



NORA STATE ASSOCIATION REBATES TERMS & CONDITIONS

NORA funds shall not be used to influence legislation, elections, including all lobbying activities.

State Reporting

States receiving NORA rebates shall provide a detailed report to NORA, on an annual basis, which shall be submitted by the last day of January of the following year. The report shall contain project summaries, final costs, and the rebate category to which the rebate was applied (Consumer Education & Training, Research Development & Demonstration or Energy Efficiency) for the reported year.

NORA provides rebates to Authorized State Associations in three categories.

A. Consumer Education & Training (CE&T)

B. Research, Development & Demonstration (RD&D) including consumer equipment rebates

C. Energy Efficiency (EE) including consumer equipment & tank rebates

In providing these grants, NORA requires the State Associations to adhere to the following policy:

A. Consumer Education & Training

Activities in this area must be directed towards educating consumers about Oilheat and/or Bioheat® fuel.

Consumer Education

- Each State shall provide the NORA President a copy of the proposed CE program plan and activities for review and approval prior to initiating a contract with a marketing agency or vendor. This practice will help to limit any discrepancies in the NORA statute and provide clarity for accounting and audit processes.
- NORA's President and/or NORA's legal counsel shall review and approve all consumer education materials prior to being made public.
- The state association should obtain the copyright to all consumer education materials and are encouraged to share those materials with other State Association within the NORA Alliance.

Prohibited:

- Describing the attributes of competing products such as natural gas, propane, or electricity. Comparative terms including, but not limited to, "better" or "best" should not be used unless they are referring only to Oilheat and/or Bioheat®.
- There shall be no discrimination when using NORA rebates in consumer education. For example, do not refer customers to a website or other reference of only State Association members—all companies must be included when directing the public to retail heating fuel providers.

Training:

- Training in this area should be used to improve liquid fuel heating for consumers including, improving service, reliability, efficiency, carb on home safety and reducing consumer costs. Funding for employee training may include service technicians, customer service representatives and drivers. Additionally, others who interact with liquid fuel consumers may also receive training.

Prohibited:

- There shall be no discrimination when using NORA rebates in training. Training must be available to all in a non-discriminatory fashion regardless of the company's membership status in the State Association..
- These funds may not be used for training regarding business management topics including, how to improve margins, acquisition strategies, etc.
- Funds cannot be used to advertise or conduct consumer surveys related to a promotion that is focused exclusively on consumer and employee safety and training.

B. Research Development & Demonstration

This category is primarily controlled directly by NORA with most research conducted at its Liquid Heating Fuels Laboratory in Plainview, NY. However, a State Association may receive rebates for supplemental research that advances the industry. In those cases, NORA's President and laboratory management shall be consulted regarding the nature and scope of the research to determine its value to the entire industry.

The NORA statute allows funds to be used to transition customers to higher efficiency equipment. RD&D funds may be used to advise customers on the advantages of higher efficiency equipment and the benefits of upgrading their heating system. Funds cannot be used to advertise or conduct consumer surveys related to a promotion that is focused specifically on research, development, and demonstration activities.

C. Energy Efficiency

This category is designed to improve the efficiency and safety of consumers' heating equipment. Funds can be used for monetary rebates to consumers as incentive to upgrade their heating to newer, more efficient models. In addition, they can be used to upgrade fuel storage tanks and other equipment in the home that will improve safety, including fire alarms, carbon monoxide detectors, etc.

According to the NORA statute: "The Alliance shall, to the maximum extent practicable, coordinate, develop, and implement the programs and activities of the Alliance in conjunction with existing State energy efficiency program administrators.

NORA requires State Associations to contact the appropriate agency in their state to request guidance.

Reimbursement of Expenses

Pursuant to the statute, NORA depends on the State Associations to implement programs and understands that these activities may require staff time and appropriate reimbursement for those costs. Total reimbursement for these expenses should be attributed to the appropriate program or activity of the employee. Expense reimbursement shall be limited to no more than 4% of the total cost of the activity. NORA may, upon request of the state association and after consultation with the Executive Committee, authorize a higher reimbursement rate.

To receive reimbursement for activities carried out by a state association, the request shall conform to the following:

- All invoices should clearly indicate the time and hours of each employee utilized on an approved NORA project. These should indicate the date and nature of the activity, the number of hours, the rate of pay and the work performed. The rate of pay should be annual salary, plus taxes paid and cost of benefits divided by the number of hours worked in a year.
- These requests should be submitted at least quarterly, or more frequently, to ensure that spending is carefully tracked.
- If funds are being designated for a NORA board member, State Association board members, staff member, relative or similar the transaction must be reviewed by the NORA Executive Committee and must be in compliance with NORA's Conflict of Interest policy.