

# Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320CPF



To be completed by Customer and Participating Organization or Contractor

<b>Steps to completion:</b> <b>1 Participating Organization or Contractor makes</b> an energy-saving upgrade in a qualifying residence. <b>2 Complete</b> application information, including: <ul style="list-style-type: none"><li>Customer signature</li><li>Participating Organization or Contractor signatures</li><li>Invoices billing the customer for purchase and installation marked "Paid in full"</li><li>If this is an instant incentive project:<ul style="list-style-type: none"><li>Invoice must show incentive deductions</li></ul></li></ul> <b>3 Submit</b> documentation via email to <a href="mailto:communitypartners@energytrust.org">communitypartners@energytrust.org</a> . <b>4 Participating Organization or Contractor receives</b> check. Please allow four to six weeks for incentive processing after completed application and supporting documentation are received.  <b>Need-to-know information:</b> <ul style="list-style-type: none"><li>This form should be completed by the Customer and Participating Organization or Contractor.</li><li>Energy Trust must receive applications within 60 days from the date of installation.</li><li>All information must be completed for</li></ul>	<b>Customer Information</b>  This home is <input type="checkbox"/> Owner occupied <input type="checkbox"/> A rental property I own* <i>*If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit <a href="http://www.energytrust.org/w9">www.energytrust.org/w9</a>.</i>  Site address _____ City _____ State _____ Zip _____  Primary phone <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell _____ Other Phone _____ <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell _____  <b>Utility Information</b>  Electric utility: <input type="checkbox"/> PGE <input type="checkbox"/> Pacific Power <input type="checkbox"/> Other _____ Gas utility: <input type="checkbox"/> NW Natural <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Avista <input type="checkbox"/> Other _____  <b>Site Information</b> <table border="1"><tr><td>Year built</td><td>Square feet</td><td>Number of levels</td></tr><tr><td>Primary heating system (<i>check one</i>)</td><td><input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump</td><td><input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other _____</td></tr><tr><td>Water heating fuel</td><td><input type="checkbox"/> Electricity</td><td><input type="checkbox"/> Natural gas <input type="checkbox"/> Propane</td></tr><tr><td>Foundation/ basement</td><td><input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement</td><td><input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab on grade</td></tr><tr><td>Home type</td><td colspan="2"><input type="checkbox"/> Single-family <input type="checkbox"/> Manufactured <input type="checkbox"/> Rowhouse <input type="checkbox"/> Townhouse <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex</td></tr></table>	Year built	Square feet	Number of levels	Primary heating system ( <i>check one</i> )	<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other _____	Water heating fuel	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas <input type="checkbox"/> Propane	Foundation/ basement	<input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement	<input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab on grade	Home type	<input type="checkbox"/> Single-family <input type="checkbox"/> Manufactured <input type="checkbox"/> Rowhouse <input type="checkbox"/> Townhouse <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex	
	Year built	Square feet	Number of levels													
	Primary heating system ( <i>check one</i> )	<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other _____													
	Water heating fuel	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas <input type="checkbox"/> Propane													
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Home type	<input type="checkbox"/> Single-family <input type="checkbox"/> Manufactured <input type="checkbox"/> Rowhouse <input type="checkbox"/> Townhouse <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex															

<b>Energy Trust Incentive Recipient and Additional Funding Sources</b>
<b>Who is requesting Energy Trust incentives for home energy upgrades detailed in this form?</b> <input type="checkbox"/> Participating Organization <input type="checkbox"/> Contractor (instant incentive amount listed on invoice)
<b>Was there an additional funding source applied to this project?</b> <input type="checkbox"/> PCEF: _____ <input type="checkbox"/> ODOE: _____ <input type="checkbox"/> OHCS: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> No additional funding

<b>Instructions for Signatures</b>	
<b>Customer</b>	Customer is required to sign this form.
<b>Participating Organization</b>	Participating Organization is required to sign this form.
<b>Contractor</b>	Contractor's signature is required if Contractor performed the energy upgrades and is requesting the Energy Trust incentive under this agreement.

This **Form 320CPF** is used for completed home upgrades under Energy Trust's Community Partner Funding program. By signing below, Customer, Participating Organization and/or Contractor have agreed that Energy Trust will issue the funding check for energy

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upgrades that meet Energy Trust requirements to the Participating Organization or Contractor named below. Energy Trust may deny funding for any energy upgrades that do not meet Energy Trust requirements or for any other reason, in its sole discretion.

## Customer Name and Signature

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 documentation to Energy Trust on Customer's behalf for all Energy Trust funding that is available for the energy-saving upgrades indicated on this application.



Customer signature

Full name (please print and use same name as on invoice)

Date

## Participating Organization Name and Signature

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 [Residential Specifications Manual](#) and all other Energy Trust program requirements.



Participating Organization signature

Full name (please print)

Date

Participating Organization company name

Install date

## Contractor Name and Signature

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 [Residential Specifications Manual](#) and all other Energy Trust program requirements.



Contractor signature

Full name (please print)

Date

Contractor company name

OCCB# or Washington License # (Non-trade ally only)

Install date

Company Address (To receive funding check)

City

State

Zip

### Residential

1819 SW 5th Ave #331 ♦ Portland, OR 97201-5277  
Phone 1.866.311.1822 ♦ Fax 1.866.516.7592  
[energytrust.org](http://energytrust.org)

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## Referral Section: Indicate project-completing organization and referring organization.

Project Completed by:	Referral Received from:

## Heating & Cooling

### Ductless Heat Pump Incentive

► One incentive per residence. Residence must be located in Oregon and primarily heated by PGE or Pacific Power.

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Ductless heat pump	Must have an HSPF2 of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution ( <a href="http://AHRI.net.org">AHRI.net.org</a> ) and <b>replace electric resistance heat</b> as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room).	<input type="checkbox"/> <b>\$2,000</b> Multifamily property <input type="checkbox"/> <b>\$1,800</b> Site built home <input type="checkbox"/> <b>\$3,500</b> Manufactured home <input type="checkbox"/> No-Cost, income-qualified option <b>Incentive amount requesting:</b>

AHRI Certificate Number:	Installed Cost \$:
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What type of heating system did this replace?  
(Systems displacing natural gas or any other non-electric fuel **will not** qualify for incentive.)

☐ Electric furnace    ☐ Electric radiant heat    ☐ Electric wall heat    ☐ Electric baseboard    ☐ Other:

### Outdoor Unit

Qty of outdoor units:	Total capacity (BTUs):	HSPF2:
Manufacturer:	Model Number:	Serial #:

### Indoor Unit

Qty of indoor units:	Primary Living Space Room Type:
Manufacturer:	Model Number***:

Did this project include ceiling cassettes or a concealed air handler serving a slim/short duct run? ☐ Yes ☐ No

Did the installation add heating to any previously unconditioned rooms? (multi-zone projects only) ☐ Yes ☐ No

Secondary Heat Source  
Is there an alternate, non-electric heating source being used to heat the primary living space? If so, what is it?\*\*

☐ Oil heater    ☐ Propane heater    ☐ Gas stove    ☐ Wood stove    ☐ Pellet stove    ☐ Gas fireplace  
☐ No secondary heating system present    ☐ Other:

\* Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.  
\*\* Presence of an additional non-electric heating source that serves the same primary living space as the ductless heat pump can reduce the amount of electric energy savings and impact the project's incentive amount.  
\*\*\* Invoice documentation for ductless heat pump projects must include all model numbers for the indoor and outdoor components of the system.

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Ducted Heat Pump		
► Residence must be located in Oregon and primarily heated by PGE or Pacific Power.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Ducted Heat Pump	HSPF2 <sup>1</sup> 7.50 or greater. Must be residence's primary heat source and <b>replace electric forced air furnace</b> . Thermostat lockout must be set to 35°F or lower if electric furnace auxiliary heat present. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. No-cost option requires pre-approval from <a href="mailto:communitypartners@energytrust.org">communitypartners@energytrust.org</a> .	<input type="checkbox"/> \$4,000 Site built home <input type="checkbox"/> \$5,000 Small multifamily site <input type="checkbox"/> No-cost, income-qualified option <b>Incentive amount requesting:</b>
<input type="checkbox"/> Extended capacity heat pump	Must be residence's primary heating source. <b>Not required to replace electric heat</b> . Heat pump must be a central ducted system included in Energy Trust's list of <a href="#">qualifying products</a> . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump <b>cannot</b> have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. <b>Indoor Configuration:</b> Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$2,000 Single family site <input type="checkbox"/> \$2,400 Small multifamily
<input type="checkbox"/> Extended capacity heat pump – <b>replacing electric forced air furnace</b>	Must replace electric forced air furnace as residence's primary heating source. Heat pump must be a central ducted system included in Energy Trust's list of <a href="#">qualifying products</a> . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump <b>cannot</b> have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. <b>Indoor Configuration:</b> Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$6,000 Single family site <input type="checkbox"/> \$6,650 Small Multifamily
What type of heating system did this replace? <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Other:		
AHRI Certificate Number:		Installed Cost \$
HSPF2:	EER2:	SEER2:
Manufacturer:	Model:	Serial #:

<sup>1</sup> Applicable HSPF2, EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at [energytrust.org/eestandards](https://energytrust.org/eestandards).

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Heat Pump Controls		
► Residence must be located in Oregon and primarily heated by PGE or Pacific Power.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> New Heat Pump Controls	(When replacing an existing heat pump with a new heat pump) Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's 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. <b>Cannot be combined with ducted heat pump incentive or other controls incentives.</b>	<input type="checkbox"/> \$250
<input type="checkbox"/> Existing Heat Pump Controls	Must be added to an existing heat pump with electric furnace auxiliary heat. Heat pump must be home's 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. <b>Cannot be combined with other controls incentives or ducted heat pump incentives.</b>	<input type="checkbox"/> \$250
Thermostat		
Lockout temperature: ° F		Installed Cost \$
Manufacturer	Model Name	Model #

Gas Furnace		
► Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Gas Furnace	95% 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.	<input type="checkbox"/> \$2,900
What type of heating system did this replace?		
<input type="checkbox"/> Functioning, non-condensing gas furnace <input type="checkbox"/> Electric Furnace <input type="checkbox"/> Oil <input type="checkbox"/> Other:		
ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No	AFUE: %	Installed Cost: \$
Manufacturer:	Model:	Serial #:

Smart Thermostat		
► Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Smart Thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump. Community Partner must indicate whether thermostat was connected to Wi-Fi. Visit <a href="http://www.energytrust.org/thermostat">http://www.energytrust.org/thermostat</a> for eligible models. Cannot be combined with other controls incentives.	<input type="checkbox"/> \$250
Thermostat		
Manufacturer:		Installed Cost \$
Model Name:		Model #:

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## Water Heating

### Heat Pump Water Heater

► Residence must be located in Oregon and primarily heat water with electricity provided by PGE or Pacific Power.

Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Heat Pump Water Heater	Eligible models must meet Northwest Energy Efficiency Alliance's (NEEA's) Advanced Water Heater Specification Tier 3 to qualify for this incentive. Tank may be any size. A midstream incentive may be available through retailers and distributors. No-cost option requires pre-approval from <a href="mailto:communitypartners@energytrust.org">communitypartners@energytrust.org</a> .	<input type="checkbox"/> \$240 <input type="checkbox"/> No-cost, income-qualified option Incentive request amount: \$
Water Heater		
Manufacturer:		Model:
Serial number:	UEF:	Installed cost:
Location installed: <input type="checkbox"/> Garage <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Main home <input type="checkbox"/> Other:		

## Weatherization

### Windows

- 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)
<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
<input type="checkbox"/> For enhanced CPF Windows Incentives, I have provided the Windows Addendum with Existing Condition form					
Supporting documentation must be attached to all window applications: <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"/> Accepted proof of U-Value:	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"/> Accepted proof of size:	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 with Existing Type</a> form.		

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Insulation in Manufactured Homes									
▶ Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Floor	R-11	R-22 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.45	<input type="checkbox"/> Up to \$1.76
Attic	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.13	<input type="checkbox"/> Up to \$1.74

Insulation in Single Family and Small Multifamily Homes									
▶ Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. ▶ Washington residences must be primarily heated by NW Natural.									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Wall (includes rim joist and knee wall)	R-4	R-11 or fill cavity	_____ sq.ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.32	<input type="checkbox"/> Up to \$3.30
• If applying for multiple wall insulation types, provide beginning R-value of wall insulation type with largest sq. ft installed. • For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities									
Floor	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.09	<input type="checkbox"/> Up to \$3.65
Attic (R0-R11)	R-11	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$3.00	
Attic (R-12 to R-18)	R-18	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$2.49	
Attic Insulation with Additional Costs	If this attic insulation project included any of the following costs that caused the project to cost more than \$3.00/sq. ft, <b>higher incentives may be available.</b> <b>Use the excel spreadsheet insulation calculator to identify the higher incentive option and submit the calculator in addition to this form</b> <i>Existing insulation must be R-18 or less. Must insulate to R-38 or greater or fill cavity.</i>							<input type="checkbox"/> Higher Incentive Option	



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Additional Funds		
<p>► Funds may be available for reducing customer costs for qualifying upgrades and/or repairs that are required to enable other upgrades identified on this form. Identify the additional funding source, select the relevant uses of funds, and input the related costs and incentive request amount. Cannot be layered with other Federal funding grants.</p>		
Funding Source	Requirements	Incentive
<input type="checkbox"/> Climate Equity and Resilience Through Action Grant (CERTA)-Federal Funds	<b>An insulation measure must be selected, above.</b> For single-family and manufactured homes. Provides up to \$2,000 in flexible funds for projects that include an insulation measure. Funds can be used to reduce customer costs for insulation or, if approved, for repairs enabling insulation or weatherization. Talk to your account manager for details.	Total Enabling/Repair Cost: \$
	<b>Use of funds:</b> <div><input type="checkbox"/> Reduce Customer Cost. <b>Insulation Cost Only</b> <div><input type="checkbox"/> Ductwork                      <input type="checkbox"/> Electrical                      <input type="checkbox"/> Enabling Upgrade <input type="checkbox"/> Hazard Mitigation           <input type="checkbox"/> Moisture                      <input type="checkbox"/> Weatherization <input type="checkbox"/> Other repair:</div></div>	Incentive Request: \$

## Terms and Conditions

**APPLICATION:** This application and any required additional documentation must be filled out completely, truthfully and accurately. Signers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. The Participating Organization must be in good standing in Energy Trust's Community Partner Funding program prior to Energy Trust processing or paying any funding.

**ELIGIBILITY:** Funding is available to detached single-family homes, manufactured homes, and eligible multifamily customers who are (i) Oregon residential electric service customers of Portland General Electric (PGE) or Pacific Power and (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, and (iii) Washington residential natural gas service customers of NW Natural. Funding for energy upgrades that help save on the cost of home heating are available to PGE and Pacific Power customers who heat their homes with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat their homes with natural gas. Funding for energy upgrades that help save on the cost of water heating are available to PGE and Pacific Power customers who heat their water with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat their water with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

**CUSTOMER:** The person signing this form is signing on behalf of the Customer. By signing this form, Customer certifies that they are eligible for Energy Trust services and funding.

**PROPERTY RIGHTS:** Customer represents that Customer has the right to authorize the installation of the energy upgrades on the property on which those upgrades were completed and/or installed and that any necessary consent was obtained.

**ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property and may review and evaluate the property during and after completion. Customer agrees to provide reasonable access to the property for the purposes described herein.

**INFORMATION RELEASE:** Customer agrees that Energy Trust may include Customer's name, Energy Trust services and resulting energy-savings in reports and other documentation submitted to Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, the Oregon Legislature, and/or other government agencies. The Participating Organization/Contractor understands and agrees that Energy Trust and/or its representatives may include a description of this application, including the company authorized representative's name, the company name, and tax documentation required by the Energy Trust Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, the Oregon Legislature, funding utilities, and/or other government agencies. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.



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**CUSTOMER NOTIFICATION:** Participating Organization will inform Customers that this service is provided as a part of Energy Trust's Home Retrofit or Existing Multifamily Programs and will provide Customers with information about Energy Trust and its programs. Participating Organization will also provide customers with its contact information, including phone number and address, to allow Customer to report any concerns or ask any questions about services under the Program.

**WORK QUALITY VERIFICATION:** Prior to any funding payment, Participating Organization will verify that the installed energy upgrades meet program requirements and Energy Trust weatherization specification standards. Outdoor temperatures may affect this verification process.

**PAYMENT:** Subject to funding availability, funding for eligible upgrades will be paid directly to the Participating Organization or Contractor after: (i) completion and or installation of the energy upgrades, (ii) verification of the completion and/or installation of the work or upgrades, and (iii) timely submission of all required documentation. **Please allow 4-6 weeks for incentive processing.** Failure to deliver all required information may result in a delay or withholding of payment.

**FUNDING AMOUNT:** Funding amount cannot exceed total cost of the upgrade(s) and their installation. Funding for energy upgrades completed and/or installed through Energy Trust programs are limited to the amounts provided by Energy Trust. Funding is subject to availability and may change. Current funding amounts can be found at [www.energytrust.org](http://www.energytrust.org). Contact Energy Trust with any questions.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed as a result of incentive payments. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

**NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor, or product. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

**ENERGY INFORMATION RELEASE:** Customer authorizes Energy Trust and the Participating Organization/Contractor signing this application to access utility energy usage data, including without limitation interval data, relating to the property on which energy-saving upgrades have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the Participating Organization/Contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the Participating Organization/Contractor signing this application to share information about the Customer's thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

**DISCLAIMER / NO LIABILITY:** Customer understands that, although Energy Trust may provide funding to Participating Organization or Contractor to support energy upgrades for the Customer, Energy Trust is not supervising work performed, nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products and upgrades purchased. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with the site visits, HEA, or upgrades. Energy Trust does not guarantee any particular energy savings by its approval of the application or by any other of its actions. Energy Trust's liability is limited to the amounts of any qualifying program incentive payment(s) and Energy Trust is not liable to Customer for any further amount or other damages.

## Residential

1819 SW 5th Ave #331 ♦ Portland, OR 97201-5277  
Phone 1.866.311.1822 ♦ Fax 1.866.516.7592  
[energytrust.org](http://energytrust.org)