



# ONBOARDING GUIDE CPF CONTRACTOR & TRADE ALLY

FOR USE BY CPF PARTNERS WHEN ONBOARDING AND TRAINING CONTRACTORS

This guide helps Community Partner Funding (CPF) partners effectively onboard new contractors and trade allies to their programs. It ensures contractors understand CPF goals, incentives, technical requirements, and quality standards.

## 1. OVERVIEW OF CPF

CPF provides funding to upgrade and weatherize homes for income-qualified households, leveraging incentives from Energy Trust of Oregon. Partners conduct outreach, coordinate projects, and can work with contractors/trade allies to deliver high-quality installations.

### Service Territory

CPF projects must be within the territories of:

- Portland General Electric (PGE)
- Pacific Power
- NW Natural
- Avista

### Key Measures Offered

- Ductless heat pumps
- Ducted heat pumps
- Heat pump water heaters
- Insulation (attic, wall, floor)
- Air sealing

### Incentive Structure

- CPF incentives are higher than standard Energy Trust incentives.
- Incentives are either paid to the partner, who pays the contractor, or are paid directly to Energy Trust enrolled trade allies.
- Projects must meet income eligibility and technical requirements.
- Measure-specific cost caps and documentation requirements apply.

### Partner Role vs. Contractor Role

- **Partner role:** Customer intake, eligibility verification, project coordination and home energy assessment paperwork submission to Energy Trust. Community partners can install eligible measures if they are enrolled as trade allies.
- **Contractor/trade ally role:** Install measures to Energy Trust standards, provide documentation and comply with inspection/QA requirements. May provide home energy assessment if approved by community partner.

## 2. CONTRACTOR SELECTION CRITERIA

### Good Qualities in a Contractor

- **Technical Expertise:** Certified/licensed in relevant trades (e.g., HVAC, insulation, plumbing, electrical)
- **Experience with Income-Qualified Programs:** Understands working in occupied homes with diverse households
- **Compliance-Oriented:** Follows CPF specifications, building codes and safety standards
- **Customer Service Skills:** Communicates respectfully and clearly with clients and partners
- **Documentation Reliability:** Provides complete and accurate forms, photos and specs
- **Willingness to Coordinate:** Works with multiple funding layers and understands scheduling flexibility

### Red Flags to Watch for:

- Incomplete or inaccurate documentation on past projects
- Resistance to CPF technical requirements
- History of failed QA inspections
- Poor communication with clients or partners
- High staff turnover without adequate training
- Unwillingness to work within incentive budget/cost cap guidelines
- Lack of proper licensing, insurance or bonding

## 3. TECHNICAL TRAINING TOPICS FOR NEW CONTRACTORS

### Partners should ensure each contractor receives training or a briefing on:

- CPF incentives and eligibility
- How CPF differs from standard Energy Trust offers
- Current incentive amounts and cost caps
- Income verification process (partner-managed)
- Measure-specific requirements
- Technical standards
- Installation standards (HVAC sizing, duct sealing, insulation R-values)
- Approved equipment lists
- Building code compliance
- ANSI/BPI-1200 and Energy Trust specifications (if home performance auditor)

### Project Documentation

- Required forms (e.g., 300CPF, 320CPF, window addendum)
- Pre/post photos and equipment model numbers
- QA inspection process and timelines

### Health and Safety

- Lead/asbestos awareness
- Electrical panel limitations
- Combustion safety testing (if applicable)
- COVID-19 or other safety protocols

### Working in Vulnerable Communities

- Cultural competency
- Trauma-informed interaction with clients
- Respecting client property and privacy

#### 4. AGREEMENTS & EXPECTATIONS

Before starting work, it is strongly encouraged for partners to have a written agreement (MOU) with the contractor that includes:

- **Scope of Work:** Which measures the contractor is authorized to install
- **Adherence to Requirements:** Agreement to meet the community partner's grant or program specifications
- **Documentation Standards:** Photos, model numbers, serial numbers, signatures
- **Scheduling Protocols:** Communication timelines with the partner
- **Payment Terms:** Understanding when payments may be released by each funding source
- **QA/Inspection Compliance:** Agreement to correct deficiencies at no additional cost
- **Confidentiality and Professional Conduct:** Protecting client information and treating clients respectfully
- **Termination Clauses:** Grounds for ending the relationship

#### 5. ONBOARDING CHECKLIST FOR PARTNERS

##### **Before First Project:**

- Verify licensing, insurance, bonding
- Provide CPF overview packet (incentive overview, program overview, forms)
- Walk through at least one sample project in detail
- Review quality expectations
- Set up communication channel (email, phone, shared folder)

##### **First Project:**

- Partner staff check in on-site
- Review documentation before submission
- Give immediate feedback on any missing info

##### **After First 2-3 Projects:**

- QA will be preformed by the Energy Trust Quality Assurance team and results will be reviewing with installing contractors
- Adjust processes if needed
- Confirm the contractor understands and meets expectations