

State Home Oil Weatherization (SHOW)

December 1, 2024



SHOW Program Manual

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Acknowledgements

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Program Summary

Oregon Housing and Community Services (OHCS) administers the State Home Oil Weatherization (SHOW) Program for the State of Oregon. Program funding originates through an annual assessment upon petroleum suppliers conducting distillate fuel oil business in Oregon. The SHOW Program provides cash incentives for energy conservation measures to Oregonians who obtain their primary heating fuel from fuel oil dealers.

This program manual provides the guidelines and specific regulations to administer and implement the SHOW Program. These guidelines apply to the program administrators and applicants of the program.

Authoritative Guidance

Statutory Authority: ORS 456.599

Statutes Implemented: ORS 456.594 to 456.599, 469.421(8)

Oregon Administrative Rules: OAR 813-207-0000 to 813-207-0090

Program Contact

For more information regarding the application process or administration of the SHOW Program, contact:

Mailing: Oregon Housing and Community Services
Attn: SHOW Program Analyst
725 Summer St NE, Suite B, Salem, OR 97301

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Website: www.oregon.gov/ohcs

Program Terminology

The following terminology is used for the SHOW Program:

- ◆ Cash payment: A payment made by OHCS to the dwelling owner or the contractor on behalf of the dwelling owner for energy conservation measures.
- ◆ Contractor: A person that installs or assists a dwelling owner to install energy conservation measures in a dwelling.
- ◆ Distillate fuel oil: A general classification of petroleum products, including diesel fuels and fuel oils, which is used for a variety of purposes, including, but not limited to, diesel engine and motor fuel, space heating, and electric power generation. Common names include, but are not limited to, dyed diesel #1 or #2, off-highway fuel, fuel oil, and heating oil.
- ◆ Dwelling: Real or personal property in Oregon inhabited as the principal residence of a dwelling owner or a tenant. This includes manufactured dwellings, floating homes, and single units in multiple-unit residential housing. This does not include recreational vehicles. For multiple-unit residential housing, all units that share a common space (i.e. kitchen, bathroom) or are not all-inclusive with independent common spaces are to be considered part of a single dwelling.
- ◆ Dwelling owner: The person who has legal title to a dwelling and whose dwelling receives space heating primarily from a fuel oil dealer.
- ◆ Energy conservation items: This includes, but is not limited to, air sealing, weatherstripping, ceiling and wall insulation, crawl space insulation, vapor barrier materials, programmable thermostats, insulation of heating ducts in unheated spaces, and replacement windows.
- ◆ Energy conservation measures (“measures”): This includes the installation of energy conservation items and the energy conservation items installed, where the items are primarily designed to improve the space heating and energy utilization efficiency of a dwelling. This does not include the dwelling owner’s own labor.
- ◆ Fuel oil dealer: A person, association, corporation or other form of organization that supplies fuel oil at retail for the space heating of dwellings. Eligible fuel oil dealers may include those who deliver or provide services into Oregon.
- ◆ Grantee: A non-profit contractor, including those established through government or other public entity service, which maintains a grant agreement with OHCS to be eligible for SHOW Program cash payments in exchange for providing no-cost weatherization services to low-income households occupying eligible dwellings.
- ◆ Gross operating revenue: The gross receipts from sales or service made or provided within Oregon during the regular course of the petroleum supplier’s business, but does not include either revenue derived from interutility sales within Oregon or revenue received from the sale of fuels that are subject to the requirements of Article IX, section 3a, of the Oregon Constitution, or ORS 319.020 or 319.530.
- ◆ Household: Any individual living alone, a family with or without children, or a group of individuals who are living together as one economic unit.
- ◆ Household income: The total annual income of a household before deductions.

- ◆ Low-income: Total annual household income at or below 200% of the Federal Poverty Level, as established and provided annually by the U.S. Department of Energy (USDOE).
- ◆ Petroleum supplier: A petroleum refiner in Oregon or any person engaged in the wholesale distribution of distillate fuel oil in Oregon.
- ◆ Space heating: The heating of living space within a dwelling through methods including, but not limited to, forced air heating and radiant heating.
- ◆ Tenant: A person, including a roomer, entitled under a rental agreement to occupy a dwelling unit to the exclusion of others.
- ◆ Wholesale: The sale to retailers for the purpose of resale.

Program Funding

The Petroleum Supplier Assessment (PSA), as established and described in ORS 456.595 and 469.421(8), is the sole funding source of the SHOW Program. OHCS conducts the PSA based on the state fiscal year, of July 1 through June 30. The statutes dictate specific guidelines through which OHCS must administer the PSA to generate the revenue.

Assessment upon Petroleum Suppliers

OHCS may elect to conduct the PSA each fiscal year based on program financial needs and forecasting. When electing to conduct the PSA, OHCS must assess only those petroleum suppliers who conduct business in Oregon related to the wholesale refinement or distribution of distillate fuel oil. There is no requirement as to the end use or purpose of the distillate fuel oil. However, petroleum suppliers must declare all gross operating revenue, indicating the amount of sales subject to Article IX, section 3a, of the Oregon Constitution, ORS 319.020 and 319.530. The petroleum suppliers must identify and classify their applicable fuel oil sales prior to reporting revenue to OHCS.

To comply with statute regulations for each PSA:

- ◆ OHCS must collect an annual aggregate amount from all petroleum suppliers of no more than \$400,000.
- ◆ OHCS must assess each petroleum supplier no more than 0.375% (0.00375) of the gross operating revenue reported on its submitted statement.
- ◆ OHCS must assess each petroleum supplier an amount proportionate of its own gross operating revenue to the aggregate gross operating revenues reported by all petroleum suppliers assessed.

Schedule of the Assessment

Prior to the beginning of a new fiscal biennium, the Executive Director of OHCS must submit a proposed agency budget to the Oregon Department of Administrative Services for Governor Approval, which outlines the amount of each PSA collection, or lack thereof, during the biennium. During each year of the biennium, OHCS must convene a public meeting to engage SHOW Program stakeholders and other interested parties, whether or not the agency elects to conduct an assessment, to provide a full accounting of the projected funding requirements, revenue collection, and allocation of funding.

If OHCS elects to conduct an assessment and after engaging with stakeholders, OHCS must create and distribute specific documents to conduct the PSA:

- ◆ Gross Operating Revenue Statement (GORS): A form that enables petroleum suppliers to disclose their gross operating revenues of distillate fuel oil, for sales during the previous calendar year (January 1 to December 31), subject to the PSA.
- ◆ Order for payment: An official order with Department of Justice approval that requires the petroleum suppliers to submit payment to OHCS upon their percentage of the assessment.
- ◆ Payment invoice: A billing invoice, coupled with the order for payment, which states the amount of each petroleum supplier's percentage of the assessment and details regarding submission.

While the stakeholder engagement and GORS distribution dates are not explicitly outlined in statute, OHCS has created advised deadlines in order to successfully satisfy the remaining deadlines. With the exception of the stakeholder engagement meeting (which may be held earlier than the timeline), OHCS must conduct the PSA along the following timeline, based on the specific year of a biennium:



To comply with the statute, OHCS must make all efforts possible to involve all petroleum suppliers in the PSA who engage in distillate fuel oil wholesale in Oregon. Therefore, OHCS may conduct surveys and inquiries throughout the year prior to initiating the PSA in order to maintain an accurate and current listing of all suppliers. The SHOW Program stakeholder meeting may also serve as a point of communication to outstanding suppliers. Suggested stakeholders involved with this meeting may include, but are not limited to, petroleum suppliers, fuel oil dealers, and their representative organizations.

Securing Program Grantees

To assist in outreach and providing services to low-income dwelling owners and tenants, OHCS may enter into grant agreements with eligible contractors who provide energy conservation items and measures through no-cost weatherization assistance. Amounts awarded to each grantee may be based on historical use and projected need within the affected service territory.

Eligible Applicants & Dwellings

There are two categories of applicants who are eligible to apply for SHOW Program cash payments. Those categories include:

- ◆ **Dwelling owners**: Persons who have legal title to a dwelling and are acting on behalf of themselves or their tenants..
- ◆ **Contractors**: Persons or entities, acting on behalf of dwelling owners or their tenants, who provide weatherization services on eligible dwellings. Contractors may be for-profit, non-profit, or grantees.

Eligible applicants must satisfy ALL of the following requirements:

- ◆ The eligible dwelling must be considered the primary residence of either the dwelling owners or their tenants at the time of application.
 - Allowable dwellings may include detached homes, attached homes or apartments, manufactured dwellings, and floating homes.
 - Recreational vehicles are not eligible.

- ◆ The eligible dwelling must be heated primarily from a fuel obtained from a fuel oil dealer at the time of application as well as once all eligible measures have been completed.
 - All primary heating fuels retailed by eligible fuel oil dealers ARE considered eligible.
 - Primary heating fuels not retailed by eligible fuel oil dealers ARE NOT considered eligible (i.e. natural gas, electricity, propane supplied by propane-only dealers).
- ◆ The dwellings owners or their contractors must complete eligible energy conservation measures (as indicated in *Eligible Energy Conservation Measures*) upon the eligible dwelling.
- ◆ **For-profit contractors only:** The amount of the SHOW Program cash payment must be passed forward as a discount to the dwelling owner at the time of payment for the contracted work. If this is not passed forward, the dwelling owner will be considered the applicant for the cash payment.
- ◆ **Contractors only:** Contractors must confirm that the dwelling owners or their tenants use the dwelling as their primary residence and that primary space heating fuel is obtained from an eligible fuel oil dealer both at the time of application and once all eligible measures have been completed.

Application Procedure

The SHOW Program Cash Payment Application will be available from OHCS on its website. Applicants may also request applications in-person and through mail, electronic mail, or fax. Once complete and determined eligible, applications submitted to OHCS will be considered for SHOW Program cash payments.

Application Submission and Waiting List

Applicants must submit a SHOW Program Cash Payment Application to OHCS, completed to the fullest extent possible, via mail, electronic mail, fax, or in-person delivery. OHCS will date-stamp the applications on receipt prior to distribution to the Program Analyst. The Program Analyst will review applications by order of the receipt date-stamp and will request additional documentation from applicants as needed. All applicants will be informed with a decision regarding their applications by mail. SHOW Program cash payments, if awarded, will be issued by OHCS in the form of checks.

SHOW Program funding will determine the availability of cash payments. The SHOW Program funding year operates from July 1st through June 30th. OHCS will announce any reductions of funding or inability to award cash payments on its website. In the case of depleted funding, any applications received by OHCS during this time will be placed on a

waiting list and prioritized based on the receipt date-stamp. Once funding becomes available, those applications on the waiting list will be served first, in date-stamp order, and then continue to applications as they are received by OHCS.

Complete Application Summary

To be considered a complete application, an application must have the following components and documentation:

- ◆ SHOW Program Cash Payment Application
 - The document will be available on OHCS's website and, at request, by OHCS.
 - All sections of the application must be completed to the fullest extent possible.
 - Incomplete applications will be delayed in processing to await receipt of additional documentation upon request by the Program Analyst.
- ◆ Proof of purchase or delivery of primary heating fuels from a fuel oil dealer
 - Documentation may include, but is not limited to, delivery tags with dealer name and delivery address, billing invoice, or historical account detail printout from dealer.
 - Fuel oil dealers must retail, at a minimum, such fuels labeled as dyed diesel, diesel #1 or #2, or heating oil. If the dealer is considered eligible, other fuels may include, but are not limited to, kerosene, propane, or wood.
- ◆ Receipts or itemized billing statements of all eligible measure costs
 - Receipts must detail how the measures meet eligibility (as indicated in *Eligible Energy Conservation Measures*), including the item installed, the cost of the individual measure, and the value of energy savings (if applicable).
 - For dwelling owners as the applicant, receipts of all eligible energy conservation measures completed must be marked paid in full on or before the date of the application.
 - For contractors as the applicant, invoices for all eligible energy conservation measures must be completed on or before the date of the application.
- ◆ Household income documentation (optional for Tier 1 cash payments)
 - For dwelling owners or their tenants, documentation of income for the household occupying the eligible dwelling to verify proof of low-income status.
 - For contractors, verification of income for the household occupying the eligible dwelling to verify proof of low-income status.
 - The applicant and occupying household may coordinate to submit income documentation separate from the application, directly to the SHOW Program Analyst.

Cash Payment Tiers and Maximums

There are two tiers of cash payments available to eligible applicants of the SHOW Program. Eligibility for Tier 1 cash payments is determined by the total household income of the dwelling occupants (i.e. dwelling owner or tenant) at time of application in addition to eligible measures completed. Eligibility for Tier 2 cash payments is determined solely on eligible measures completed.

Applications will be reviewed based on date-stamp submission rather than tier qualification. However, the Executive Director of OHCS may designate a percentage of program funds specifically for the purposes of awarding cash payments to Tier 1 cash payment applicants.

Tier 1 Cash Payments

Eligible applicants may qualify for cash payments of Tier 1 based on eligible measures completed at the time of application and after verification of low-income status for the household occupying the eligible dwelling. Income guidelines for eligibility are updated on an annual basis by USDOE and are available on the OHCS website. Cumulative measure costs have the following established maximums per measure category:

- ◆ Up to \$5,700 for eligible heating system measures.
- ◆ A cumulative total up to \$17,600 for eligible insulation measures completed per dwelling envelope region, which include:
 - Up to \$5,900 for ceiling/attic region,
 - Up to \$6,500 for wall region, and
 - Up to \$5,200 for floor/subfloor region
- ◆ Up to \$5,900 for eligible window and door measures.
- ◆ Up to \$500 for air infiltration measures.
- ◆ Up to \$1,000 for occupant health and safety and building code requirements.

Tier 2 Cash Payments

Eligible applicants may qualify for cash payments of Tier 2 based on eligible measures completed at the time of application. Cumulative measure costs have the following established maximums per measure category:

- ◆ Up to \$3,800 for eligible heating system measures.
- ◆ A cumulative total up to \$6,600 for eligible insulation measures completed per dwelling envelope region, which include:
 - Up to \$3,000 for ceiling/attic region,
 - Up to \$1,800 for wall region, and

- Up to \$1,800 for floor/subfloor region
- ◆ Up to \$3,000 for eligible windows and doors measures.
- ◆ Up to \$500 for air infiltration, and
- ◆ Up to \$1000 for occupant health and safety building code requirements.

Lifetime Maximum Payments

Total cash payments over the lifetime of the SHOW Program for all measure categories awarded to a single dwelling may not exceed \$30,700, which is the maximum cumulative total of Tier 1 cash payments. No unique measure may be claimed more than once on any SHOW Program Cash Payment Application over the lifetime of the SHOW Program. The aggregate total of awarded cash payments is based on the dwelling rather than the applicant. Dwellings with previously awarded SHOW Program cash payments may still be eligible for the difference between the previous award and the maximums indicated above. The Program Analyst can determine remaining SHOW Program cash payment incentives.

Eligible Energy Conservation Measures

There are five categories of eligible energy conservation measures for SHOW Program cash payments, of which are indicated below. Minimum specifications are identified below, unless local building code or other applicable specifications apply (i.e., contractor-required specifications).

Heating System Measures

These measures relate to the systems and equipment used in the production of heat for the dwelling. The goal of these measures is to promote more efficient and less costly heating of the dwelling. The following measures and respective requirements apply to heating system measures in relation to eligibility for SHOW Program cash payments:

- ◆ Installation of new heating equipment that operates with heating fuel obtained from fuel oil dealers and is more efficient than and replaces existing units, including, but not limited to, furnaces, stoves, and boilers.
- ◆ Replacement of heating equipment components, including, but not limited to, burners, electrical controls, and combustion chambers.
- ◆ Installation, replacement, or repair of heating equipment or its components—attached or otherwise—that enables its safe and efficient operation, including, but not limited to, repair of fuel lines and tanks and annual maintenance.
- ◆ Insulation, sealing, repair, or replacement of ductwork.
- ◆ Installation of programmable thermostats.

Insulation Measures

These measures relate to the insulation added in the three dwelling envelope regions (ceilings or attics, subfloors, and walls). The goal of these measures is to promote better heat retention. The following measures and respective requirements apply to insulation in dwelling envelope regions in relation to eligibility for SHOW Program cash payments:

- ◆ Insulation of ceiling and attic regions; this must be to a minimum of R-38 or that fills the cavity.
- ◆ Insulation of subfloor regions; this must be to a minimum of R-25 or that fills the cavity.
- ◆ Insulation of exterior or knee wall regions; in exterior walls, this must be to a minimum of R-13 or that fills the cavity; in knee walls, this must be to a minimum of R-21 or that fills the cavity.

Window and Door Measures

These measures include the replacement and weatherization of external windows and doors. The goal of these measures is to promote better heat retention. The following measures and respective requirements apply to window and door measures in relation to eligibility for SHOW Program cash payments:

- ◆ Replacement of windows and storm windows.
 - Each window must meet a minimum value rating of U-0.30.
 - In the case where window replacement is not possible, pre-assembled glass or solid acrylic storm windows may be installed. Installation of plastic window weatherizing kits are not eligible measures.
- ◆ Replacement of exterior doors.
 - Exterior doors must either be solid core or be insulated.
 - Exterior sliding glass doors or patio doors must meet a minimum value rating of U-0.30.
 - Exterior doors are those in which separate unheated spaces (including garages and basements) from heated, living spaces.

Air Sealing Measures

The goal of these measures is to promote less conditioned air loss, reduce moisture intrusion, and support the other measures applied to the pressure boundary. These measures include, but are not limited to, the application of caulking, installation of weatherstripping and conducting pressure testing.

Occupant Health and Safety Measures and Building Code Requirements

The goal of these measures is to address hazards to occupant health and safety that were present prior to or were caused by the work completed. These measures include, but are

not limited to, performance of combustion appliance safety testing, repair of electrical components or physical hazards, assessment of fire hazards, addressing moisture intrusion issues, addressing indoor air quality issues, and addressing shared vent or flue issues.

Measure Specifications

Applicants must submit SHOW Program Cash Payment Applications no more than one year from the date of the installation of eligible measures. Exceptions may be provided by OHCS on a case-by-case basis.

The following specifications apply to multiple-unit residential housing in relation to completed measures:

- ◆ Measures are not required to be uniform across all individual dwellings in a multiple-unit residential housing building.
- ◆ Applications shall only include those measures and dwellings for which measures were applied.
- ◆ For common or shared measures (i.e. heating systems, insulated dwelling envelope regions, etc.), measure costs shall be prorated by the square footage of each unit affected to the total square footage served by the measures.
- ◆ For dwellings housed among commercial space, the same specifications apply as indicated above in regards to the specifically residential square footage.

In relation to the proration of measure cost in common or shared situations, the following example applies for guidance purposes:

The applicant installs insulation in the entire subfloor region of a duplex. Submitting two applications (one for each unit of the duplex), the applicant will take the total measure cost for the insulation and divide it by two. This will be the measure cost per application for subfloor insulation.

Measures that shift or switch primary heating fuel from that obtained from a fuel oil dealer to another source, such as electricity or natural gas, are not eligible for the SHOW Program.

Household Income Verification

Documents used for the purposes of household income verification are only required for applicants of Tier 1 cash payments. Contractors who screen income verification as part of an entry or intake process may provide OHCS with summary documentation rather than originals. All complete applications and supporting documentation for applicants of both Tier 1 and Tier 2 cash payments will remain confidential with OHCS throughout the duration of file retention until securely shredded.

The following guidelines are to be considered related to declaring household income:

- ◆ Household income includes all sources of income, before any deductions, of all household members occupying the dwelling at the time of application.
- ◆ Earned income (i.e. wages from employment) by household members ages 17 and younger or age 18 and enrolled in high school *is not counted* as household income.
- ◆ Benefit income (i.e. social security or child support) received by or on behalf of household members ages 17 and younger or age 18 and enrolled in high school *is counted* as household income.
- ◆ Household income must be declared consistently by the entire household for either:
 - The *full calendar month prior* to the date of the application; or
 - The *last 30 days prior* to the date of the application.

Types of Income

The following types of income must be declared if received by any member of the household as household income, using copies of the listed documents for income verification:

| Type of Income | Required Documentation |
|-----------------------------------|---|
| Child support or alimony | - Court order - Written statement from person paying |
| Dividends, interest, or annuities | - Letter, check stub or statement from corporation/bank - Bank statement (if gross amount is deposited) |
| Earned income or wages | - Pay stubs (not the check) from each payday during the declared period - Written statement from employer indicating gross wages |

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| Foster care support or adoption assistance | - Official state or court documents |
| Military pay | - Leave and earnings statement |
| Real property income | - Receipt of payment from tenant for all rental due dates during the declared period |
| Regular cash gifts | - Written statement from person providing support - Bank statement or other proof of payments |
| Retirement or pensions | - Letter, check stub or statement from corporation/employer - 1099 tax statement; Bank statement (if gross amount is deposited) |
| Self-employment income | - Completed Statement of Self-Employment Income with all supporting documentation |
| Social security, supplemental, and disability income | - Letter (mail or online printout), check stub or statement from the Social Security Administration - SSA 1099 tax statement with current year's increase notification statement - Department of Human Services (DHS) benefits and income printout - Bank statement (if gross amount is deposited) |
| Temporary Assistance for Needy Families (TANF) | - DHS benefits and income printout - Online statement of card deposits |
| Tribal assistance | - Per capita letter, statement or check stub - Bank statement (if gross amount is deposited) |
| Unemployment | - Letter or statement from employment office - Online printout of unemployment payments for each week of the declared period |
| Veterans' benefits | - Letter, check stub or statement from the Department of Veterans' Affairs - Bank statement (if gross amount is deposited) |

| | |
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| Workers' compensation | <ul style="list-style-type: none"> - Current benefit award letter or check stub - Letter or written statement from corporation/provider - Bank statement |
|-----------------------|---|

When considering household income, the following examples apply for guidance purposes:

The applicant applies for a Tier 1 cash payment on July 15th. The household members are two siblings, who both need to declare their income. The older sibling is retired and receives social security retirement benefits every month on the 5th. The younger sibling is employed full-time and receives wages every other Friday.

For the previous full calendar month (June 1st-June 30th): Documentation copies will include the social security award letter for benefits received on June 5th and paystubs for checks received on June 1st, 15th, and 29th.

For the previous 30 days (June 15th-July 14th): Documentation copies will include the social security award letter for benefits received on July 5th and paystubs for checks received on June 15th and 29th and July 13th.

The applicant receives social security benefits on behalf of a child in the household (age 3) who is disabled. The applicant must claim the benefits as household income.

Documentation copies include the social security award letter for benefits.

The applicant receives retirement benefits on behalf of a deceased spouse. The applicant must claim the benefits as household income.

Documentation copies include the letter for benefits.

Income Guidelines

To qualify for Tier 1 cash payments, applicants' household income must be at or below 200% Federal Poverty Level, as established by the USDOE. The income guidelines are available from the USDOE's website.

Installation Warranty Requirements

Any contractor or Grantee who completes eligible energy conservation measures, either as the applicant or on behalf of the dwelling owners and tenants, must provide warranty of installation. The following requirements must be met in relation to the installation:

- ◆ The installing contractor must comply with all applicable federal, state, and local laws and regulations when completing eligible measures.
- ◆ The installing contractor must provide warranties on labor and installation of energy conservation measures for up to one year after the installation date. The installing contractor must pass on any warranties on materials, manufacturing process, and design to the dwelling owner.

Remedies and Repayment of Falsified Applications

Applicants who knowingly make false statements or misrepresentations of any factor with respect to eligibility or who falsify application materials must repay all SHOW Program cash payments paid to them under the false information. The remedies provided for in this rule are in addition to any civil or criminal fines or penalties applicable under law, including any applicable provisions of federal, state, or local law. Failure to follow these rules will make the applicants ineligible for future eligibility under the SHOW Program.