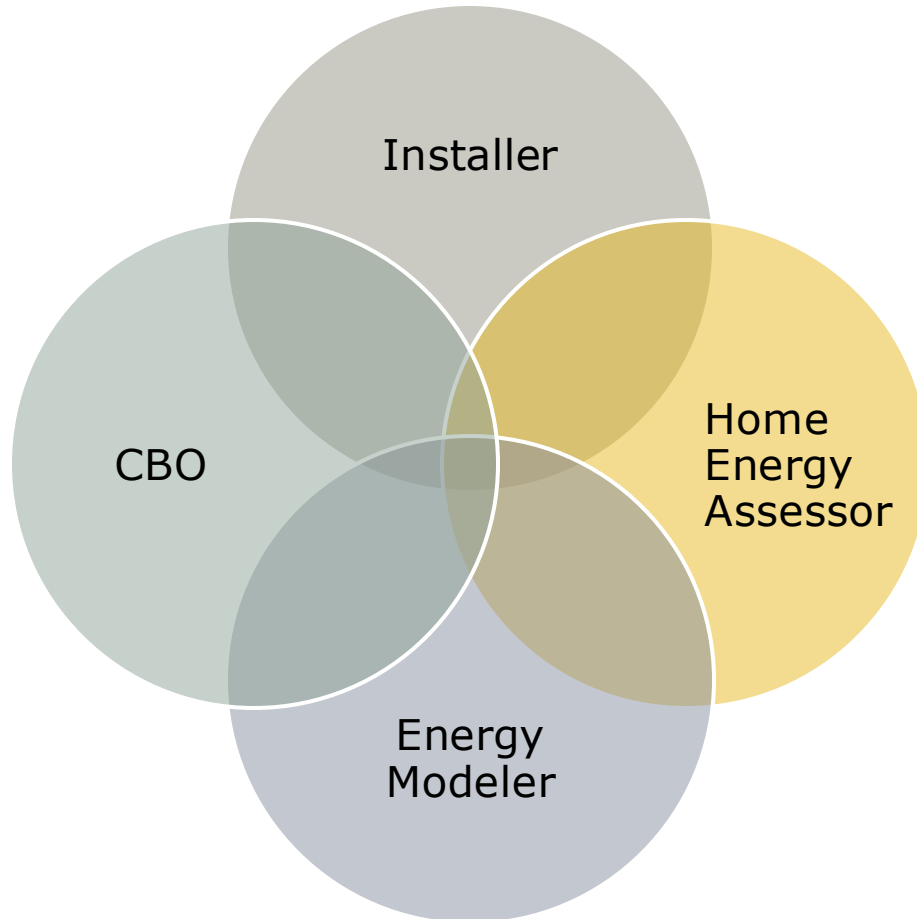
Enrollment Steps



Your enrollment has begun!



Pathways to Participate



- Closed networks
- No participation cap
- Training and resources provided for each
- Can participate in any or all



Pathway Definitions and Roles

Installer

- Contractor focused on quality installations
- Includes primary and supporting installers
- Creates the project proposal and scope
- Works closely with home energy assessor and/or modeler (depending on type of project)

Home Energy Assessor

- Performs home energy score assessments and scoring
- Works closely with the energy modeler

Energy Modeler

- Conducts energy modeling and assembles work scope
- Uses BPI-2400 compliant software for the models
- Works closely with home energy assessor



Contractor Roles: Primary vs. Supporting

Primary (General)

- Responsible for the work of supporting contractors and flow down of program requirements
- Payee of the project
- Required to register through the Everblue RMS

Supporting (Subcontractor)

- Contributors to a project
- Does not act as payee
- Not required to register through the Everblue RMS
- Must contract through a primary contractor

Community-Based Organization (CBO) Roles

Energy Trust CBO

- Referral CBO: Performs outreach in its community for the programs
- Program Delivery partner performs the following roles:
 - Income verification, project scoping and management, and contracting support
 - May also perform home energy assessments and/or energy modeling

Earth Advantage CBO

- Community outreach and engagement
- Customer qualification
- Project scoping and management
- Energy assessments and modeling (modeling optional)
- Contractor engagement and coordination
- Data collection and feedback

3

Allowable Upgrades



HOMES Eligible Measures

Home Efficiency Rebates Program (HOMES)

- Performance-based rebates for energy efficiency upgrades in existing single-family and multifamily homes.
- The HOMES program does not specify the types of upgrades that qualify; however any approved upgrades must be able to demonstrate a minimum of 20% energy savings.

Common examples of upgrades eligible for HOMES rebates include:

- Envelope improvements
 - Insulation
 - Air sealing
 - Replacement windows/exterior doors
- HVAC
 - Whole system replacements
 - Duct repair/sealing
- Water heating
 - Gas tank and tankless
 - Electric heat pump

HOMES Ineligible Measures

Energy Saving Measures

- Lighting upgrades
- Water-saving devices
- Appliances (for select electrical appliances, see HEAR)
- Solar/photovoltaics

Non-Energy Saving Measures

- Structural (e.g., roof/siding repair, mold/asbestos remediation)
- Thermostat (if only HVAC component addressed)
- Work completed as part of a home addition
- Non-replacement windows, skylights
- Behavioral
- Optimization settings (water heat temperature, thermostat set points)

HOMES Installation Incentives

\$200 per eligible single-family site or multifamily unit.

Offered for homes that are in areas where high percentages of the population are:

- Living at or below 150% of the federal poverty line
- Experiencing a high energy burden

Informed by Northwest Clean Energy Atlas

Interactive map will be available on program website: www.nwceatlas.org/visualization/poverty-and-energy-burden



HOMES rebate eligibility: Single-family

Modeled Savings	Income Level	Single-Family Rebates
20%-34%	Low-Income	100% of project cost up to \$8,000
	Moderate- and Higher-Income	50% of project cost up to \$2,000
35% or greater	Low-Income	100% of project cost up to \$10,000
	Moderate- and Higher-Income	50% of project cost up to \$4,000

Income levels are determined by Area Median Income (AMI) which is established by the U.S. Department of Housing and Urban Development for the most recent tax year. Low-income is considered making less than 80% of AMI, while moderate-income is considered making between 80-150% of AMI.



HOMES rebate eligibility: Multifamily

Modeled Savings	Income Level	Multifamily Building Rebates
20%-34%	Low-Income	100% of project cost up to \$8,000 per unit
	Moderate- and Higher-Income	Up to \$2,000 per unit up to \$200,000 per building
35% or greater	Low-Income	100% of project cost up to \$10,000 per unit
	Moderate- and Higher-Income	Up to \$4,000 per unit up to \$400,000 per building



HOMES Project Examples

Modeled Energy Savings %

20% ----- 35%

Example #1

- Energy assessment
- Air sealing

Example #2

- Energy assessment
- Air sealing
- Duct sealing
- Attic insulation

Example #3

- Energy assessment
- Air sealing
- Duct sealing
- Attic insulation
- Heat pump

Example #4

- Energy assessment
- Air sealing
- Duct sealing
- Attic insulation
- Heat pump
- Gas tank water heater
- Installation incentive eligible

Available Rebates

\$ ----- \$\$\$

HOMES Retroactivity Requirements

Retroactive rebates must still comply with all program requirements including:

1. One of the following program-approved energy models was completed after August 16 and within [X amount of time] before installation:
 - Home Energy Score was generated by an authorized [Oregon Home Energy Assessor](#)
 - Calibrated BPI-2400 compliant energy model from an [approved modeling tool](#)
2. Rebate-eligible installations must have occurred after the program-approved assessment was completed.
3. **All** organizations involved must be enrolled and approved in their required program role at the time of retroactive submission.

NOTE: No retroactive rebates are available for the HEAR program.

Home Electrification and Appliance Program (HEAR)

HEAR provides rebates to low- and moderate-income households to install specific eligible high-efficiency electric appliances and associated upgrades.

Qualified Product/Measure per Project	Rebate Limit
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
Electric Load Service Center	\$4,000
Insulation, Air Sealing and Ventilation	\$1,600
Electric Wiring	\$2,500
Maximum Rebate	\$14,000

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

HEAR Program General Requirements

- All electric appliances must be ENERGY STAR rated.
- Upgrade cannot be included in HOMES model to be eligible for HEAR rebate.
- Insulation, ventilation and air sealing measures are eligible only for electrically heated homes.
- Heat pumps require a Home Energy Assessment before installation.
- Heat pumps may replace or supplement any existing HVAC system; however, HEAR funds CANNOT be utilized for any costs associated with the removal of fossil fuel furnaces.
- If minimum insulation/air sealing levels are not met, they must be added to the heat pump project scope (see *Technical Specifications Manual*).
- Electric wiring or load center upgrades are eligible only when paired with a qualifying HEAR upgrade.
- Warranties and accessories are rebate-eligible (see *Warranties & Accessories* document).

HEAR Installation Incentives for Contractors and CBOs

Offered per measure up to \$500 per eligible single-family or multifamily unit.

Oregon will use the federal maximum incentive amounts allowed for qualifying installation activities, as defined in the program guidance shown in chart to the right.

Qualifying Activity	Incentive
Installation was facilitated by a program-approved CBO or benefits a tribal member	\$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	\$250
Maximum incentive per project	\$500

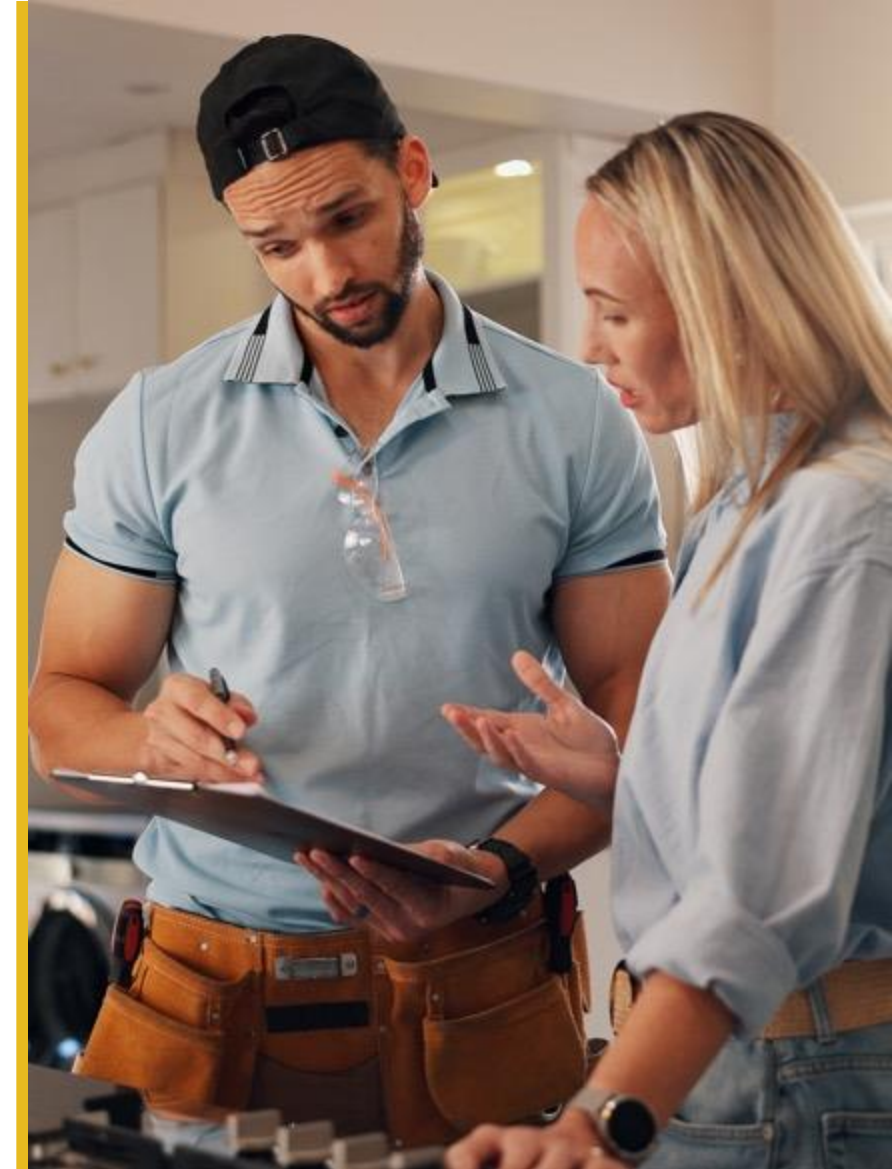
Additional Funding Definitions

Braiding: HOMES and HEAR funds being applied to the same project. Must be applied to different measures.

Stacking: External funding (ODOE, Energy Trust, Utility, Manufacturer rebates) being applied to the same project. May be applied to the same measure.

Program representatives are available to assist you in applying the appropriate rebates during the proposal phase.

Examples to follow in Project Documentation section.

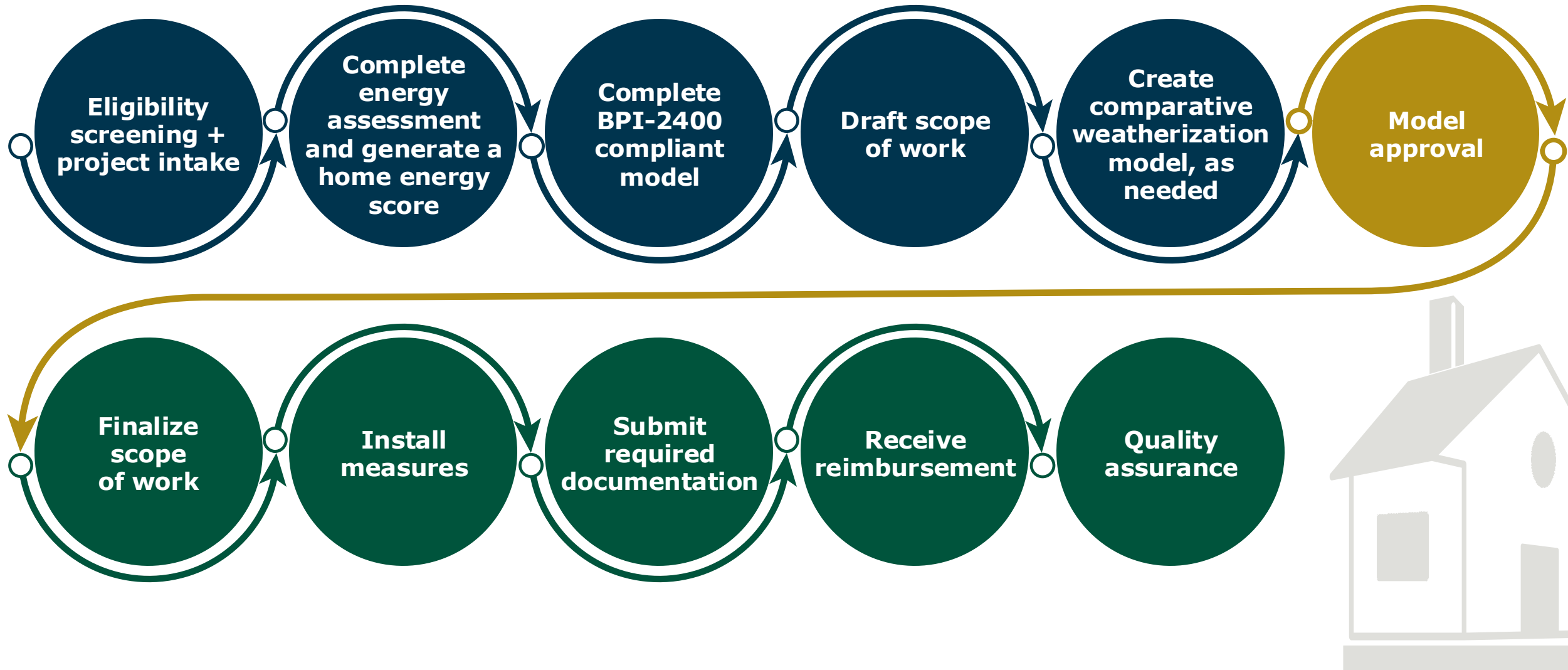


4

Customer Journey



HOMES Project Workflow



Program Support with Customer Conversations

- Income qualification
- Housing type eligibility
- Utility bill information
- Determining best combination of HOMES or HEAR measures and funding
- Identify energy assessment approach
- EverServe Rebate Management System (RMS) project tracker from Everblue
- Referral to alternative programs pending eligibility
- Providing marketing pieces for clarification





How are customers protected?

- Contractor enrollment and screening
- Installation quality assurance
- Customer feedback process
- Complaint process
- Additional renter protections
- Removal of underperforming contractors

A one-pager of information will be available to customers with more details.



Customer Feedback Process

Customers have feedback opportunities along the way and at project completion

- Customer satisfaction surveys
- Direct feedback to contractors, outreach staff and community partners
- Direct feedback to program implementers

Feedback is used to

- Identify process improvements
- Determine training needs
- Determine contractor participation
- Resolve disputes
- Improve customer experience for future participants

5

Project Documentation





Rebate Reservation/Proposal Documents

Energy Model Files:

- ✓ Snugg Pro Savings Report (Required for HOMES projects)*
- ✓ HPXML 4.0 via Snugg Pro (Required for HOMES projects)*
- ✓ Snugg Pro Comparative Savings Report (inclusive of all envelope improvements)*
- ✓ Home Energy Score Assessment (All HOMES projects, HEAR projects that contain a heat pump)

**If a model cannot be calibrated due to lack of 12 months of customer utility data, Snugg Pro reports may be excluded. An attestation describing the reason this data was not obtainable will be presented during the RMS submission.*



Rebate Reservation/Proposal Documents (cont'd.)

- ✓ Detailed Project Proposal/Scope of Work
- ✓ Home Energy Score Utility Bill Impact Statement (signed by customer)
- ✓ Pre-installation photos and required data points of equipment/areas to be upgraded (existing equipment and/or conditions)

Rebate Redemption/Final Documents

- ✓ Final invoice (must match approved proposal/scope of work)
- ✓ Geotagged post-installation photos and data points of equipment/areas that were upgraded (existing equipment and/or conditions)
- ✓ Safety Test Results
- ✓ Completion certificate (HOMES only)



Proposals and final invoices must be offered as instant discounts (payments cannot go to customers) and contain:

- ✓ Installation address
- ✓ Installation date
- ✓ Customer name (affiliated with income verification)
- ✓ Line-item costs per upgrade
- ✓ Labor costs per upgrade
- ✓ Make and model numbers (geotagged photos with this info is an acceptable substitute)
- ✓ Other projects costs as applicable (permitting)
- ✓ Deduction of HOMES, HEAR or external funding (Reminder: program staff will assist with this step at the proposal submission phase)

Proposal Example #1 – Part 1

Metrics

ABOUT THE METRICS

These metrics are for the whole house in a pre and post-retrofit state.

The 'Base' savings numbers will likely not be the same as the actual energy consumption of the home. These numbers are weather normalized and then projected based on the 30 year weather normals data from NOAA. In other words, this is the modeled energy consumption of the home for a typical year, not the year that the utility bills were from.

FUELS	BASE	IMPROVED	SAVED
Total Fuel Energy Usage <i>therms/year</i>	0	0	0

[View detailed usage →](#)

METRIC	BASE	IMPROVED	SAVED
Electric Energy Usage <i>kWh/year</i>	15,946	11,301	4,645
Total Energy Usage <i>MMBtu/year</i>	54.42	38.57	15.85
Fuel Energy Cost <i>\$/year</i>	\$ 0	\$ 0	\$ 0
Electric Energy Cost <i>\$/year</i>	\$ 2,424	\$ 1,718	\$ 706
Total Energy Cost <i>\$/year</i>	\$ 2,424	\$ 1,718	\$ 706
CO2 Production <i>Tons/year</i>	5.5	3.9	1.6

Payback <i>years</i>	7
Total Energy Savings	29.13%
Total Carbon Savings	29%
Net Savings to Investment Ratio <i>SIR</i>	2.0
Net Annualized Return <i>MIRR</i>	9.0%

HEATING & COOLING LOAD CALCULATIONS

Heating Load <i>Btu/hr</i>	Base: 25,061	Improved: 22,847
Cooling Load: Sensible <i>Btu/hr</i>	Base: 28,178	Improved: 24,699
Cooling Load: Latent <i>Btu/hr</i>	Base: 1,164	Improved: 1,164
Winter Design Temperature	Outdoor: 32°	Indoor: 70°
Summer Design Temperature	Outdoor: 88°	Indoor: 75°

Proposal Example #1 – Part 2



- HEAR rebates can be braided with HOMES projects for low- to moderate-income households for qualified upgrades not included in the energy model.
- Program staff will support you to ensure the lowest out of pocket cost to customer.



ACME GENERAL
CONTRACTING
123 MAIN ST SE
SALEM, OR 97306
541-123-0098

PROPOSED INSTALLATION DATE:
November 17th, 2026

ORDER #
00728

SCOPE OF WORK

TO:

Lenny Pearl
1155 Market St NE
Salem, OR
123-456-7890

ENERGY UPGRADE	DESCRIPTION	AMT
Home Energy Audit	Modeled assessment w/ blower door test	\$1,200
Attic Insulation	Remove R4 fiberglass batts & install 1,100 sq ft of R49 cellulose to attic floor	\$1,800
Whole Home Air Sealing	Spray foam/caulking applied to attic and basement gaps	\$1,300
Heat Pump	Trane RQS 4TXD2036A10NUA (AHRI #208141270) backing up an 80% AFUE gas furnace	\$14,500
	TRANE SPRING PURCHASE SPECIAL	-\$200
Electrical Panel (Performed by supporting contractor)	Panel upgrade from 100 to 200 amps	\$3,700
Cost of Proposed Work Before Rebates.....		\$22,300



Scope of Work Example #2



- Program staff are available to help identify all rebate stacking and braiding opportunities and apply them to your proposal to present to the customer for signature.
- More scenarios will be available in the *Preparing Scopes of Work and Invoicing* deep dive following the orientation.



ACME GENERAL
CONTRACTING
123 MAIN ST SE
SALEM, OR 97306
541-123-0098

SCOPE OF WORK

ANTICIPATED INSTALLATION DATE:
November 17th, 2026

TO:

Lenny Pearl
1155 Market St NE
Salem, OR
123-456-7890

ORDER #
00728

ENERGY UPGRADE	DESCRIPTION	AMT
Home Energy Audit	Home Energy Assessment w/ blower door & duct testing. Snugg Pro energy savings report. Home demonstrated 17% modeled savings.	\$1,000
	Energy Trust Home Energy Assessment Incentive	-\$400
	Energy Trust BPI-2400 Software (Snugg Pro) Modeling Incentive	-\$200
	Energy Trust Blower Door Test Incentive	-\$150
	Energy Trust Duct Testing Incentive	-\$250
	Home energy audit total	\$0
Attic and Floor Insulation	1,100 sq ft of R49 cellulose to attic floor	\$1,800
	Attic insulation labor cost (R4 fiberglass batt removal, cellulose installation to attic floor)	\$1,000
	1,100 sq ft of R-30 batt insulation to floor cavity	\$1,000
	Floor insulation labor cost	\$2,600
	Energy Trust Attic Insulation Incentive (\$1.50/sq ft)	-\$1,650
	Energy Trust Floor Insulation Incentive (\$1.00/sq ft)	-\$1,100
	Attic and Floor insulation after rebates	\$3,650
Whole Home Air Sealing	Spray foam/caulking applied to attic and basement gaps	\$1,100
	Air sealing labor cost	\$1,400
	HEAR eligible	-\$1,600
	Air sealing total	\$900
Heat Pump	Trane RQS 4TXD2036A10NUA (AHRI #208141270) equipment cost	\$13,000
	Heat pump labor cost	\$1,300
	ACME FALL HVAC SPECIAL	-\$200
	HEAR eligible	-\$8,000
	Removal of 80% AFUE gas furnace labor cost (not eligible for HEAR reimbursement)	\$500
	Heat pump total	\$6,600
Electrical Panel (Performed by supporting contractor)	Panel upgrade from 100 to 200 amps	\$3,000
	Electrical panel labor cost	\$1,500
	Electrical permit cost	\$200
	HEAR eligible	-\$4,000
	Electrical panel total	\$700
Estimated Cost.....		\$11,850



Invoice Example



- Final invoice must match approved scope of work. Change orders allowable, but subject to another round of review and model adjustment if applicable.



ACME GENERAL
CONTRACTING
123 MAIN ST SE
SALEM, OR 97306
541-123-0098

FINAL INVOICE

INSTALLATION DATE:
November 17th, 2026

ORDER #
00728

TO:

Lenny Pearl
1155 Market St NE
Salem, OR
123-456-7890

ENERGY UPGRADE	DESCRIPTION	AMT
Home Energy Audit	Home Energy Assessment w/ blower door & duct testing. Snugg Pro energy savings report. Home demonstrated 17% modeled savings.	\$1,000
	Energy Trust Home Energy Assessment Incentive	-\$400
	Energy Trust BPI-2400 Software (Snugg Pro) Modeling Incentive	-\$200
	Energy Trust Blower Door Test Incentive	-\$150
	Energy Trust Duct Testing Incentive	-\$250
	Home energy audit total	\$0
Attic and Floor Insulation	1,100 sq ft of R49 cellulose to attic floor	\$1,800
	Attic insulation labor cost (R4 fiberglass batt removal, cellulose installation to attic floor)	\$1,000
	1,100 sq ft of R-30 batt insulation to floor cavity	\$1,000
	Floor insulation labor cost	\$2,600
	Energy Trust Attic Insulation Incentive (\$1.50/sq ft)	-\$1,650
	Energy Trust Floor Insulation Incentive (\$1.00/sq ft)	-\$1,100
	Attic and Floor insulation after rebates	\$3,650
Whole Home Air Sealing	Spray foam/caulking applied to attic and basement gaps	\$1,100
	Air sealing labor cost	\$1,400
	HEAR eligible	-\$1,600
	Air sealing total	\$900
Heat Pump	Trane RGS 4TXD2036A10NUA (AHRI #208141270) equipment cost	\$13,000
	Heat pump labor cost	\$1,300
	ACME FALL HVAC SPECIAL	-\$200
	HEAR eligible	-\$8,000
	Removal of 80% AFUE gas furnace labor cost (not eligible for HEAR reimbursement)	\$500
	Heat pump total	\$6,600
Electrical Panel (Performed by supporting contractor)	Panel upgrade from 100 to 200 amps	\$3,000
	Electrical panel labor cost	\$1,500
	Electrical permit cost	\$200
	HEAR eligible	-\$4,000
	Electrical panel total	\$700
Total Cost to Customer		\$11,850



6

Quality Assurance / Control



Rates & Process

The Oregon home energy rebate programs Installation Manual is available as a resource for program requirements

- Separate training with more details for installers

Minimum inspection rates

- First five projects of each contractor will be inspected
 - For any existing Energy Trust contractor, this requirement is waived
- Subsequently, minimum of 5% of projects will be inspected
- Combination of in-person and virtual

Payment and process

- Upon QA pass, or a completed corrective action, project will proceed to payment.
- 28-day payment SLA

7

Resources & Support



[Oregon Home Energy Rebate Programs HUB by ODOE](#)

- Updates & Announcements

[ODOE resources center landing page](#)

- FAQs
- Fact sheets
- Enrollment materials
- Energy Modeling Best Practices Guide
- Marketing tools
- Project portal access





- **Preparing Proposed Scopes of Work & Invoices**
- **Property Owners & Rentals**
- **Customer Protections**
- **Documentation Specifics**

Accessible via the LMS

Access following orientation



Program support can help with...

General project support

Invoice review

- Stacking or braiding of funds

Energy model review

Navigating which participation pathway makes the most sense for your business



Resources to help you navigate programs

Contractor Center

No rebates are currently available. When the programs launch, most projects must be completed by contractors enrolled and trained in the program to receive a rebate. This creates an opportunity to grow your business through program referrals.

Contractor enrollment will open shortly after ODOE receives U.S. Department of Energy approval to launch the programs. [Sign up now](#) to receive program updates and be notified when contractor enrollment opens.

JOIN OUR MAILING LIST

Why Become an Enrolled Contractor?

Becoming an Enrolled Contractor is a great way to stay ahead of industry trends and support market transformation as new, more efficient technologies become available. Additionally, by participating the program you can:

- Grow your business through referrals for program eligible projects.
- Receive access to specialized training in energy efficient system and equipment installation practices.
- Help Oregonians -- especially those with limited resources -- improve energy efficiency, affordability, and comfort in their homes.



Image Courtesy of Energy Trust of Oregon

8

Wrap Up & Close



Learning Objectives Review

- Understand the background and purpose of the programs
- Understand the differences between various roles and pathways for contractors, CBOs and customers.
- Summarize how this orientation connects to necessary training for completing the enrollment process
- List the key project requirements and be able to interpret eligibility guidelines for different customers
- Outline the steps in a typical customer journey
- Understanding the systems and processes for submitting a project
- Awareness of incentive stacking/braiding
- Awareness of project support services and program contacts

Next steps in your enrollment journey

Determine your participation pathway(s)

- Installer
- Assessor / Modeler (includes any CBO acting in this way)
- CBO General Staff

Complete remaining trainings and deep dives

- Dependent on pathway

Stay in the loop

**Join the Oregon home energy rebate programs email list.
We'll share updates like:**

- Presentation slides
- Enrollment details
- Key dates
- Training opportunities

Scan to sign-up





Thank you

Contact Information

ORHomeEnergyRebate@earthadvantage.org

contact@energytrust.org

1.888.803.7914

