



CPF PROJECT SUBMISSIONS OVERVIEW

INCENTIVE PROGRAM FOR COMMUNITY PARTNERS

WHO IS THIS FOR?

Energy Trust Community Partner Funding (CPF) organization staff who have attended incentive processing training or orientation.

WHAT IS COMMUNITY PARTNER FUNDING (CPF)?

Energy Trust partners with community organizations to provide low-cost to no-cost energy-saving upgrades, improving affordability, comfort and safety for people living in rural areas, and/or who are income-qualified and/or communities of color.

RESOURCES

- Energy Trust's Community Partner Insider page: [Home Retrofit](#) | [Energy Trust Insider](#)
- Enrollment and training resources are available in the Enrollment & Onboarding section, including:
 - Enrollment and onboarding materials
 - Home Energy Assessment resources
 - Technical resources
 - Program and project resources
- Under the Project Paperwork tab, you can find all the paperwork you will need to submit projects for incentive reimbursements including:
 - Home Energy Assessment forms (Form 300CPF)
 - Incentive Request Form (Form 320CPF)

Find an overview of the community partner standard incentive requirements and amounts here. Please note the distinction between the standard outlined within this information sheet and Energy Trust "no cost" incentives.

Program Incentive Guide: To see all available CPF incentives and requirements

- [Program Information sheet: PI0320CPF](#)
- [Residential Program Incentive guide Washington: PI0320CPF-WA](#)

Enrollment & Onboarding

Project Paperwork

Marketing

Reimbursements

Organizations interested in enrolling in Community Partner Funding (CPF) 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.

Enrollment Resources

- [CPF Overview document \(for community-based organizations\)](#)
- [CPF Overview document \(for supporting contractors\)](#)
- [CPF Participation Agreement-Form 371CPF \(PDF\)](#)
- [Multifamily Participation Agreement addendum-Form 371CPF-A \(PDF\)](#)

Onboarding Resources

- [CPF Onboarding presentation \(PDF\)](#)
- [CPF Onboarding checklist \(PDF\)](#)

SUBMITTING PROJECTS AND TIMELINES

When sending a request for pre-approval, calculators, estimates or completed final paperwork, please send to:

communitypartners@energytrust.org.

When asking a general question (eligibility, allocation, meeting requests, etc.), please send to: cpfsupport@energytrust.org.

Processing timeline

- Once a project has been submitted, it takes 4-6 weeks for mailing payment. If additional information is needed, we will reach out to you and/or the trade ally who submitted final paperwork via email. *Any missing information can delay processing.*

Email subject line formatting

To receive the quickest response, please format the subject line of your emails as outlined below.

- **For requesting pre-approval or completed final paperwork:**
Organization name (PRE-APPROVAL, EXCEPTION or FINAL SUBMISSION): Customer street address
Examples: EXCEPTION REQUEST: 1234 Main St.
HEA & PRE-APPROVAL SUBMISSION: 1234 Main St.
- **Special handling requirements (if applicable):** For special handling requirements or agreements, please include your organization's name in the subject line.
- **For questions:**
Organization Name: What is the subject of the question?
Example: Sustainability Bridge: Eligibility?

ADDITIONAL TIPS

- For **insulation**, use the appropriate calculator (**insulation**) to estimate incentives. We are always happy to assist with the first few projects and/or complex cases.
- For **windows**, CPFSupport@energytrust.org can help review and confirm incentive for the enhanced window offer.
- When requesting **"no cost" funding**, specify how any remaining costs will be covered (partner funds, CERTA, ODOE, CHPDP, etc.).
- Submit all documents in DOC, PDF or JPEG format.
- For **extended-capacity heat pumps**, ensure models are on our qualified products list and match side by side.
- **Exceptions** may be available for projects that fall outside of Energy Trust eligibility. This can include cost exceptions, equipment exceptions, income exceptions and special cases. Exceptions are not available for customers that are outside of Energy Trust services territory. Exceptions are a great way for partners to identify special cases and considerations that are outside of the program requirements. Exceptions can help inform future designs of measures and offers.