

Community Partner Funding Overview

Overview

As stated in its [2020-2024 Strategic Plan](#), Energy Trust is committed to expanding the inclusivity of its program offers, especially to people with low and moderate incomes, communities of color and rural communities. A central tactic for this effort includes modifying program designs to allow for closer collaboration with community-based organizations (CBOs) and other agencies serving their community.

The newly created Community Partner Funding (CPF) pathway is a set of increased incentive offers exclusively to support programs for communities historically underserved by Energy Trust living in any of the three residence types:

- Detached single-family homes
- Existing manufactured homes
- Small multifamily properties, which includes attached residences, such as duplexes, triplexes, or fourplexes and side-by-side units with no residences above or below, such as a townhome

Eligibility is determined by who the organization or specific program serves. For an organization to be eligible for CPF, the organization must currently offer, or be developing an offer that targets one or more of the following:

- People experiencing low-to-moderate incomes (LMI)
- Communities of color
- Indigenous communities
- Rural communities
- Veterans
- People experiencing disabilities

Examples of eligible Community Partners (CPs) include CBOs, community action agencies, municipalities like housing authorities or economic development districts, and more.

With this offer, Energy Trust aims to become program allies with a variety of organizations with unique workflows and administrative capacities. For example, Energy Trust may:

- Provide incentives (or co-funding) to organizations who offer existing energy/home repair programs, to stretch their budget and serve more customers.
- Assist organizations to develop in-home upgrade programs that they install themselves or manage sub-contractors to complete on their behalf.
- Work collaboratively with organizations who serve as a community resource. These organizations may not directly provide energy related services but can act as a meaningful referral entity for their customers to specific Energy Trust trade allies for energy upgrades.

The goal is to provide a standardized set of offers to support energy-savings activities, while remaining flexible to the needs of the organizations and community while adhering to Energy Trust cost-effectiveness standards.

Incentives Available

The type, amount, and requirements of incentives can change year after year. Please refer to the Program Information sheet on the [CPF Insider Page](#) for current incentive amounts.

Reporting and Incentive Processing

Reporting and incentive processing procedures are intended to be flexible and adaptable to the CP's existing workflows.

The general workflow of a CPF project is as follows:

1. The partnering organization, or Community Partner (CP) will identify the participant and coordinate the install of energy upgrades.
2. In some cases, the CP may conduct a 'home energy assessment' to support customer education and identify potential for future upgrades.
3. The home energy assessment incentive is \$250 per home and helps cover the administrative costs for the CP to identify customers, confirm eligibility, conduct the assessment, and submit necessary project documentation.
4. CP or previously approved contractor will complete the work to Energy Trust specifications.
 - a. CP or contractor submits to Energy Trust a signed customer authorization form, project invoices, and required project details.
 - o For project details, Energy Trust can either extract the necessary processing information from the CP's existing forms or supply a project intake form that can be customized as needed.
5. Energy Trust will review and process the submitted incentive paperwork and issue payment in the form of an incentive check addressed to whomever funded the upgrade, either the CP themselves or a contractor, to lower the cost of the project for the CP or customer.

Forms

Community Partner Funding: Participation Agreement (Form 371CPF) – A one-time document used to establish program ally relationship between CP and Energy Trust.

Community Partner Funding: Customer Authorization Form (Form 300CPF) – Terms and conditions presented to and signed by the CP and customer who received incentivized home improvements.

Community Partner Funding for Program Allies Incentives (Form 320CPF) – A list of all home improvements eligible for CPF funding and a brief description of installation specifications and customer eligibility information

CPF Project Details Intake Form (Optional, and customizable per CP) – Captures necessary details of each home improvement to facilitate Energy Trust incentive processing.

To request copies of these forms, email communitypartners@energytrust.org.

Next Steps

Interested organizations can reach out to communitypartners@energytrust.org to describe their programs and who they serve. If the organization's work aligns with the intent of CPF, Energy Trust will arrange an orientation meeting to explore how to integrate CPF incentives into the organization's workflow.