**Community Partner Funding: Project Details Form**

**Important Notices**

1. If the Participating Organization has already submitted a Home Energy Assessment for this client, the Participating Organization or contractor may omit the Utility Information and Site Information sections of this form.
2. This form can be customized at the request of the Participating Organization to only include measure sections that align with measures pursued by the Participating Organization.
3. Participating Organization may submit other documentation instead of this form, as agreed to by Energy Trust, that aligns with organization’s existing processes and meets Energy Trust data collection requirements.

**Table of Contents:**

* **Page 1: Customer, Community Partner, Utility, & Site Information**
* **Page 2-3: Heating & Cooling Project Details**
	+ Ductless Heat Pump
	+ Ducted Heat Pump
	+ Gas Furnace
	+ Heat Pump Controls
	+ Smart Thermostat
* **Page 4: Weatherization Project Details**
	+ Insulation
	+ Windows
* **Page 5: Water Heating Project Details**
	+ Gas Tankless Water Heater (Washington only)
	+ Heat Pump Water Heater

|  |
| --- |
| **Customer Information** |
| Customer Full Name:        |
|    Site address City State Zip |
| Site Ownership: [ ]  Owner occupied [ ]  A rental property owned by Customer [ ]  Customer is a rental tenant |
| Primary phone:  [ ]  Home [ ]  Work [ ]  Cell  |
| Email Address:  |
| **Community Partner Information** |
| Name of Participating Community Partner Organization:       |
| Has a Home Energy Assessment already been submitted to Energy Trust for this site? [ ]  Yes\* [ ]  No *\*If Yes, you may omit the following Utility and Site Information sections.* |
| **Utility Information** |
| Electric utility: [ ]  PGE [ ]  Pacific Power [ ]  Other       |
|  Gas utility: [ ]  NW Natural [ ]  Cascade Natural Gas [ ]  Avista [ ]  Other       |
| **Site Information** |
| Residence type: | [ ]  Single-family home[ ]  Manufactured home | [ ]  Rowhouse[ ]  Townhouse  | [ ]  Condo[ ]  Duplex | [ ]  Triplex[ ]  Fourplex |
| Year built: |  | Square feet: |  | Number of levels: |
| Primary heating system ***(check one)*** | [ ]  Electric furnace [ ]  Electric baseboard[ ]  Ducted heat pump | [ ]  Ductless heat pump[ ]  Gas furnace[ ]  Gas fireplace | [ ]  Wood[ ]  Propane[ ]  Other        |
| Water heating fuel: | [ ]  Electricity | [ ]  Natural gas  | [ ]  Propane |
| Foundation/basement | [ ]  Garage/basement combo[ ]  Crawlspace w/ vapor barrier | [ ]  Half basement[ ]  Crawlspace | [ ]  Full basement[ ]  Slab on grade |

**Heating & Cooling**

|  |
| --- |
| **Ductless Heat Pumps *One incentive per residence. Residence must be located in Oregon and primarily heated by PGE or Pacific Power.*** |
|  | **Upgrade type** | **Requirements** |  |
| [ ]  | Ductless heat pump | Must be **single-indoor head, single compressor (1:1)** inverter-driven system with an HSPF of 9.0 or greater and **replace electric resistance heat** as the residence’s primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room). |
| What type of heating system did this replace? | [ ]  Electric baseboard  | [ ]  Wall heat | [ ]  Electric furnace | [ ]  Other:        |
| Is an AHRI certificate attached to this application? [ ]  Yes [ ]  If no, provide information below: | Installed Cost $       |
| Qty of outdoor units:    | Qty of indoor units:     | Total capacity:       | HSPF:       |
| Outdoor unit | Manufacturer:       | Model:       | Serial #:       |
| Indoor unit  | Model:       | In what type of room was the primary indoor unit installed (e.g living room): |       |
| Is there a secondary heating system in the same room of the primary indoor unit? If so, select all that apply: | [ ]  Wood heating  | [ ]  Gas fireplace | [ ]  Other       |
| If a secondary heating system is present, how frequently is it used to heat the room during the heating season? | [ ]  Multiple times a week | [ ]  1-2 times a month | [ ]  1-2 times a season | [ ]  Never |

|  |
| --- |
| **Ducted Heat Pumps *Residence must be located in Oregon and primarily heated by PGE or Pacific Power.*** |
|  | **Upgrade type** | **Requirements** |  |
| [ ]  | Ducted heat pump | HSPF 8.5 or greater. Must be residence’s primary heat source and replace electric resistance heat.  |
| What type of heating system did this replace? | [ ]  Electric baseboard  | [ ]  Wall heat | [ ]  Electric furnace | [ ]  Other:        |
| Is an AHRI certificate attached to this application? [ ]  Yes [ ]  If no, provide information below: | Installed Cost $       |
| HSPF       | EER       | SEER       |
| Manufacturer       | Model       | Serial #       |

|  |
| --- |
| **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** |  |
| [ ]  | 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? | [ ]  Yes  | [ ]  No | AFUE: |      % | Installed Cost: $      |
| Manufacturer: |       | Model: |       | Serial #:      |

|  |
| --- |
| **Heat Pump Controls *Residence must be located in Oregon and primarily heated by PGE or Pacific Power.*** |
|  | **Upgrade type** | **Requirements** |  |
| [ ]  | New heat pump controls | Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home’s primary heat source. Visit <http://www.energytrust.org/heatpumpcontrols> for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. **Cannot be combined with ducted heat pump incentive or other controls incentives.** |
| [ ]  | 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 <http://www.energytrust.org/heatpumpcontrols> for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. **Cannot be combined with other controls incentives or ducted heat pump incentive.** |
| **Thermostat** | Lockout temperature set to 35º F? | [ ]  Yes | [ ]  No | Installed Cost $       |
| Manufacturer       | Model Name       | Model #       |

|  |
| --- |
| **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** |  |
| [ ]  | 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 Wifi. Visit <http://www.energytrust.org/thermostat> for eligible models. Cannot be combined with other controls incentives. |
| **Thermostat** | Manufacturer:       | Installed Cost $       |
| Model Name:       | Model #:       |

**Weatherization**

|  |
| --- |
| **Insulation1 *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 type1** | **Max beginning R-value** | **Insulate****to:** | **Quantity installed** | **Beginning****R-value** | **Ending****R-value** | **Cavity****filled?** | **Installed cost** |
| Wall(includes rim joist and knee wall) | R-4 | R-11 or fill cavity |       sq.ft.(total of all types) | R-    | R-    | [ ]  | $      |
| * **If applying for multiple wall insulation types, provide beginning R-value 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**
 |
| Attic (Tier 1) | R-11 | R-38 |       sq.ft. | R-    | R-    | - | $      |
| Attic (Tier 2): *Please submit the excel spreadsheet calculator instead of this form* |
| Floor | R-0 | R-30 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      |

1 Manufactured homes are not eligible for attic (Tier 1), wall, knee wall or rim joist insulation incentives. All exterior wall surfaces must be insulated to qualify for wall insulation. Attic insulation must be R-19 or higher for knee wall insulation to be eligible for an incentive.

|  |
| --- |
| **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** |  |
| [ ]  U-Value < 0.24 | $      | U-.     |      sq. ft. |        |  |
| [ ]  U-Value 0.25 – 0.27  | $      | U-.     |      sq. ft. |        |  |
| [ ]  U-Value 0.28 - 0.30 | $      | U-.     |      sq. ft. |        |  |
| **Supporting documentation must be attached to all window applications:** * ***Proof of U-Value for each window***
* ***Proof of size for each window***
* ***Paid in full purchase and install invoicing***
 | [ ]  | **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. |
| [ ]  | **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](https://www.energytrust.org/wp-content/uploads/2016/10/HES_FM_WindowsAddendum.pdf) form. |

**Water Heating**

|  |
| --- |
| **Gas Tankless Water Heater *Hybrid water heaters do not qualify. Residence must be located in Washington and primarily heat water with natural gas provided by NW Natural.*** |
|  | **Upgrade type** | **Requirements** |  |
| [ ]  | Gas tankless water heater  | Uniform Energy Factor (UEF) must be 0.81 or greater. A CO monitor is required on every floor with a bedroom. |
| **Water heater** | Manufacturer:       | Model:       | UEF:       |
| Serial number:       | Installed cost:       |

|  |
| --- |
| **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** |  |
| [ ]  | Heat pump water heater  | Eligible models must meet Northwest Energy Efficiency Alliance’s (NEEA’s) Advanced Water Heater Specification Tier 3 and **replace an existing electric water heater**. Tank may be any size.  |
| **Water heater** | Manufacturer:       | Model:       | UEF:       |
| Serial number:       | Installed cost:       |
| Location installed:  | [ ]  Garage[ ]  Basement | [ ]  Crawlspace[ ]  Main home | Other:       |