

Energy Trust Community Partner Funding: Onboarding Checklist

Intended Audience: Organizations enrolling in Community Partner Funding

Purpose: This checklist describes typical enrollment/onboarding steps for prospective organizations. The 'Resource Checklist' column lists resources that should be received throughout onboarding.

How to Read This Checklist:

1. White Rows: These are enrollment/onboarding meetings to attend with Energy Trust Staff.
2. Blue Rows: These are actions to be completed by the organization.

How to Use This Checklist:

1. Check off 'Enrollment/Onboarding Steps' as you complete them
2. Check off each resource on the 'Resource Checklist' as you receive them and inquire if you are missing any. Copies of these resources can be found on the [Community Partner Funding Insider Page](#).

Meeting Duration	Enrollment/Onboarding Steps	Resource Checklist
30 minutes	<input type="checkbox"/> Step 1: Initial Outreach Meeting - Gauge organization's interest and identify collaboration opportunities	<input type="checkbox"/> CPF Overview Document <input type="checkbox"/> PI 320: CPF Program Information Sheet - Lists all CPF incentive levels and requirements
1-1.5 hours	<input type="checkbox"/> Step 2: Formal Outreach Meeting - Energy Trust leads outreach presentation - Discuss enrollment steps and organization capacity concerns (if any)	<input type="checkbox"/> Form 371: Participation Agreement - Required for enrollment, also requests a W9 and Certificate of Insurance <input type="checkbox"/> <i>Working Together Grant Application (optional)</i>
N/A	<input type="checkbox"/> Organization Completes Program Enrollment Emails completed Participation Agreement, W9 and Certificate of Insurance to communitypartners@energytrust.org	
1.5 hours	<input type="checkbox"/> Step 3: Home Energy Assessment (HEA) Onboarding	<input type="checkbox"/> 300 CPF: Customer Authorization - Must be submitted with each CPF project, collects customer and organization/contractor signatures <input type="checkbox"/> HEA Data Intake Form - Must be submitted with each HEA project, collects home energy information <input type="checkbox"/> HEA Training Presentation Slides - Describes how to complete and submit an HEA <input type="checkbox"/> Earth Advantage Online Training (if needed) - Additional training content on energy retrofit/health and safety home assessments
N/A	<input type="checkbox"/> Enrolled Community Partner Organization Completes Initial Home Energy Assessments - Emails completed '300 CPF' and 'HEA Data Intake Form' to communitypartners@energytrust.org	
1-1.5 hours	<input type="checkbox"/> Step 4: CPF Energy Upgrades Onboarding - Organization invites relevant subcontractors, if possible - Energy Trust outlines requirements for installing energy upgrades and requesting incentives	<input type="checkbox"/> CPF Overview Document (for contractors) - Program overview intended for subcontractors supporting CPF projects <input type="checkbox"/> CPF Project Details Form - Must be submitted with each energy upgrade project, to provide technical install details <input type="checkbox"/> CPF Onboarding Presentation Slides - Describes how to complete and submit CPF energy upgrade projects
N/A	<input type="checkbox"/> Enrolled Community Partner Organization Completes Initial Energy Upgrade Installs - Emails completed '300CPF', 'CPF Project Details Form', and project invoice(s) to communitypartners@energytrust.org	