

Community Partner Funding Overview

For Participating Contractors

Community Partner Funding Overview

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 at least one of the following:

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

Eligible organizations can connect with Energy Trust, and if approved, officially enroll as a Community Partner (CP).

Incentives Available

Please refer to the Program Information sheet on the [CPF Insider Page](#) for current incentive amounts.

- Please note that the type, amount, and requirements of incentives can change year after year. To request a Program Information sheet in the future, please reach out to your account manager or email communitypartners@energytrust.org

Eligible Customers

- Must be a client of a participating Community Partner (CP)
- Housing type must be either detached single-family home, existing manufactured home, or small multifamily.
- The home must be served by one of the participating Energy Trust utilities (Portland General Electric, Pacific Power, Cascade Natural Gas, NW Natural, or Avista)

CPF Projects

The general workflow of a CPF project is as follows:

1. **Customer Identification:** The CP will identify the participant and coordinate the install of energy upgrades.
 - In some cases, the CP may conduct a home energy assessment to support customer education and identify potential energy upgrades.

2. **Project Bid:** The CP will coordinate a site-visit from a referred contractor to provide a project bid.
 - Contractors will refer to Energy Trust eligibility requirements for each measure installation.
 - Any CPF-specific requirements are noted on the Program Information Sheet. For clarity, please note the following:
 - Customers receiving a gas furnace incentive must meet be income qualified in alignment with the [Savings Within Reach program](#).
 - Ductless heat pumps must be 1:1 systems. Additionally, if the home has a non-electric secondary heat source (wood stove, propane stove, etc), the potential CPF incentive is typically reduced to \$2,000.
 - The 'Tier 2' Attic Insulation offering through CPF provides a custom incentive intended to cover the install cost. Before beginning the project, bids should be submitted to the Community Partner who will verify the eligible incentive amount with Energy Trust.
 - The contractor is encouraged to bid each project in a cost-effective way that encourages a sustainable relationship with the Community Partner.
 - Unlike some Energy Trust promotions, there are no specific equipment requirements or fixed price maximums.
3. **Project Installation:** The referred contractor will complete the work and ensure adherence to the Energy Trust [Specifications Manual](#).
4. **Incentive Process:** To simplify and encourage customer participation, either the CP or the contractor must receive the Energy Trust incentive (not the customer).
 - CP-funded Project (contractor invoice is addressed to the CP):
 - If the CP is funding the full project costs, they will typically request to receive the CPF incentives directly. For this pathway, contractors are not required to be Energy Trust Trade Allies.
 - However, in some cases, the CPs may prefer that **the contractor** receives the funding and provides the customer an 'instant incentive'. For the contractor, this entails providing an up-front discount and then receiving the incentive 4-6 weeks later from Energy Trust directly.
 - This process requires contractors be enrolled as an Energy Trust Trade Ally, and additionally be a trained 'Instant Incentive' provider.
 - Any contractor with an active CCB license may become a Trade Ally. If interested, please reach out to your region's Energy Trust account manager.
 - Customer-funded Project (CP may contribute some funds, but the remaining balance is invoiced to the customer)
 - In this case, the contractor must be an Energy Trust Trade ally and an 'instant incentive' must be provided.
5. **Project Documentation:** CP or sub-contractor submits three documents for each project to Energy Trust at communitypartners@energytrust.org. **Please connect with your CP to understand which party is submitting what forms.**
 - 1) 300 CPF: Customer Authorization form
 - Page 1: Notes installed/planned upgrade(s) and who is requesting funding

- Page 2: Signed by the customer, CP, and contractor
 - Page 3: Optional Demographic Survey for the customer
- 2) Project invoices
 - Includes CPF Energy Trust incentive line-item reduction for 'instant incentive' projects
 - 3) CPF Project Details form
 - Please complete sections relevant to the installed measures
 - If the CP performed a Home Energy Assessment, the Utility Information and Site Information on page 1 may be skipped. Contractors should work with their relevant CPs to understand if Home Energy Assessments are always performed.
6. Energy Trust will review and process the submitted incentive paperwork and issue payment in the form of an incentive check addressed to whomever is noted on the 300 CPF Customer Authorization form.

Paperwork Required for Each Project:

- 300 CPF: Customer Authorization Form:
 - o Terms and conditions presented to and signed by each customer who received incentivized home improvements.
- CPF Project Details Form:
 - o Captures necessary details of each home improvement to facilitate Energy Trust incentive processing.
- Example 'Instant Incentive' CPF Invoice (shown below)
 - o Line-item notes the Energy Trust incentive deduction from the total price.

ABC Contracting
5432 A Street
Suite 321
Portland, OR 97205
Phone: 555-887-5309
Fax: 555-878-6410
www.ABC.com

Invoice: 5555
December 13 2014

TO:
Joe King
1234 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		-\$346.00
Total			\$490.00

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

Addressed to Customer or CP

Energy Trust of Oregon Incentive Line-Item

Incentive amount
-\$346.00