



Community Partner Funding (CPF) Onboarding 2021

Agenda

- Review CPF Eligibility Requirements
- CPF Project Submission Steps
 - 300 CPF: Customer Authorization Form
 - Home Energy Assessment Submission Guidelines
 - Installed Energy Upgrade Submission Guidelines
- Next Steps for Initial Projects



CPF Project Eligibility

1. 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 must be serviced by: Pacific Power, PGE, Cascade Natural Gas, NW Natural, and/or Avista
2. 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.
3. Do you collaborate with your local Community Action Agency?
 - If so, let's discuss further.



CPF Project Eligibility in SW Washington

1. 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
2. Site must be served by NW Natural
3. Homes Heated by Wood, Oil or Propane
 - Incentives are generally only available for homes heated by gas. Let's discuss further if you have customers' homes heated by these alternate fuel sources.
4. Do you collaborate with your local Community Action Agency?
 - If so, let's discuss further.

CPF for Multifamily Properties

- CPF eligibility was extended to small multifamily properties in Oregon starting November 2021.
- CPF incentives may differ for small multifamily properties
 - Please reference the Program Information sheet for specifics
- For questions regarding multifamily properties contact: multifamily@energytrust.org
- For project support contact: Fredy Salazar, fsalazar@trccompanies.com

Specifications Manual

- To ensure quality work, all Energy Trust Trade Allies adhere to the Energy Trust Specifications Manual
 - The manual is available online in English and Spanish
- If you are working with a non-Trade Ally contractor, they must connect with an Energy Trust Account Manager to review this manual together.



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

2020 SPECIFICATIONS MANUAL

energytrust.org

Updated June 2020

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300 CPF: Customer Authorization Form

300 CPF: Customer Authorization Form

Page 1: 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**:

***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 (such as a townhome) | <input type="checkbox"/> Stacked structure with 5+ units |

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

300 CPF: Customer Authorization Form

Page 1: Check boxes for what measures were completed (ex. Home Energy Assessment) and *what measures may be completed in the future*

- By checking potential future measures (HVAC, etc) the customer authorization is applied to them, so this form can be re-used by a contractor for future CPF installs

Page 1: Also 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)

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

1. Is the Participating Organization requesting funding for any home energy upgrades?

- Yes
 No

1a. If **Yes**, please select which upgrades:

- | | |
|---|--|
| <input type="checkbox"/> Home Energy Assessment | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Insulation/Windows | <input type="checkbox"/> Duct Sealing/Repair |
| | <input type="checkbox"/> Water Heating |

2. Is a Contractor requesting funding for any home energy upgrades?

- Yes, Contractor to complete Signature Section B
 No, Contractor signature is not needed

2a. If **Yes**, please select which upgrades:

- | | |
|---|--|
| <input type="checkbox"/> Home Energy Assessment | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Insulation/Windows | <input type="checkbox"/> Duct Sealing/Repair |
| | <input type="checkbox"/> Water Heating |

Example 300 CPF: Page 1

- A participating organization completes a Home Energy Assessment.
 - They are submitting this 300 CPF for the first time and requesting HEA funding.
- The home is also eligible for a ductless heat pump (DHP) install, and a contractor that works with the participating organization may install one in the coming months.
 - The participating organization knows that contractor will request the incentive directly, if the install occurs.
 - *If the participating organization would rather request the DHP funding directly (once the install occurs), they would check the HVAC box in their section.*

| Home Energy Upgrade(s) | | |
|---|--|--|
| <p><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></p> | | |
| <p>1. Is the Participating Organization requesting funding for any home energy upgrades?</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> | | |
| 1a. If Yes, please select which upgrades: | <input checked="" type="checkbox"/> Home Energy Assessment | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Insulation/Windows | <input type="checkbox"/> Duct Sealing/Repair | <input type="checkbox"/> Water Heating |
| <p>2. Will a Contractor be requesting funding for any home energy upgrades?</p> <p><input checked="" type="checkbox"/> Yes, Contractor to complete Signature Section B upon completion of upgrade(s) <input type="checkbox"/> No, Contractor signature is not needed</p> | | |
| 2a. If Yes, please select which upgrades: | <input type="checkbox"/> Home Energy Assessment | <input checked="" type="checkbox"/> HVAC |
| <input type="checkbox"/> Insulation/Windows | <input type="checkbox"/> Duct Sealing/Repair | <input type="checkbox"/> Water Heating |

300 CPF: Customer Authorization Form

Page 2: Optional Demographic Survey

- Responses inform who CPF is reaching and can help maintain/grow funding for this program




| Optional Customer Demographic Information (If completed, choose all that apply) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------|--|--|--|--|----------------|---------|---------|----------|----------|----------|---|----------|----------|---|----------|----------|---|----------|----------|---|----------|-----------|---|----------|-----------|---|----------|-----------|-----------|----------|-----------|---|
| Income: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th colspan="3">2021 Moderate Income Chart (MIC)</th> </tr> <tr> <th>Household Size</th> <th>Minimum</th> <th>Maximum</th> </tr> </thead> <tbody> <tr> <td>1 person</td> <td>\$25,520</td> <td>\$51,966</td> </tr> <tr> <td>2</td> <td>\$34,480</td> <td>\$67,955</td> </tr> <tr> <td>3</td> <td>\$43,440</td> <td>\$83,945</td> </tr> <tr> <td>4</td> <td>\$52,400</td> <td>\$99,934</td> </tr> <tr> <td>5</td> <td>\$61,360</td> <td>\$115,922</td> </tr> <tr> <td>6</td> <td>\$70,320</td> <td>\$131,912</td> </tr> <tr> <td>7</td> <td>\$79,280</td> <td>\$134,910</td> </tr> <tr> <td>8 or more</td> <td>\$88,240</td> <td>\$137,909</td> </tr> </tbody> </table> | | | 2021 Moderate Income Chart (MIC) | | | Household Size | Minimum | Maximum | 1 person | \$25,520 | \$51,966 | 2 | \$34,480 | \$67,955 | 3 | \$43,440 | \$83,945 | 4 | \$52,400 | \$99,934 | 5 | \$61,360 | \$115,922 | 6 | \$70,320 | \$131,912 | 7 | \$79,280 | \$134,910 | 8 or more | \$88,240 | \$137,909 | <input type="checkbox"/> My household is experiencing income between the minimum and maximum as indicated in the MIC. <input type="checkbox"/> My household is experiencing income below the minimum income for my household size as indicated in the MIC.* <i>*I understand because of my income level, I am eligible to receive weatherization services and/or other energy upgrades from Oregon Housing and Community Services (OHCS) that may be available to me for free, but I still choose to participate in Community Partner Funding.</i> <input type="checkbox"/> Coronavirus Outbreak Related Disrupted Employment: Through June 30, 2021, income-qualified eligibility is extended to customers whose employment was impacted by COVID-19 and are eligible to receive assistance from local, state and/or federal government or eligible to participate in or a community-based emergency fund grant system <input type="checkbox"/> Prefer not to answer |
| 2021 Moderate Income Chart (MIC) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Household Size | Minimum | Maximum | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 person | \$25,520 | \$51,966 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | \$34,480 | \$67,955 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | \$43,440 | \$83,945 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | \$52,400 | \$99,934 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | \$61,360 | \$115,922 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | \$70,320 | \$131,912 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7 | \$79,280 | \$134,910 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 or more | \$88,240 | \$137,909 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Race and Ethnicity: (choose all that apply) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Asian <input type="checkbox"/> Black/African American <input type="checkbox"/> Hispanic/Latino/a/x <input type="checkbox"/> White <input type="checkbox"/> Native American/ Alaskan Indian <input type="checkbox"/> Native Hawaiian/Pacific Islander <input type="checkbox"/> Some other race: _____ <input type="checkbox"/> Prefer not to answer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Rural: | | Veteran: | Experiencing Disabilities: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Yes, I live in a rural area <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer | | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

300 CPF: Customer Authorization Form

Page 3: Signatures

Page 4-5: Terms and Conditions

- Customer and CP signatures are required for the initial home energy assessment.
- If the correct boxes were checked on page one, the customer and CP signature may be re-used for subsequent energy upgrade installs
- A contractor only needs to sign if they are receiving Energy Trust incentives directly.

| Customer Name and Signature | | | |
|--|--|----------------------|----------------------|
| <small>By signing below, Customer agrees to <u>all</u> 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 that Participating Organization/Contractor has completed for Customer.</small> | | | |
|  | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Customer signature | Full name (please print and use same name as on invoice) | Date | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Site Address | City | State | Zip |
| <input type="text"/> | <input type="text"/> | | <input type="text"/> |
| Customer email address | Customer phone | | |
| Participating Organization Name and Signature | | | |
| <small>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 Home Retrofit Specifications Manual and meet requirements as laid out in the program incentive guides found on Energy Trust's website.</small> | | | |
|  | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Participating Organization signature | Full name (please print) | Date | |
| <input type="text"/> | <input type="text"/> | | <input type="text"/> |
| Participating Organization company | Install date | | |
| Signature Section B: If a Contractor is requesting funding for a home energy upgrade, please sign below: | | | |
| Contractor Name and Signature | | | |
| <small>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. To receive funding, all work must comply with the Home Retrofit Specifications Manual and meet requirements as laid out in the program incentive guides found on Energy Trust's website.</small> | | | |
|  | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Contractor signature | Full name (please print) | Date | |

300 CPF: Customer Authorization Form

- Contractors, please note the following scenario:
 - The Participating Organization has completed a Home Energy Assessment for a client
 - The same client is now receiving a subsequent energy upgrade from a contractor
 - The contractor is requesting the Energy Trust incentive and must submit a 300 CPF
- If that energy upgrade was checked off on page 1 of the 300 CPF under the contractor section, the contractor may use the original 300 CPF from the Home Energy Assessment and simply fill out the contractor signature section.



Home Energy Assessment Project Submission



Home Energy Assessment: Required Paperwork

- Two submission documents

300 CPF:
Customer
Authorization
Form

HEA Data
Intake Form
(2-page)

- Email Completed Documents to communitypartners@energytrust.org
 - Please CC' your Energy Trust Account Manager
 - Subject Line: Include CP name and Site Address
 - Ex. "CPF Project: Habitat for Humanity: 100 SW Main Street"

Home Energy Assessment: Customer Education

Available Energy Trust Resources:

- Free LED Giveaway
- Home Energy Assessment Customer Recommendations Form
- Low/No-Cost Home Energy Improvements Flyer
 - Spanish-translated version available
- Energy Trust Infographic 'Accordions'
 - Educational brochures on water heating, weatherization, and space heating
 - Spanish-translated version available



Installed Energy Upgrade Project Submission

Energy Upgrade Installs: Required Paperwork

- Three submission documents

300 CPF:
Customer
Authorization
Form

Project
Invoice

CPF Project
Details Form

- Email Completed Documents:
 - communitypartners@energytrust.org
 - Please CC' your Energy Trust Account Manager
 - Subject Line: Include CP name, contractor name and site address
 - Ex. "CPF Project: Habitat for Humanity/Oregon Heating & AC CPF Project: 100 SW Main St."

Project Invoice Example – Community Partner Incentive Payee w/ No Customer Payment



Invoice is addressed to the Community Partner



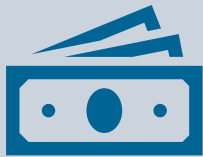
Invoice shows the final balance

Project Invoice Example –

Community Partner Incentive Payee w/ Remaining Customer Balance



Invoice is addressed to the customer



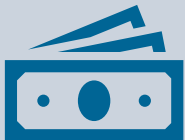
Invoice Includes

- Total installed cost (before incentives applied)
- Energy Trust incentive as a line-item discount
- Amount of CP co-funding contribution (if applicable)
- Remaining Customer Balance

Project Invoice Example – Contractor Incentive Payee



Invoice is addressed to the customer or CP



Invoice Includes

- Total installed cost (before incentives applied)
- Energy Trust incentive as a line-item discount
- Amount of CP co-funding contribution (if applicable)
- Remaining Balance (for customer or CP)

Project Invoice – Contractor Payee



Total installed cost (before incentives applied)



Energy Trust incentive as a line-item discount



Amount of CP co-funding contribution (if applicable)



Final Balance

Invoice Example – Contractor Payee

ABC

Invoice: 5555
December 13 2014

ABC Contracting
5432 A Street
Suite 321
Portland, OR 97205
Phone: 555-557-5309
Fax: 555-575-6410
www.ABC.com

TO:
Joe King
5555 Street Address
Suite 555
City, State 55555

| Sales Rep. | P.O. Number | Ship Date | Ship Via | FOB | Terms |
|------------|-------------|-----------|----------|-----|-------|
| | | | | | |

| Quantity | Description | Unit Price | Total |
|--------------|---|------------------------|-----------------|
| 1 | Attic Insulation 1360 square feet insulated from R-0 to R-38 | \$1.62 per square foot | \$836.00 |
| 1 | Energy Trust of Oregon Incentive | -.25 per square foot | -\$346.00 |
| Total | | | \$490.00 |

Make all checks payable to ABC CONTRACTING
THANK YOU FOR YOUR BUSINESS!

TO:
Joe King
5555 Street Address
Suite 555
City, State 55555

Energy Trust of Oregon
Incentive

Incentive amount
-\$346.00

CPF Project Details Form

- Requests technical information specific to each installed energy upgrade (gas furnace, windows, etc)

| Gas Furnace <i>Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.</i> | | | | | |
|--|--|---|------------------------|---|--|
| Upgrade type | | Requirements | | | |
| <input type="checkbox"/> | Gas furnace | Must be residence's primary heat source with AFUE of 90% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps, also known as hybrid systems. A CO monitor is required on every floor with a bedroom. | | | |
| ECM? | <input type="checkbox"/> Yes <input type="checkbox"/> No | AFUE: | <input type="text"/> % | Installed Cost: \$ <input type="text"/> | |
| Manufacturer: <input type="text"/> | | Model: <input type="text"/> | | Serial #: <input type="text"/> | |

| Windows <i>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.</i> | | | | | |
|---|-------------------------|--|--|------------------------------|--|
| Window type | Installed cost | U-Value | Total area installed | Total # of windows installed | |
| <input type="checkbox"/> U-Value ≤ 0.27 | \$ <input type="text"/> | U- <input type="text"/> | <input type="text"/> sq. ft. | <input type="text"/> | |
| <input type="checkbox"/> U-Value 0.28 - 0.30 | \$ <input type="text"/> | U- <input type="text"/> | <input type="text"/> sq. ft. | <input type="text"/> | |
| Supporting documentation must be attached to all window applications: <ul style="list-style-type: none"> • <i>Proof of U-Value for each window</i> • <i>Proof of size for each window</i> • <i>Paid in full purchase and install invoicing</i> | | <input type="checkbox"/> Accepted proof of U-Value: | Attach copies of the NFRC stickers for all windows installed OR 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 OR a completed Windows Addendum form. | | |

Next Steps

- Energy Trust to send:
 - 300CPF: Customer Authorization Form
 - Home Energy Assessment Data Intake Form
 - 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!

Contact Information:

Patrick Murphy, Program
Consultant

Patrick.murphy@clearesult.com
503-548-1623

Multifamily Contact Information:

Fredy Salazar, Energy Advisor
FSalazar@trccompanies.com
503-278-3010