



OREGON  
DEPARTMENT OF  
ENERGY

# Oregon Home Energy Rebates Programs

October 17, 2024





# OREGON DEPARTMENT OF ENERGY

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

## Our Mission

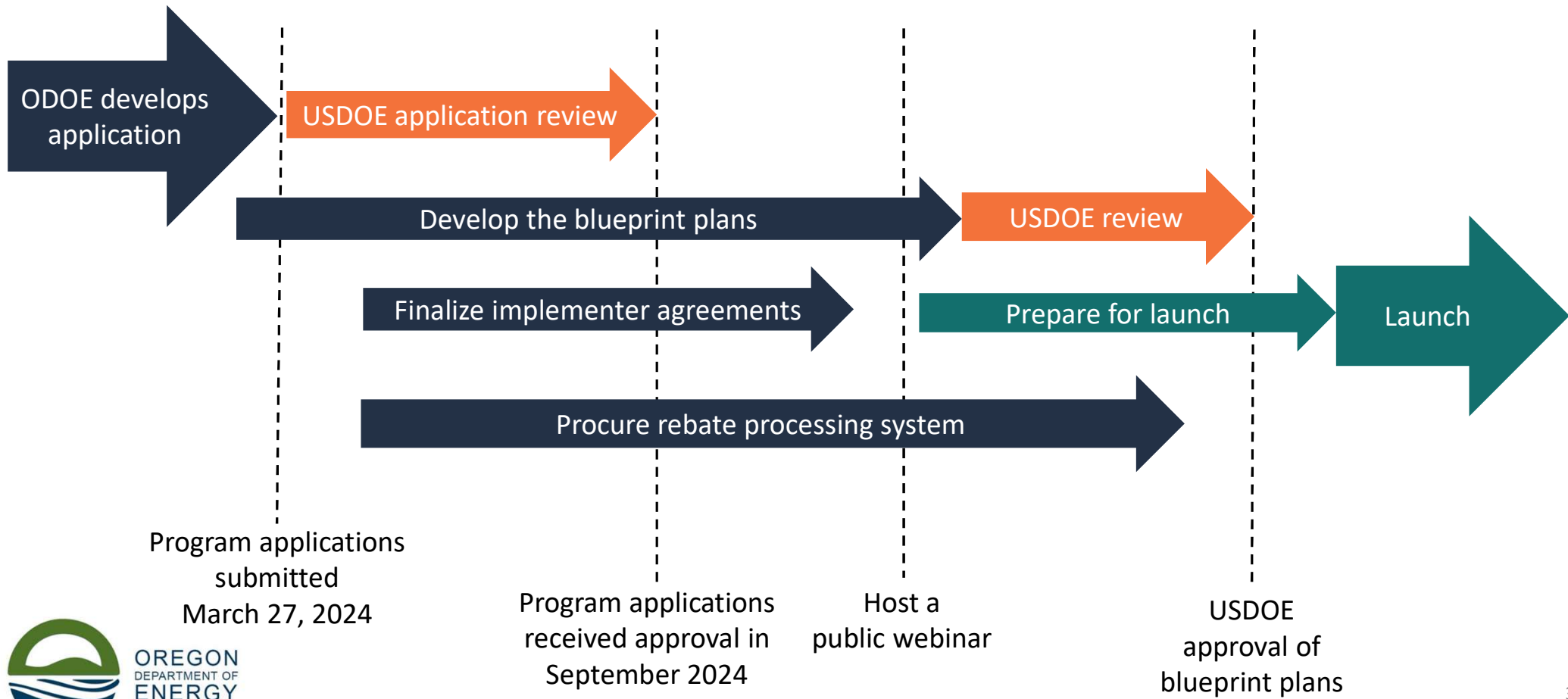
The Oregon Department of Energy helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and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

# CURRENT TIMELINE





On January 27, 2021, President Biden signed Executive Order 14008, which set forth prioritizing actions to tackle the climate crisis. Included was the Justice40 Initiative, which directs that **40% of the benefits of certain federal investments flow to communities that are marginalized, underserved, and overburdened.**

The Home Energy Rebates programs fall under the Justice40 Initiative, and it is ODOE's intent to achieve those goals with these rebates in Oregon.

- Defined by the Council on Environmental Quality
- Overburdened and Underserved
- Census Tracts
- Tribes
- Climate and Economic Justice Screening Tool (CEJST)

# HOMES: HOME EFFICIENCY REBATE PROGRAM

## Performance-based home energy efficiency rebate program

- Through an energy assessment and model, must demonstrate at least **20% energy savings** to be eligible for rebates.
  - Larger rebates are available for households that model savings of 35% or more.
- Funding set-asides for low-income households and low-income multifamily properties.
- USDOE requires retroactivity for projects initiated after August 16, 2022. Projects must still meet all program requirements.





# HOMES REBATE LIMITS: SINGLE-FAMILY

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



# INCOME CATEGORIES

- Area Median Income (AMI) is calculated by household size and county.
  - For a summary of all counties, see the Excel spreadsheet under “AMI Tables” here: <https://www.pnnl.gov/projects/rebate-tools>
- For rental properties, the income status is established using the annual household income of the tenant(s).
- For multifamily buildings to qualify for low-income rebate levels, the building must have at least 50% of households with incomes less than 80% AMI.

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

# HOMES REBATE LIMITS: MULTI-FAMILY

Savings Estimate	Income Level	Multi-Family Rebates
20%-34%	Low-Income	Lesser of \$8,000 per unit, or 100% of cost
	Moderate- and Higher-Income	Lesser of \$2,000 per unit, up to \$200,000 per building
35% or greater	Low-Income	Lesser of \$10,000 per unit, or 100% of cost
	Moderate- and Higher-Income	Lesser of \$4,000 per unit up to \$400,000 per building





# HEAR: HOME ELECTRIFICATION AND APPLIANCE REBATE PROGRAM

## Income restricted, point-of-sale rebate program

- Point-of-sale rebate program for installation of high efficiency electric appliances, associated electric upgrades, as well as insulation and air sealing.
- For low-income and moderate-income households only.
- USDOE does not allow retroactivity.
- Rebates for an electric heat pump for space heating & cooling require an energy assessment.



# 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
Maximum Rebate		\$14,000

# REBATE FUNDING ALLOCATIONS

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**HOMES:** Minimum of \$45.8 million available for rebates & incentives

- Low-Income allocation: At least 40%
- Low-Income multi-family allocation: At least 10%
- Funding set aside for Justice40 incentives & low-income audits

**HEAR:** Minimum of \$45.6 million available for rebates & incentives

- Low-Income allocation: At Least 60%
- Low-Income multi-family allocation: At Least 20%
- Funding set aside for contractor & Justice40 incentives



# PROPOSED DESIGN & IMPLEMENTATION DETAILS

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- Engage two implementers:
  - Energy Trust of Oregon to implement in investor-owned utility areas
  - ODOE will issue an RFP for consumer-owned utility and Idaho Power areas
- Issue an RFP to procure a rebate processing & tracking system
- Streamline the minimum efficiency standards between the two programs
- In Portland, prioritize multifamily and J40 communities
- House Bill 3630 (2023) directed ODOE to create a “one stop shop” for information about energy efficiency incentives and programs
  - Tentatively called the Hub for Information on Incentives Programs in Oregon (HIPO)



# Thank You!

Contact:

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

[www.Oregon.gov/energy](http://www.Oregon.gov/energy)



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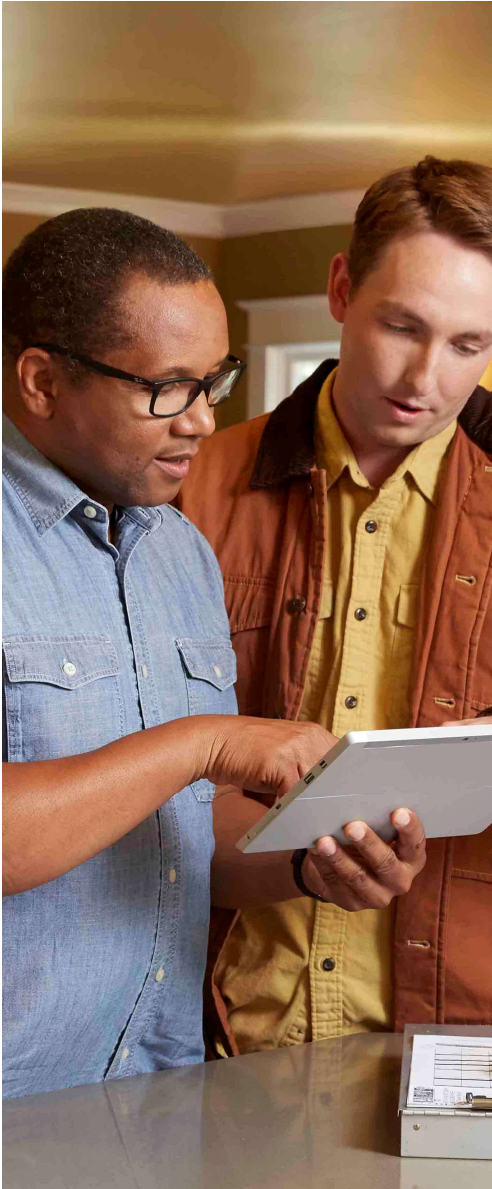


# Preparing For HOMES and HEAR

## What, Why & How

Fall 2024 Trade Ally Forums





## Objectives For Today

- Learn about unique elements of HOMES and HEAR
- Consider
  - **What** each factor is
  - **Why** these requirements are in place
  - **How** to start preparing





## Home Assessments

- **What**
  - A limited home energy inspection identifying opportunities and projected savings/energy cost impact
  - Required for most projects in HEAR and all projects in HOMES
  - Format TBD, it may be Home Energy Score or a similar approach
- **Why?**
  - USDOE requirement
  - Help customers learn about higher impact measures
  - Identify potential cost increases from electrification
- **How To Prepare**
  - Learn about how to get credentialed as a Home Energy Score provider

# Whole Home Program Design

- **What**

- HOMES is a performance-based program providing incentives for reducing overall energy usage by at least 20%
- Whole Home program designs require multiple measures to be installed to access incentives
- Projects in HOMES will be submitted by one trade ally working as a lead contractor for multiple measures

- **Why**

- Written into the Inflation Reduction Act. Advocates suggest this approach encourages deeper retrofits

- **How To Prepare**

- Consider establishing business partnerships that will enable projects with HVAC, insulation and DHW to be submitted under one lead contractor.



# BPI 2400 Compliant Energy Modeling

- **What**

- The HOMES program “% savings” metric is determined by energy modeling software. Energy Modeling can be completed by the installer or a third party
- Data collection and modeling inputs must be compliant with Building Performance Institute (BPI) standards
- USDOE approves specific modeling products – currently SnuggPro and Optimizer are approved software

- **Why**

- Written into IRA as a requirement

- **How To Prepare**

- To be a modeler – explore demos of approved software and learn about BPI credentialing
- To work with modelers – your technical expertise can be a resource to community-based organizations or independent energy modelers





## Combining Energy Trust and HER funding

- **What**

- The combination of funding streams will enable many clients to receive upgrades at little or no cost
- Presently both federal and utility funder incentives are paid after project completion

- **Why**

- Combining funding will help more families benefit from the work we all do!

- **How To Prepare**

- Consider what capacity your business has to carry costs between project start to incentive payment
- Help Energy Trust understand your cashflow needs and the available options

# Serving Low Income Customers

- **What**

- HOMES and HEAR require original income verification, either by demonstrating enrollment in another program or providing proof of income

- **Why**

- Federally required (we cannot use self-attestation)

- **How To Prepare**

- Energy Trust is planning to support customers and to monitor the enrollment platform where customers submit proof-of-income
- When the program launches, relationships with local social service providers may offer opportunities to connect with households who can benefit from HOMES and HEAR



## How To Keep In Touch

- Work with your local Energy Trust contact/field team representative for questions and support
- ODOE administrative lead – Kristina Donnelly  
[HomeEnergyRebates@energy.oregon.gov](mailto:HomeEnergyRebates@energy.oregon.gov)
- Energy Trust – Mark Wyman  
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