



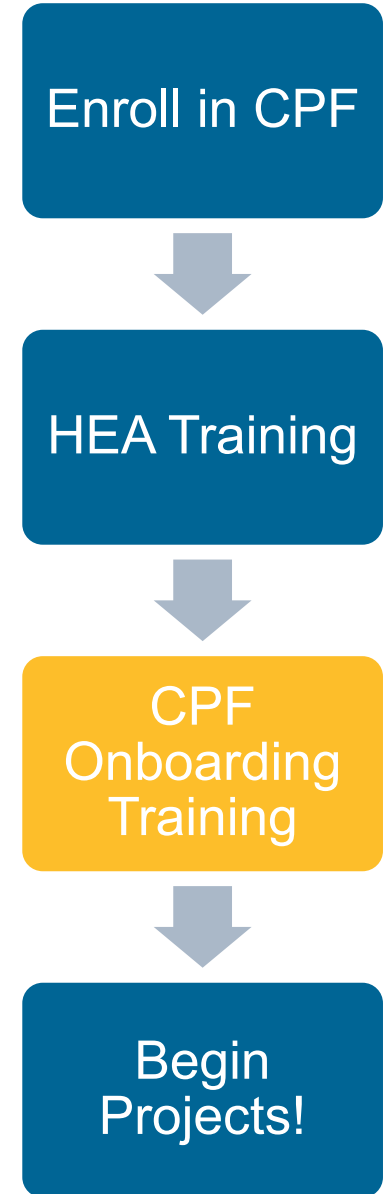
# Community Partner Funding (CPF)

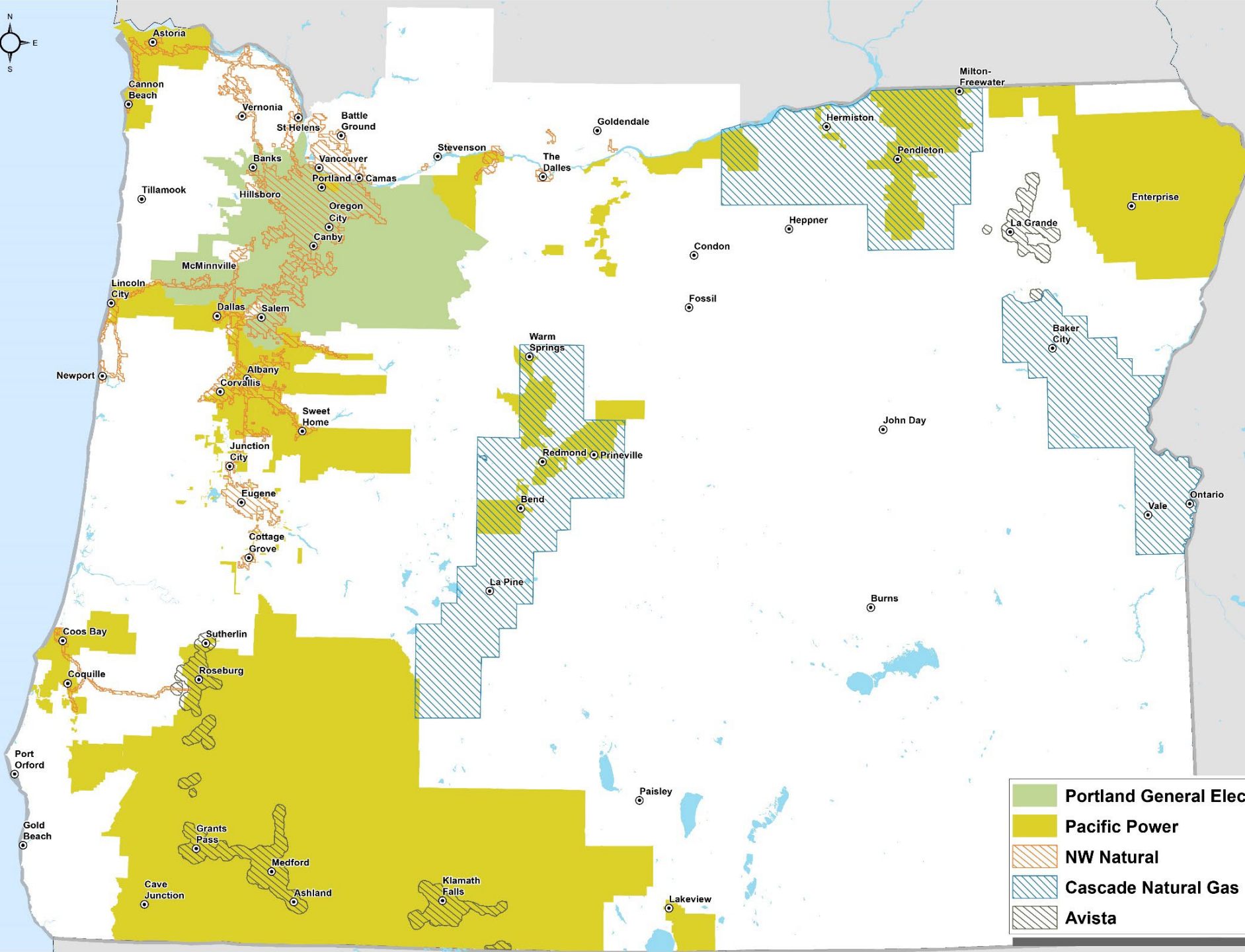
2023 Onboarding



# Agenda

- Review CPF Eligibility Requirements
- Home Energy Assessments
  - 300 CPF: Customer Authorization Form and Home Energy Assessment Data
- Installed Energy Upgrades
  - 320 CPF: CPF Project Details Form
  - Contractor Invoices
- Next Steps









# CPF Project Eligibility in Oregon

**Must be a single-family detached home, manufactured home, or small multifamily unit.**  
Small multifamily includes duplexes, triplexes, fourplexes and side-by-side units, with no residences above or below, such as a townhome

## Homes Heated by Wood, Oil or Propane

Incentives are generally only available for homes heated by electricity or gas.

Let's discuss further if you have customers' homes heated by these alternate fuel sources.

**Homes must be serviced by:  
Pacific Power, PGE, Cascade  
Natural Gas, NW Natural,  
and/or Avista**



# CPF for Multifamily Properties

CPF incentives may differ for multifamily properties (5+ units)

Working with a multifamily renter? Contact our Multifamily Energy Advisor  
**Fredy Salazar,**  
[fsalazar@trccompanies.com](mailto:fsalazar@trccompanies.com)

Reach out to learn how to support renters in your CPF program:  
[multifamily@energytrust.org](mailto:multifamily@energytrust.org)







ENERGY TRUST OF OREGON  
RESIDENTIAL – EXISTING SINGLE-FAMILY  
AND MULTIFAMILY

# 2022 SPECIFICATIONS MANUAL

[energytrust.org](https://energytrust.org)

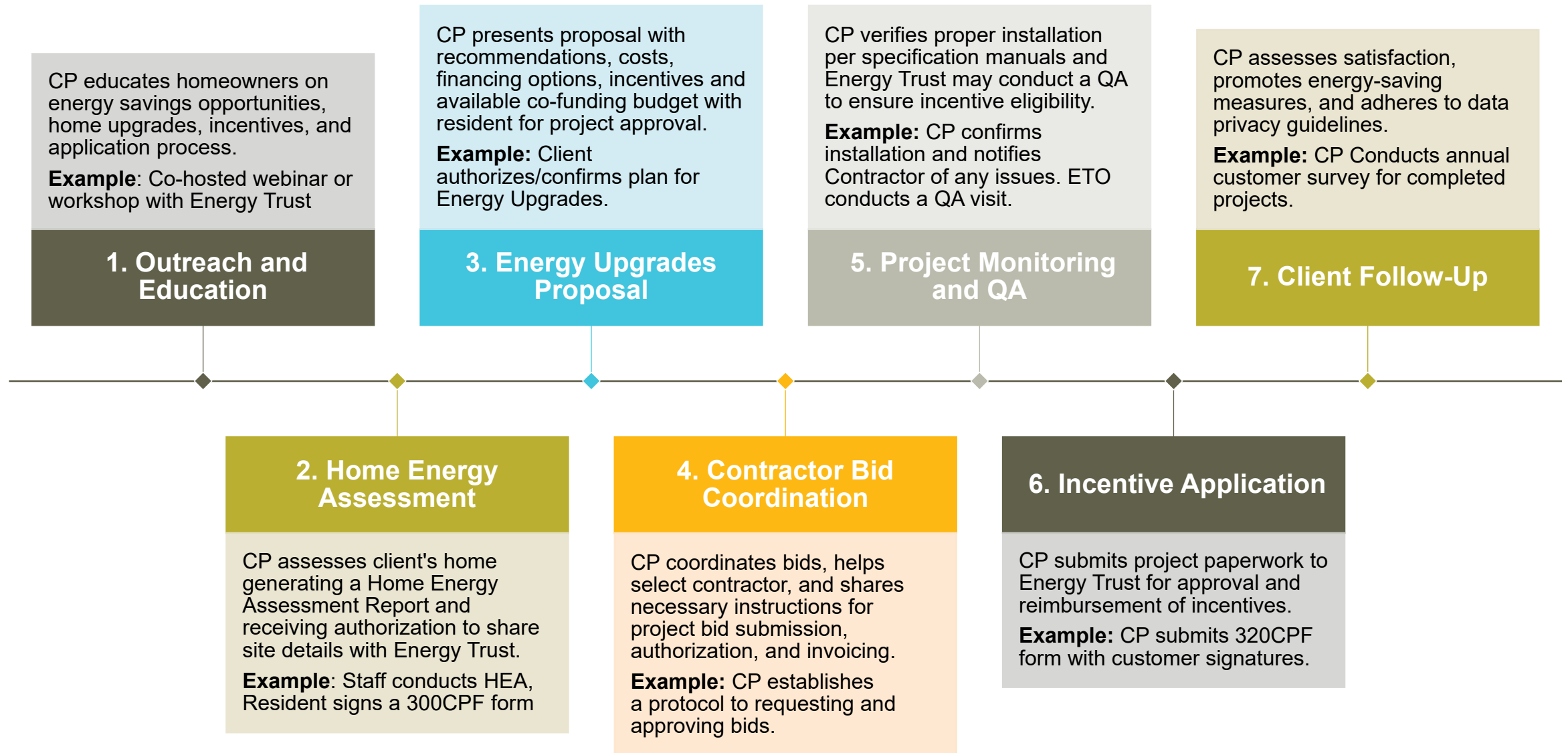
Updated April 2022

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## Specifications Manual

- Energy Trust can connect you to a network of enrolled [‘Trade Ally’ contractors](#)
- To ensure quality work, trade allies adhere to the [Energy Trust Specifications Manual](#)
  - Includes best practice checklists for installs
  - Available online in [English](#) and [Spanish](#)
- Non-Trade Ally contractors must connect with Energy Trust to review this manual together.

# Quick Review: Typical CPF Project



# **Educating Community Members**



# Customer Education Resources

HEA Flyer &  
CPF Incentive Grid

Low/No-Cost  
Home Energy  
Improvements  
Flyer

Water Heating,  
Weatherization,  
and Space Heating  
Brochures

Ductless Heat  
Pump Best  
Practices Guide

Co-Host a  
Webinar,  
Workshop, or  
Focus Group

We have Spanish-  
language  
marketing  
materials too!



# **Home Energy Assessments**

Required Paperwork



**300 CPF**  
Customer Authorization  
& Home Energy Assessment Form

# 300 CPF: Page 1 Instructions

Identify the client's residence type:

- Some CPF incentives differ depending on residence type
- Different Energy Trust staff will support your small multifamily projects

Funding Agency Job ID<sup>\*\*</sup>:

*<sup>\*\*</sup> To be completed by utility rate payer funded organizations only. This may be the Oregon Housing and Community Services (OHCS) Job ID. Leave blank if organization does not report project information to OHCS.*

| Residence Type (Please select the residence type)     |  |
|---|--|
| <input type="checkbox"/> Detached, Single-Family Home | <input type="checkbox"/> Manufactured Home   |
| <input type="checkbox"/> Duplex, Triplex, or Fourplex | <input type="checkbox"/> Side-by-side unit with no residences above or below, such as a townhome |

- Note: The ‘Funding Agency Job ID’ only needs to be completed by Community Action Agencies who leverage ratepayer funding.



# 300 CPF: Page 1 Instructions

Check boxes for what measures were completed

- If you are submitting just the HEA initially, only check the HEA box.
- If other measures were completed, check them off

Note who is requesting funding or may request funding **for which measures:** between the CP or contractor:

- This determines who will receive the Energy Trust funding for any completed or prospective measures.

| Home Energy Upgrade(s)   |   |   |
|--|---|---|
| <i>Participating organization(s) will indicate the scope of work agreed upon with the customer in this section. The customer signature on this form will apply to all upgrades in this section. If subsequent work does not fall into one of the checked categories, a second work authorization form will be required with the customer and Participating Organization/contractor signature</i> |   |   |
| <b>1. Is the Participating Organization requesting funding for any home energy upgrades?</b>   |   |   |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No  |   |   |
| <b>1a. If Yes, please select which upgrades:</b>   |   |   |
| <input type="checkbox"/> Home Energy Assessment<br><input type="checkbox"/> Duct Sealing/Repair  | <input type="checkbox"/> HVAC<br><input type="checkbox"/> Water Heating | <input type="checkbox"/> Insulation/Windows |
| <b>2. Will a Contractor be requesting funding for any home energy upgrades?</b>  |   |   |
| <input type="checkbox"/> Yes, <b>Contractor to complete Signature Section B upon completion of upgrade(s)</b><br><input type="checkbox"/> No, <b>Contractor signature is not needed</b>  |   |   |
| <b>2a. If Yes, please select which upgrades:</b>   |   |   |
| <input type="checkbox"/> Home Energy Assessment<br><input type="checkbox"/> Duct Sealing/Repair  | <input type="checkbox"/> HVAC<br><input type="checkbox"/> Water Heating | <input type="checkbox"/> Insulation/Windows |

# 300 CPF: Page 2 Instructions

## Signatures

- Customer and CP signatures are required for the initial home energy assessment.
- A contractor only needs to sign if they are receiving Energy Trust incentives directly.

### Customer Name and Signature

By signing below, Customer agrees to all of the terms and conditions on this form. Customer authorizes Participating Organization/Contractor to submit this authorization and all required invoices or measure documentation to Energy Trust on Customer's behalf for all Energy Trust funding that is available for the energy-saving measures indicated in the Home Energy Upgrade section (Pg.1) that the Participating Organization/Contractor has or will complete.



|                        |  |           |
|------------------------|--|-----------|
| Customer signature     | Full name (please print and use same name as on invoice) | Date      |
| Site Address           | City   | State Zip |
| Customer email address | Customer phone   |           |

### Participating Organization Name and Signature

By signing below, Participating Organization certifies that this authorization, accompanying invoice(s) and measure documentation are complete and accurate, and that all improvements associated with this funding request were completed as of the signature date below. To receive funding, all work must comply with the [Residential Specifications Manual](#) and meet requirements as laid out in the [program incentive guides](#) found on Energy Trust's website.

\*By signing below, Participating Organization acknowledges that subsequent Form 300CPF submissions may be submitted by Contractor without first obtaining the signature of Participating Organization as described on page 1 of this form.



|                                      |                             |      |
|--------------------------------------|-----------------------------|------|
| Participating Organization signature | Full name (please print)    | Date |
| Participating Organization company   | Home Energy Assessment Date |      |

### Signature Section B: If a Contractor is requesting funding for a home energy upgrade, please sign below:

#### Contractor Name and Signature

By signing below, Contractor certifies that this authorization, accompanying invoice(s) and measure documentation are complete and accurate, and that any improvements that the Contractor requests funding for were completed as of the signature date below. Contractors must attend the Energy Trust Home Specifications Manual Training. To receive funding, all work must comply with the [Residential Specifications Manual](#) and meet requirements as laid out in the [program incentive guides](#) found on Energy Trust's website.



|                      |                          |      |
|----------------------|--------------------------|------|
| Contractor signature | Full name (please print) | Date |
|----------------------|--------------------------|------|



# 300 CPF: Page 3 Instructions

- Complete based on the Home Energy Assessment visit

|  |   |
|--|---|
| <b>Community Partner Name</b>  |   |
| <b>Home Energy Advisor Name</b>  | <b>Date</b>   |
| <b>Participant Information</b>   |   |
| Participant Name: _____  |   |
| Participant Type: <input type="checkbox"/> Homeowner <input type="checkbox"/> Renter <input type="checkbox"/> Rental Property Owner/Manager  |   |
| <b>Site Information</b>  |   |
| Electric Provider: <input type="checkbox"/> Pacific Power <input type="checkbox"/> PGE <input type="checkbox"/> Other _____  |   |
| Gas Provider: <input type="checkbox"/> NW Natural <input type="checkbox"/> Avista <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Other _____  |   |
| Year Built _____   | Sq. Ft. _____ # Stories _____   |
| Foundation/Basement: <input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Crawlspace <input type="checkbox"/> Crawlspace w/ vapor barrier<br><input type="checkbox"/> Half basement <input type="checkbox"/> Full basement <input type="checkbox"/> Slab on grade |   |
| <b>Home Energy Systems Information</b>   |   |
| <b>1. Heating Systems (please check off all heating systems in the home)</b>   |   |
| <input type="checkbox"/> Electric Heat: <input type="checkbox"/> Elec Resistance Forced Air (Furnace) <input type="checkbox"/> Elec Resistance Zonal (Baseboard, Cadet, etc) <input type="checkbox"/> Heat Pump  |   |
| <input type="checkbox"/> Natural Gas Heat: <input type="checkbox"/> Forced Air (Furnace) <input type="checkbox"/> Boiler <input type="checkbox"/> Other _____  |   |
| <input type="checkbox"/> Other Heat (propane, oil, wood, etc): _____   |   |
| <b>Primary:</b> Which heating system heats the primary living space (e.g. living room, great room, etc.):  |   |
| If 'Other' Primary Heat, is a replacement recommended? <input type="checkbox"/> Replace with Electric <input type="checkbox"/> Replace with Natural Gas  |   |
| Is the primary heating system functioning? <input type="checkbox"/> Yes <input type="checkbox"/> No If a heat pump, is the heat pump technology working? <input type="checkbox"/> Yes <input type="checkbox"/> No  |   |
| Primary Heating System Thermostat Type: <input type="checkbox"/> Non-programmable <input type="checkbox"/> Programmable <input type="checkbox"/> Smart Thermostat (Nest or Eco-bee)  |   |
| Does the home have Wi-Fi? <input type="checkbox"/> Yes <input type="checkbox"/> No   |   |
| Is there secondary non-electric heating? (Wood stove, Propane, etc) <input type="checkbox"/> Yes (please describe): _____  |   |
| <b>2. Water Heating</b>  |   |
| Fuel Type: <input type="checkbox"/> Electric <input type="checkbox"/> Gas  | Location of water heater (garage, utility room, basement, etc): _____ |

# 300 CPF: Page 4 Instructions

- ‘Energy Upgrade Considerations’
  - Energy upgrade eligibility
  - Client interest in moving forward
- ‘Additional Notes’:
  - Opportunity to describe proposed upgrade plans in more details
  - Describe customer barriers
  - Add extra notes about heating situation, health and safety concerns, etc.

| Energy Upgrade Considerations:  | Is the home eligible?<br>(Yes/No)                                  | Is the resident interested?<br>(Yes/No/Unknown) |
|---|--|---|
| 1. <b>Ductless Heat Pump:</b> Suggest if the home has electric resistance zonal heat like baseboard or wall cadet heaters that serve the primary living space | Yes  | Yes   |
| 2. <b>Ducted Heat Pump:</b> Suggest if the home has an electric resistance forced air furnace   | No <input type="button" value="v"/>                                | No <input type="button" value="v"/>             |
| 3. <b>90+% AFUE Gas Furnace:</b> Suggest if the home has an existing, older gas furnace, especially if it is inefficient                                      | No <input type="button" value="v"/>                                | No <input type="button" value="v"/>             |
| 4. <b>Smart Thermostat:</b> Suggest if the home has Wi-Fi, a forced air furnace (gas or electric resistance), and a non-programmable thermostat               | No <input type="button" value="v"/>                                | No <input type="button" value="v"/>             |
| 5. <b>Heat Pump Water Heater:</b> Suggest if the home has an older water heater, especially if located in unconditioned space like a garage                   | Yes  | Yes <input type="button" value="v"/>            |
| 6. <b>Attic Insulation:</b> Suggest if the home has less than R-18 (typically 6 inches of insulation or less)   | Yes  | Yes   |
| 7. <b>Floor Insulation:</b> Suggest if the home has less than 3-4 inches of floor insulation (R-11 or less)   | Yes  | Yes   |
| 8. <b>Windows:</b> Suggest any broken/non-functioning single-pane windows to be replaced with double-pane or greater  | Yes <input type="button" value="v"/>                               | Unknown <input type="button" value="v"/>        |
| 9. <b>Referral to Community Action Agency (CAA):</b> Income-qualified residents may be eligible for free HVAC/weatherization services through their local CAA | Referred? <input type="checkbox"/> Yes <input type="checkbox"/> No |   |

| Additional Notes   |
|--|
| 1. Are there any energy upgrades you will assist the resident to pursue? Which ones?<br>DHP bid scheduled for 3/15, interested in self-install insulation. Electrical panel upgrade may be needed.         |
| 2. If the resident was eligible for any measures, but not interested, please describe why:<br>Windows could be replaced, but not the priority  |
| 3. Other Notes (ex. expand on health and safety concerns, further describe secondary heating sources, etc):<br>The home has a wood fireplace for aesthetics, primarily uses the electric baseboard heaters |



# 300 CPF: Page 5 & 6 Instructions

## Page 5: Terms and Conditions

## Page 6: Optional Demographic Survey

- Customer should review the terms and conditions of the CPF program
- Demographic survey responses are optional, but encouraged as they inform who CPF is reaching, which can help maintain and grow funding for this program

### Optional Customer Demographic Information (If completed, choose all that apply)

#### Why is Energy Trust asking for this information?

Energy Trust is asking customers to submit demographic information because it is our responsibility to ensure that all customers can directly benefit from our services. We believe demographic data collection is a simple yet powerful tool for pursuing equity and inclusion in our work and programs. Receiving the information below about our customers will give us a clearer picture of program participation rates within our Residential Programs. We will use that information to assess our offers and identify barriers to participation, enabling us to develop and improve offers to reduce or eliminate those barriers. Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives.

Providing this information is optional, does not impact your participation in the program, and will be held confidential by Energy Trust.

#### Do you (or someone in your household) rent or own your home?

- ☐ Own
- ☐ Rent
- ☐ Live there but don't pay rent
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

#### Which of the following racial and ethnic backgrounds best describe you? (choose all that apply)

- ☐ Asian or Asian American
- ☐ Black or African American
- ☐ Hispanic or Latino/a/x
- ☐ Middle Eastern or North African
- ☐ Native American or Alaskan Indian
- ☐ Native Hawaiian or other Pacific Islander
- ☐ White
- ☐ Some other race: \_\_\_\_\_
- ☐ Prefer not to answer

#### What best describes your gender?

- ☐ Female
- ☐ Male
- ☐ Non-binary/third gender
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

#### Which of the following ranges describes your total household income before taxes?\*

- ☐ Less than \$25,000
- ☐ \$25,000 - \$34,999
- ☐ \$35,000 - \$49,999
- ☐ \$50,000 - \$74,999
- ☐ \$75,000 - \$99,999
- ☐ \$100,000 - \$149,999
- ☐ \$150,000 - \$199,999
- ☐ \$200,000 or more
- ☐ Don't know
- ☐ Prefer not to answer

#### What is the primary language(s) used in your household? (select all that apply)

- ☐ Chinese
- ☐ English
- ☐ French
- ☐ German
- ☐ Hindi
- ☐ Japanese
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Vietnamese
- ☐ Another language: \_\_\_\_\_
- ☐ Prefer not to answer

#### How long have you lived in your current home?

- ☐ Less than a year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ More than 10 years
- ☐ Don't know
- ☐ Prefer not to answer

#### How many full-time residents live in your home?\*

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 8+

# HEAs: Required Paperwork Overview

- One required document

300 CPF:  
Customer  
Authorization  
Form

*Optional: DHP  
Questionnaire*

**Tip:** Use the Adobe  
'Fill & Sign App'



- Email document(s) to [communitypartners@energytrust.org](mailto:communitypartners@energytrust.org)
  - Please CC your Energy Trust Account Manager
- **Email Subject Line:** Include CP name and site address
  - "CPF Project: 'Participating Organization Name': 100 SW Main St."

# Optional: DHP Questionnaire



# DHP Questionnaire No-Cost DHP Opportunity

- *Does the home have electric baseboard or cadet wall heaters in the main living area?*
  - **Ductless heat pump!**
- During the HEA, complete DHP Questionnaire
  - Household income
  - Energy bill payment experience
  - Thermal comfort experience at home
- If Client's household income < 60% State Median Income
  - They may qualify for a '**No-Cost Ductless Heat Pump**'

## Income Guidelines for Oregon (Program Year 2023)

60% of State Median Income by Household Size  
for use in Federal Fiscal Year 2023

Estimated State Median by Household Size - Source HHS

| Household Unit Size    | Annual Gross Income* | Monthly Gross Income* |
|------------------------|----------------------|-----------------------|
| 1                      | \$31,266             | \$2,605.60            |
| 2                      | \$40,886             | \$3,407.17            |
| 3                      | \$50,506             | \$4,208.83            |
| 4                      | \$60,126             | \$5,010.50            |
| 5                      | \$69,747             | \$5,812.25            |
| 6                      | \$79,367             | \$6,613.92            |
| 7                      | \$81,171             | \$6,764.25            |
| 8                      | \$82,974             | \$6,914.50            |
| 9                      | \$84,778             | \$7,064.83            |
| 10                     | \$86,582             | \$7,215.17            |
| 11                     | \$88,386             | \$7,365.50            |
| 12                     | \$90,189             | \$7,515.75            |
| Each Additional Member | \$1,803              | \$150.25              |

\* Gross Income means all household income before any deductions

# **Energy Upgrade Installs**

Required Paperwork

**320 CPF**  
CPF Project Details Form




# 320 CPF: Page 1 Instructions


- Basic customer and site information
- Please check the box for the Energy Trust **incentive recipient**
  - Participating 'Community Partner' Organization or the 'Contractor'


| Energy Trust Incentive Recipient   |  |
|--|--|
| Who is requesting Energy Trust incentives for home energy upgrades detailed in this form?  |  |
| <input type="checkbox"/> Participating Organization <input type="checkbox"/> Contractor (instant incentive amount listed on invoice) |  |
| Instructions for Signatures  |  |
| Customer   | The Customer is required to sign this form.  |
| Participating Organization   | Has a Home Energy Assessment already been submitted to Energy Trust for this site? <input type="checkbox"/> Yes* <input type="checkbox"/> No<br>*If Participating Organization has completed and successfully submitted a Home Energy Assessment and 300CPF for this site to Energy Trust, the Participating Organization's signature may be omitted on this form. Contractor must write Participating Organization's name in the box marked 'Participating Organization Company'. |
| Contractor   | If the Participating Organization has signed this form, Contractor signatures are only required if Contractor is requesting the Energy Trust incentive.  |

# 320 CPF: Page 2 Instructions

- The Customer must sign the 320 CPF
- The Participating Organization OR the Contractor must also sign
  - If a Contractor is completing this form, the Participation Organization signature **may be omitted** if a Home Energy Assessment was completed.
  - *Contractor should still write in the 'Participating Organization Company' name*

| Customer Name and Signature   |  |      |
|---|--|------|
| <small>By signing below, Customer agrees to the terms and conditions in this application. Customer authorizes Participating Organization/Contractor to submit this application and all required invoices or measure documentation to Energy Trust on Customer's behalf for all Energy Trust funding that is available for the energy-saving measures indicated on this application.</small> |  |      |
|    |  |      |
| Customer signature  | Full name (please print and use same name as on invoice) | Date |

| Participating Organization Name and Signature   |                          |              |
|---|--------------------------|--------------|
| <small>By signing below, Participating Organization certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. To receive incentives, all work must comply with the <a href="#">Residential Specifications Manual</a> and all other Energy Trust program requirements.</small> |                          |              |
|    |                          |              |
| Participating Organization signature  | Full name (please print) | Date         |
| Participating Organization company  |                          | Install date |

| Contractor Name and Signature   |                          |      |
|---|--------------------------|------|
| <small>By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. To receive incentives, all work must comply with the <a href="#">Residential Specifications Manual</a> and all other Energy Trust program requirements.</small> |                          |      |
|    |                          |      |
| Contractor signature  | Full name (please print) | Date |

## 320 CPF: Page 3-7 Instructions

- The remaining pages detail incentive amounts and ask for technical information about the energy upgrade installed
  - Insulation R-values, HVAC model numbers, Water Heater serial numbers, etc.
  - *Relevant Pages: If you only installed windows, for example, only submit page 5 to Energy Trust (in addition to page 1&2)*

| <b>Windows</b> Windows must be installed in a heated area of the home and replace single or double paned windows. Properties in Oregon must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Properties in Washington must be primarily heated by NW Natural. |                |  |  |                              |   |
|--|----------------|--|--|------------------------------|---|
| Window type  | Installed cost | U-Value  | Total area installed   | Total # of windows installed | CPF Incentive (per sq. ft)<br>Electric or Gas |
| <input type="checkbox"/> U-Value < 0.22  | \$             | U-   | sq. ft.  |                              | <input type="checkbox"/> \$1.50               |
| <input type="checkbox"/> U-Value 0.23 – 0.27   | \$             | U-   | sq. ft.  |                              | <input type="checkbox"/> \$1.00               |
| <b>Supporting documentation must be attached to all window applications:</b> <ul style="list-style-type: none"><li>• Proof of U-Value for each window</li><li>• Proof of size for each window</li><li>• Paid in full purchase and install invoicing</li></ul>                                      |                | <input type="checkbox"/> <b>Accepted proof of U-Value:</b> | Attach copies of the NFRC stickers for all windows installed <b>OR</b> the window manufacturer's packing slip with U-Values listed for all windows installed.  |                              |   |
|  |                | <input type="checkbox"/> <b>Accepted proof of size:</b>    | Attach an itemized invoice showing window dimensions and U-Value from manufacturer, distributor, retailer or contractor for all windows installed <b>OR</b> a completed <a href="#">Windows Addendum</a> form. |                              |   |



Contractor Invoice(s)

# Contractor Invoice Preparation: Scenario 1

- For incentives paid to Contractors:
  - 'Energy Trust Incentive' line-item required
- (If applicable) also include a line-item for any additional funding from the Participating Organization

## *Sample Invoice*

### *Contractor:*

Oregon Heating & Cooling

### *Bill To:*

Customer

|                            |          |
|----------------------------|----------|
| Heat Pump                  | \$7,000  |
| Energy Trust CPF Incentive | -\$4,000 |
| Extra Federal Funding      | -\$1,000 |

---

|                         |                |
|-------------------------|----------------|
| <b>Customer Balance</b> | <b>\$2,000</b> |
|-------------------------|----------------|



# Contractor Invoice Preparation: Scenario 2

- When **Participating Organizations** manage the project costs AND receive the Energy Trust incentive:

## 1. \$0 Customer Cost

- **No Energy Trust line-items needed!**

OR

## 2. Remaining Customer Cost

- If the customer still pays a portion:
- line-items are needed to show the Energy Trust incentive AND any additional funding from Participating Organization (if applicable)



### Sample Invoice

*Contractor:*

Oregon Heating & Cooling

*Bill To:*

Participating Organization

|                        |          |
|------------------------|----------|
| Heat Pump              | \$7,000  |
| Energy Trust Incentive | -\$4,000 |
| Extra Federal Funding  | -\$1,000 |

---

|                         |                |
|-------------------------|----------------|
| <b>Customer Balance</b> | <b>\$2,000</b> |
|-------------------------|----------------|



# Energy Upgrade Installs: Required Paperwork

- Two required documents

320 CPF:  
Project  
Details Form

Contractor  
Invoice(s)

- Email Completed Documents to [communitypartners@energytrust.org](mailto:communitypartners@energytrust.org)
  - Please CC your Energy Trust Account Manager
- **Email Subject Line:** Include CP name, contractor name and customer site address
  - Ex. “CPF Project: ‘Participating Organization Name’ / ‘Contractor Name’: 100 SW Main St.”

# No-Cost DHP

- **After the Home Energy Assessment**
  - 300 CPF
  - DHP Questionnaire
  - Contractor Bid (if exceeding max costs)
- **After DHP install**
  - 320 CPF
  - Contractor Invoice
  - Photo of the installed indoor unit

*Reminder: Project costs cannot exceed the following maximums, unless covered by the Participating Organization.*

| Number of Indoor DHP Heads | Maximum Cost |
|----------------------------|--------------|
| One                        | \$4,800      |
| Two                        | \$7,200      |



# Optional Project Resources



# 2023 Insulation Incentive Calculator

- Now **optional**, no pre-approval needed
- Calculates expected incentives for all types of insulation
- Three tabs:
  - Approved Additional Costs
  - Single Family or Small MF
  - Manufactured Homes
- *To receive over \$3.00 sq/ft for attic insulation, please note the additional costs*

Energy Trust CPF Insulation Incentive Calculator - *Single Family or Small Multifamily*

Directions: Please type or select drop-downs for the beige-colored cells for any/all areas that were insulated (attic, floor, wall, kneewall, or rim joist)

|  |                             |  |                                     |
|--|-----------------------------|--|-------------------------------------|
| <b>Customer Eligibility:</b>   |                             | <b>Final Incentive Summary</b>                 |                                     |
| Customer Name:   | Sample Customer             | Total Energy Trust Incentive                   | \$6,750.00                          |
| Customer Address:  | 123 Elm Street              | Who should receive the Energy Trust Incentive? | Participating Organization          |
| Housing Type:  | Detached Single-Family Home |  |                                     |
| Electric Utility*  | PGE                         |  |                                     |
| <small>*Please select 'Other/None' if electric service is not PGE or PAC</small> |                             |  |                                     |
| Gas Utility  | NWN                         |  |                                     |
| Heating System   | Forced Air Furnace          |  |                                     |
| Primary Heating Fuel   | Electric                    |  |                                     |
|  |                             | 1. Eligible?                                   | <input checked="" type="checkbox"/> |
| <b>Attic Insulation</b>  |                             | <b>Attic Insulation Costs:</b>                 |                                     |
| Sq. Ft. of Insulation:   | 1,000                       | Total Installation Cost                        | \$3,500.00 \$3.50 (per sq ft)       |
| Beginning R Value  | 6                           | *Max Energy Trust Incentive                    | \$3,500.00                          |
| Final R Value*   | 49                          |  |                                     |
| Filled cavity?   |                             |  |                                     |
|  |                             | 2. Eligible?                                   | <input checked="" type="checkbox"/> |
|  |                             | 3. Eligible?                                   | <input checked="" type="checkbox"/> |
| <b>Floor Insulation</b>  |                             | <b>Floor Insulation Costs:</b>                 |                                     |
| Sq. Ft. of Insulation:   | 1,000                       | Total Installation Cost                        | \$1,500.00 \$1.50 (per sq ft)       |
| Beginning R Value  | 10                          | *Max Energy Trust Incentive                    | \$1,090.00                          |
| Final R Value*   | 30                          |  |                                     |
| Filled cavity?   |                             |  |                                     |
|  |                             | 2. Eligible?                                   | <input checked="" type="checkbox"/> |
|  |                             | 3. Eligible?                                   | <input checked="" type="checkbox"/> |

To receive more than \$3.00/sq ft, check all additional costs below that occurred at this site

|   |   |  |  |
|---|---|--|--|
| <input type="checkbox"/> Insulation Removal       | <input type="checkbox"/> Drill/Fill Floorboards               | <input type="checkbox"/> Ducting Work                      | <input type="checkbox"/> Knob and Tube Remediation |
| <input checked="" type="checkbox"/> Attic Venting | <input checked="" type="checkbox"/> Access / Pull-Down Stairs | <input checked="" type="checkbox"/> Mechanical Ventilation | <input type="checkbox"/> Asbestos Remediation      |

Please reference the 'Approved Additional Costs' Tab to ensure you include all relevant costs.

Approved Additional Costs | **Single Family or Small MF** | Manufactured Homes

ust Oregon

# Incentive Request Spreadsheet

## When to use:

- For complex projects with multiple energy upgrades
- Helps calculate total expected incentive

| Energy Improvement                | Primary Heating Fuel | Requirements   | 2023 Incentive                     | \$\$\$  | Quantity | Incentive total per measure | approved by ETO |
|-----------------------------------|----------------------|--|------------------------------------|---------|----------|-----------------------------|-----------------|
| Ductless Heat Pump                | Electricity          | Must have an HSPF2 of 8.55 or greater. Incentive only available for homes <b>replacing electric zonal heat</b> as primary heat source of home. Compressor must be inverter-driven. Only one indoor head allowed and must be in primary living area and does not include bedrooms or bathrooms.   | 2,900 per residential structure.   | 2900.00 |          | 0.00                        |                 |
|                                   | Electricity          | Must have an HSPF2 of 8.55 or greater. Incentive only available for homes <b>replacing an electric forced air furnace</b> as primary heat source of home. Compressor must be inverter-driven. Only one indoor head allowed and must be in primary living area and does not include bedrooms or bathrooms.  | \$3,500 per residential structure. | 3500.00 |          | 0.00                        |                 |
| No-Cost Ductless Heat Pump        | Electricity          | Must have an HSPF2 of 8.55 or greater. Allows for up to two indoor heads. Incentive only available for homes <b>replacing electric zonal heat or electric forced air furnace</b> as primary heat source of home. Compressor must be inverter-driven. At least one Indoor head must be in primary living area.<br><i>Type in pre-approved incentive amount into column G to incorporate incentive into total project incentive.</i>     | N/A                                | N/A     |          |                             |                 |
| Ducted Heat Pump                  | Electricity          | HSPF2 of 7.50 or greater. <b>Cannot be combined with heat pump controls or smart thermostat incentives.</b> Must replace electric forced air furnace as primary heat source.   | \$4,000                            | 4000.00 |          | 0.00                        |                 |
| New & Existing Heat Pump Controls | Electricity          | <b>Cannot be combined with ducted heat pump incentive.</b> Must be added to a new or existing heat pump with electric furnace auxiliary heat. Heat pump must be primary heat source. Visit <a href="http://www.energytrust.org/heatpumpcontrols">http://www.energytrust.org/heatpumpcontrols</a> for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. <i>(Include work order)</i> | \$250                              | 250.00  |          | 0.00                        |                 |
| High Efficiency Gas Furnace       | Gas                  | 90 percent annual fuel utilization efficiency (AFUE) or greater. Gas furnaces used as backup for high-efficiency heat pumps, also known as hybrid systems, are not eligible. <b>Customer must meet Savings Within Reach income qualifications.</b>   | \$1,400                            | 1400.00 |          | 0.00                        |                 |

Available on the CPF Insider Page

# Program Cost Assistance Fund



# Program Cost Assistance Fund

- Reimbursements for costs related to Community Partner Funding:
  - Program needs
  - Training
  - Certifications
  - Equipment
  - Consulting services
  - Marketing investments
- Eligible: HEA equipment, such as tablets/laptops, ladders, flashlights, tape measurers, basic hand tools, etc.

COMMUNITY PARTNER

PROGRAM COST ASSISTANCE FUND

PRE-APPROVAL APPLICATION

Energy Trust of Oregon's Program Cost Assistance Fund reimburses enrolled Community Partners for costs related to Community Partner Funding program needs, training, certifications, equipment, consulting services and marketing investments **up to \$1,000 per calendar year**. For additional information, please review the Community Partner Program Cost Assistance Fund guidelines found at [www.energytrust.org/community-partner-funding](http://www.energytrust.org/community-partner-funding).

Program Cost Assistance Funds are available on a first-come, first-served basis. **Pre-approval is required for all reimbursements, except for Personal Protective Equipment (PPE)**. Pre-approval qualifies costs for reimbursement but does not reserve funds. Funds will not be distributed until final invoices for qualified, pre-approved costs are submitted.

FORM SUBMISSION

Please send this application for pre-approval and any other required documents to [homesfund@energytrust.org](mailto:homesfund@energytrust.org). Reach out to your regional Account Manager with any questions.

APPLICATION

Please complete the following information and any relevant sub-sections below:

Community Partner name: \_\_\_\_\_ Date: \_\_\_\_\_

Contact name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Personal Protective Equipment (PPE)

Wearable PPE:

☐ Disposable gloves

☐ Disposable masks

☐ Disposable booties

☐ Disposable coveralls

☐ Safety glasses

☐ Respirator and filters

☐ Work gloves

☐ Kneepads

☐ Tyvek suits

☐ Work boots

Sanitizing and prevention:

☐ Hand sanitizer

☐ Disinfecting wipes

☐ Hand wash station

☐ Thermometer

Social distancing equipment:

☐ Social distance signage

☐ Social distance marking tape

Energy Trust will reimburse qualified PPE purchased from January 1, 2023 to December 31, 2023. Please include an itemized copy of your invoice that lists the items purchased along with the cost. **Qualified PPE purchases do not require pre-approval but please include this application with your invoice for processing.**

Equipment, Products & Services

Select equipment, product(s) and/or service(s) below and provide a detailed description of the program or organizational need for requested products or services. Please allow a minimum of two weeks for the product and services to be reviewed. **Pre-approval is required for reimbursement. For products or services not listed below please submit pre-approval application for consideration.**

Home Energy Assessment equipment (select all that apply):

☐ Tablets/laptops

☐ Ladders

☐ Flashlights

☐ Tape measures/rulers

☐ Basic hand tools (screwdrivers, etc.)

☐ Personal carbon monoxide monitor

☐ Voltage testers

☐ Tarps (floor coverage when opening attic hatches)

## Re-cap and Next Steps



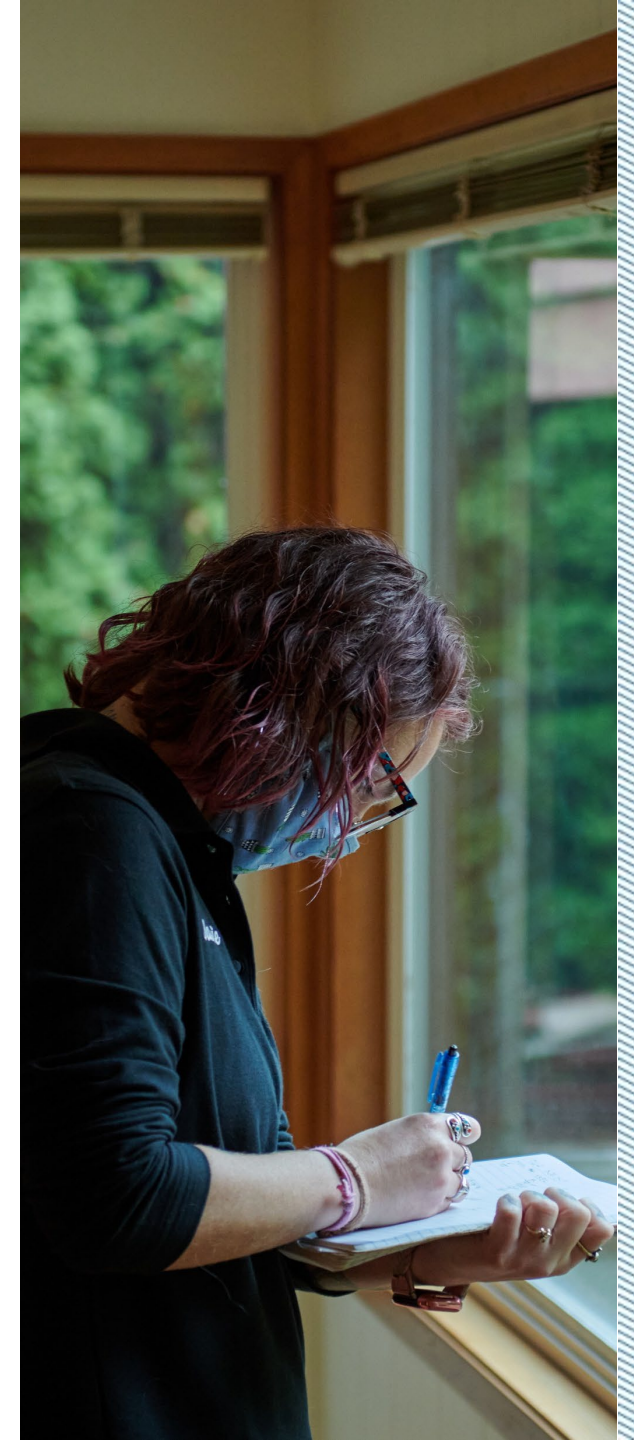
# Onboarding Training Recap

- Eligible Project Sites for Enhanced Incentives
- Trade Ally Network and Project Specifications
- Project Management Process
- Educating the Community
- Project Paperwork for Home Energy Assessments
- Project Paperwork for Installed Energy Upgrades
- Program Cost Assistance Fund



## CPF Resources (linked)

- [CPF Insider Page](#) (hosts all CPF resources)
- [CPF Program Incentive Guide](#)
- [300 CPF](#)
- [DHP Questionnaire](#)
- [320 CPF: Project Details Form](#)
- [Insulation Calculator](#)
- [Incentive Request Spreadsheet](#)
- [List of Educational Collateral](#)
- [Program Cost Assistance Fund](#) (fund to reimburse program costs)



# Next Steps

- Energy Trust to send:
  - 300CPF: Customer Authorization & Home Energy Assessment Form
  - 320CPF: CPF Project Details Form
  - Energy Trust Specifications Manual
- Energy Trust Trade Ally referral meetings (as needed)
- Connect about initial projects
  - Confirm eligibility and incentive levels







Thank you!

**Single-Family Residential Program:**  
[communitypartners@energytrust.org](mailto:communitypartners@energytrust.org)

**Multifamily Residential Program:**  
[multifamily@energytrust.org](mailto:multifamily@energytrust.org)