



Home Energy Rebates Retail Implementation Pre-Launch Timeline and Milestones

Below are key steps for State Energy Offices to consider when implementing retail rebate programs.

1. Legal Agreement [6-8 weeks before launch]

A legal agreement between the State Energy Office or implementor and the retailer is typically required for a retail program to proceed. The contract would define the terms of reimbursement to retailers for rebate amounts, addressing confidentiality, indemnity, insurance, submission processes, and verification, among other needs as defined by the program and the retailer. This is the opportunity to establish redemption and reporting requirements, invoicing processes, and marketing responsibilities. Implementors and retailers have similar agreements already in place for existing rebate programs across the country. State Energy Offices can explore utilizing an agreement already in place if one exists with the relevant parties.

2. Rebate Eligibility Determinations [4 weeks before launch]

State Energy Offices will need to provide the number of anticipated rebates, whether to allow online purchases, start/end dates, rebate dollar amounts, qualifying product lists, and qualifying store lists.

3. Marketing and Communications [2-3 weeks before launch]

Depending on the agreement with the retailers, in-store signage and employee education are opportunities to promote the rebate programs. Program design will need to be finalized in time for retail employees to train on the programs. State-designed materials may need to be reviewed and approved by the retail partner before they are shared via employee or customer channels.

4. Product Eligibility Changes [Ongoing]

Product availability may change as new products become available or if others are not restocked. The State Energy Office should review the eligible product list 3-4 times per year for the lifetime of the program for accuracy.

NASEO can facilitate introductions between State Energy Offices and retailers for detailed discussions on program design and implementation. If your State Energy Office is willing to share examples of contract agreements, marketing and communication signage and plans, or other program materials with other states, please contact abell@naseo.org.