



Energy Efficiency Training Grant Program Guidance

**OREGON
DEPARTMENT OF
ENERGY**



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EETIG PROGRAM GUIDANCE

Version	Date	Modification
1	12/2/2024	
2	12/18/2024	Removed "proof of insurance" on page 4 under Application.

Executive Summary

In 2023, the Oregon State Legislature passed HB 3409 to address the effects of greenhouse gas emissions. Sections 1-5 focus on increasing energy efficiency in homes and commercial buildings with the adoption of energy efficient heating and cooling, emphasizing the adoption of heat pump and heat pump water heating technologies.

The House Bill also established the Energy Efficient Technologies Information and Training fund, which will provide \$2 million in grants for training contractors, builders, installers, and other workers in industries related to energy efficiency. These funds will be available to training program providers through a competitive grant process. Qualified applicants will demonstrate the ability to deliver technical and informational education related to techniques and incentives for upgrading and installing energy efficiency appliances. Training with this funding is intended to expand the energy efficiency workforce in Oregon to prepare for installation demand created by existing and future incentives available to homeowners through all state, federal, and local institutions.

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Who We Are

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.

- We listen and aspire to be inclusive and equitable in our work.
- We are ethical and conduct our work with integrity.
- We are accountable and fiscally responsible in our work and the decisions of our agency.
- We are innovative and focus on problem-solving to address the challenges and opportunities in Oregon's energy sector.
- We conduct our agency practices and processes in a transparent and fair way.

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: We research, collect, and analyze data and information to inform state energy planning, regulation, program administration, and policy development.
- A Venue for Problem-Solving Oregon's Energy Challenges: We convene constructive conversations about Oregon's energy challenges and opportunities that consider a diverse range of perspectives, foster collaboration and innovative solutions, and facilitate the sharing of best practices with consumers and stakeholders.
- Energy Education and Technical Assistance: We provide technical assistance, educational resources, and advice to support policy makers, local governments, industry, energy stakeholders, and the general public in solving energy challenges and meeting Oregon's energy, economic, and climate goals.
- Regulation and Oversight: We manage the responsible siting of energy facilities in the state, regulate the transport and disposal of radioactive materials, and represent Oregon's interests at the Hanford Nuclear Site.
- Energy Programs and Activities: We manage and administer statutorily authorized energy programs to save energy, support the state's decarbonization efforts, make communities more resilient, and position Oregon to lead by example.

Purpose

The purpose of this guide is to provide information on the Energy Efficiency Training Grant (EETIG) program. This document is meant to be informative. All requirements of the program are listed in the Funding Opportunity Announcement, ORS 469.760 to 469.772, and OAR 330-290-0000 to 330-290-0110.

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Funding Availability

ODOE will award up to \$2 million in grants to qualifying training providers. ODOE anticipates awarding between \$150,000 to \$400,000 to individual organizations. Awards will be based on the number of qualified applicants and program needs. Successful applicants are not excluded from future awards through additional rounds of funding.

Timeline

EETIG Timeline	
Funding Opportunity Announcement Open	December 2, 2024
Application Deadline	January 17, 2025
Award Notification	February 10, 2025
Program Start Date	Date of Performance Agreement Execution
Grant Period	Program Start – End of Period of Performance (not to exceed 24 months)

Program Options

Funding for the EETIG is available to applicants that can demonstrate a comprehensive plan to address a stated need in the energy efficient equipment installation workforce. Applicants should focus on one of the following program options when developing or expanding programs. Programs may cover more than one option but should identify the primary focus of the program.

HVAC Training

Programs may provide training for HVAC workers. These programs can include training for new and existing workers. When developing the program, applicants should outline how program participants will be connected to jobs, pre-apprenticeships, or apprenticeships. Any certifications that will be available to participants through this program should be listed.

Home Energy Auditor Training

Applicants may choose to provide home energy auditor training. The proposed training should show how auditors will be prepared to provide BPI 2400 level modeling, which will be required for the federal Home Energy Rebates programs (also known as HOMES and HEAR). Any certifications that will be available to participants should be listed.

Contractor Business Development

Programs providing business development for contractors should identify which areas of business development will be included in the training. Programs should list ways contractors will be connected to new workers or apprenticeship programs.

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Home Energy Efficiency Upgrade Training

Programs may provide training to contractors and technicians for home energy efficiency upgrades. These upgrades should focus on providing technical expertise to capture maximum energy efficiency through installations. Programs may focus on workers that provide weatherization, heat pump installation, heat pump water heater installation, electrical panel upgrades, or any other home energy efficiency upgrade. Programs may provide training for new and existing workers.

Statutory Program Requirements

HB 3409 has set specific requirements for programs funded by this grant. How programs will comply with the following requirements should be included in the program description.

Understandable

Training should be developed to provide the greatest opportunity for successful completion. Materials should be easily understandable and technical support should be provided. Applicants should explain how the program will be accessible to a variety of participants.

Variation

Training should include information on existing incentive programs and what the energy efficiency requirements are for each program. Guidance on how homeowners can utilize all available incentives should be provided.

Locally and Culturally Connected

Applicants or partner organizations should be locally and culturally connected. Applicants should state how they or their partners are connected to communities and how this connection will be used to provide training and support to participants.

Definitions

Department means the Oregon Department of Energy.

Director means the director of the Oregon Department of Energy.

Climate and Economic Justice Screening Tool (CEJST) means the screening tool developed by the Council on Environmental Quality as directed by presidential Executive Order (EO) 14008, consisting of an interactive map identifying disadvantaged communities.

Contractor means a person or construction company that provides services related to energy efficiency including roofing, glazing, insulation, HVAC, electrical, and plumbing. This may include direct contractors or subcontractors.

Disadvantaged communities as outlined in presidential EO 14008, signed January 27, 2021, means a census tract identified by the CEJST as being economically disadvantaged and overburdened by pollution and underinvestment in housing, transportation, water and wastewater infrastructure, and health care. A community qualifies as “disadvantaged” if the census tract is above the threshold for one

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or more environmental or climate indicators and the tract is above the threshold for the socioeconomic indicators.

Energy efficient means the method by which less energy is used to produce the same task or result.

Environmental justice communities mean communities meeting the definition of environmental justice communities under Oregon Revised Statutes 2023 Edition, 469A.400(5). The definition includes communities of color, communities experiencing lower incomes, Tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth, and persons with disabilities.

Memorandum of Understanding (MOU) means a formal non-binding agreement between two or more parties that outlines the intentions, roles, and objectives of the partnership.

Application

Applicants must submit a completed application. All fields must be completed. If a field is not applicable to the proposed program, enter "N/A." Program Budget, Work Plan, **Proof of Insurance**, and Memorandum of Understanding (if applicable) must be submitted with the application. Submit the application and all required documentation by email to eetraining@energy.oregon.gov by the submission deadline on the opportunity announcement. Applicants should consider submitting the application early to avoid disqualification for any submission delays.

Work Plan

A program work plan is required. The program work plan should be used to identify timelines and actions for the program. Completing the work plan before the budget document may help inform the budgeting process. A work plan template is available on the [website](#). Note: All the examples provided are intended to give guidance. Actual responses do not need to contain content from the examples and should include greater detail.

Program Goal

Applicants should describe what need the program intends to address. The goal should include how the proposed program will address the need that has been identified and what measures will help ensure that the program is successful in reducing the need or bridging the gap.

Example: A program has had success in one area of the state. There are well established and successful curriculum and services for participants. The program has had a completion rate of 85 percent, and 75 percent of those have been connected to pre-apprenticeship programs after program completion. This program is not available to participants outside of a certain geographic location. Local community organizations have expressed a need for training in additional locations. The proposal is to take existing program materials and make modifications to offerings to address local needs and expand to those geographic areas with expressed interest in trainings.

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Program Overview

The program overview should be used to clearly define what the program will look like. Applicants should provide specific information on how the program will be run and what a participant should expect when participating, including what types of training and the frequency. Identify what the participant will have attained at the end of the training. This could include certifications or job placements.

Example: The proposed program will work with local training facility X to promote additional offerings to existing programs. The participants will participate in a six-week program focused on providing X training in partnership with local contractors. The training will be on-site training at X location. Training will be weekdays from 8 a.m. to 4 p.m. Participants will be offered travel and wage stipends. At the end of the six-week program, participants will earn certificate X and may be given employment offers from participating contractors. Contractors will be given \$X for each participant hired to offset income lost for additional training for the new workers.

Program Objectives

Program objectives that are clear and measurable should be identified. These objectives could include number of participants or certifications earned. Applicants should be specific. Program objectives will be used for program reporting.

Example: 1. The program intends to train X number of new workers and X number of existing workers per training session. 2. The training session will be offered X number of times during the program period of performance, each lasting X. X number of services will be provided or offered. 3. X number of certificates will be earned by participants.

Activities

For each program objective listed, at least one activity that will be completed to achieve the objective should be identified. These activities will be used to determine program progress on reporting documents. A minimum of one activity per budget cycle should be listed.

Example: Marketing will be done at local X to promote free training, done during quarter X, and X number of local membership will enroll in training. Enrollment numbers will indicate successful completion of action.

Program Budget

Applicants should use the Work Plan and Application to determine an appropriate program timeline for the purpose of budgeting. Applicants are required to use the Program Budget Template. The program budget must support the program goals and activities outlined in the Work Plan and Application.

Administrative Costs

Administrative costs are any expenses that are required to support the organization but are not part of the program delivery. These costs are associated with expenses that an organization may incur to run on

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a day-to-day basis or with monitoring and reporting of program activities. Allowable administrative costs are capped at 15 percent of the total budget amount. Budgets with more than 15 percent administrative costs may be considered if Applicants can demonstrate unique program administration requirements where additional funding is necessary to implement a successful program. If additional administrative funding is requested, the “Admin(Optional)” tab on the Budget Template will need to be completed.

Personnel/Fringe

Personnel costs associated with the day-to-day operation of the organization are allowable administrative costs only for the time spent administering the proposed program. Personnel time spent monitoring or reporting on program progress is considered administrative. Only the percent of time spent on the program is considered an allowable administrative expense. If the employee spends a portion of their time on other programs or offerings, the budget should reflect only the percentage of time spent on administering the EETIG program.

Fringe benefits are any other personnel costs associated with the employment of each employee such as health insurance, retirement benefits, life insurance, or other. These are calculated separately from personnel costs. Fringe benefits can either be reported as a cost (base) if the benefits have a set cost, or as a percentage of the position’s salary.

Additional Administrative Costs

Additional administrative costs are expenses that are required for the day-to-day operation of the organization. These expenses could include insurance, electricity, rent, or marketing. If the organization conducts other activities other than the proposed program, only a portion of the operating costs are covered by this grant. The percent attributed to the program should be based on the percentage the program is of the whole offerings of the organization.

Program Costs

Personnel/Fringe

Personnel costs associated with the development of training materials are allowable program costs. Additionally, personnel costs associated with delivery of training are considered program costs. If an employee is involved in both administrative and programmatic activities, only list the percentage of time the employee will be directly implementing the program. Any time associated with administrative duties should be listed in the Administrative Costs section.

Fringe benefits are any other personnel costs associated with the employment of each employee such as health insurance, retirement benefits, life insurance, or other. These are calculated separately from personnel costs. Fringe benefits can either be reported as a cost (base) if the benefits have a set cost, or as a percentage of the position’s salary.

Travel

Travel associated with the delivery of the proposed program should be included in the program travel expenses. Typical travel in this category might include mileage and hotel accommodation at training sites. Only list travel that is necessary for the actual program delivery. Do not include travel to any events that would be considered marketing for the program.

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Other Direct Costs

Other direct costs needed to deliver the program may be listed as category line items. Examples of this could include facility rental, software (other than licenses for participants), and equipment. Applicants must include why each expense is necessary for the delivery of the program in the notes section.

Contractual Costs

Any contracts needed to support the delivery of the program should be itemized. List the name of the subcontractor or consultant and what services will be provided. This could include technical services or translation services. If the contractor is unknown, list the type of services and enter "TBD" in the Name of Contractor column. If applicant is awarded funding, the names of all contractors and consultants must be reported to the Department.

Participant Services

List all services that the program will provide for participants. Include the cost per participant and the expected number of participants to utilize the service. Services could include wage stipends, equipment purchases, software subscriptions, childcare, travel reimbursements, employer incentives, mentorship, career advising, and employability skills training.

Notification

Applicants will be notified when the application has been received. Notifications will be sent out after the application completeness review process. This initial review process will only determine whether the application is complete and progressing to the competitive review process. Passing the completeness review process does not indicate that the application will be successful.

Applications that have been determined to be complete and have moved to the competitive review process will be reviewed by a panel of reviewers that will score applications based on a set rubric. Applicant names will not be part of the review process. All applications will be scored on the content of the application documents and the program proposal.

All Applicants that have been scored during the competitive review will be notified once all applications have been scored. The applicants with the highest scores may be offered a Performance Agreement. Successful applicants will have 30 days to return the signed Performance Agreement.

Budget Alterations

Alterations within Budget Categories

Grantees may alter line items within a budget category, if consistent with the project scope accepted during award negotiations. The total amount of expenditures in the budget category should remain the same as the approved budget. The budget categories are:

- Administrative Costs
- Program Costs
- Contractual Costs
- Participant Services

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- Other Expenses

Other Budget Alterations

Grantees must submit a request for budget changes and receive written approval from the Department for changes that are not within the same budget category.

Receipts for expenditures must be submitted with reporting documentation. Any variation between the receipts and the approved budget must be explained in the reporting documentation.

The Department may request a revised budget or updated expenditure information from the grantee as needed.

Unspent Funds

Any funds from the approved budget that are unspent will be forfeited. Final payments will be made after the Department reviews and approves the program closeout report. Any unspent funds will be retained by the Department. Grantees will be notified of any overpayments that need to be returned.

Payments

The first payment will not be issued until the performance agreement has been fully executed (the applicant and the Department have signed the agreement). Once the performance agreement has been executed, grantees will be given an initial payment that is 25 percent of the total approved grant award. Additional payments will be made on a quarterly basis.

The total approved program period will be split into quarters for payments. Quarterly payments will be calculated based on a percentage of the remaining award amount divided by the remaining program periods. For example, a two-year program would be 8 quarters. Quarterly payments would be the award amount minus the initial 25 percent payment, divided by 7 quarters. Each quarterly payment will be in equal amounts.

The final quarterly payment will be withheld until the program has been completed and all reports and receipts have been received by the Department.

Payments, except for the final quarterly payment, will be made before expenditure reporting. Grantees must report quarterly on expenditures and receipts must be attached to reporting documents.

The Department will be responsible for auditing program progress and budgets. The Department may request additional information from grantees as needed. Any discrepancies in expenditures may be deducted from future payments or the Department may request reimbursement of overpayments.

Modifications to Performance Agreement

If a Grantee wishes to amend the performance agreement, the Grantee must submit written notice to the Department. The modification must be such that the program meets the requirements of the funding opportunity announcement. The Department will determine if the amendment meets all requirements outlined in OAR 330-290-0110.

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Reporting

Grantees are required to collect data and maintain records to provide quarterly reports to the Department. Detailed records and receipts for all expenses will be required for accurate reporting. Reported expenses should correspond to budget expenses and program activities. The Department will provide a template for reporting expenditures.

Additional data such as program participant survey responses and Grantee survey responses may also be required for reporting purposes. The Department will provide guidance on what additional data is expected.

All reported data will be collected and used for reporting on EETIG grant performance and effectiveness. Data may be used by the Department for program auditing purposes. Grantees may be required to provide further information as requested by the Department. If deficiencies are found by the Department in program performance, the Department may issue a deficiency notice as specified in OAR 330-290-0100. Reporting will be required on a quarterly basis with additional reporting due at the one year and program completion dates. Below is a schedule of reporting dates. Please note that the close out date for programs are specified in the Performance Agreement and may differ from the schedule below.

Type of Reporting	Program Quarter	Report Due
Quarterly	Program Start –May 31, 2025	June 30, 2025
Quarterly	June 1, 2025 – August 30, 2025	September 30, 2025
Quarterly	September 1, 2025 – November 30, 2025	December 31, 2025
Quarterly & Annual	December 1, 2025 – February 28, 2026	March 31, 2026
Quarterly	March 1, 2026 – May 31, 2026	June 30, 2026
Quarterly	June 1, 2026 – August 30, 2026	September 30, 2026
Quarterly	September 1, 2026 – November 30, 2026	December 31, 2026
Close Out	Final quarter or December 1, 2026 – February 28, 2027	Reporting date of final quarter or March 31, 2027

Insurance Requirements:

Grantee and any private contractors, subcontractors, or subgrantees must obtain and maintain insurance covering the Department in the types and amounts indicated in the performance agreement.

If the Project includes the construction, remodel, or repair of real property or improvements to real property, Grantee must insure the real property and improvements against liability and risk of direct

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physical loss, damage, or destruction at least to the extent that similar insurance is customarily carried by entities constructing, operating, and maintaining similar property or facilities.

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FOR MORE INFORMATION

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<https://www.oregon.gov/energy/Incentives/Pages/EETIG.aspx>



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