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| **Community Partner/Contractor Name** |
| **Home Energy Advisor Name** | **Date** |

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| **Home Energy Assessment Overview** |
| **Customer Name:** |
| **Customer Address** (Street, City, State, Zip):  |
| Checkbox Crossed**Baseload Energy Use** Checkbox Checked1. Lighting: GoodReplace with LEDs

Checkbox CrossedCheckbox Checked1. Water fixtures: Good Replace with low-flow fixtures

Easy Baseload Tips:**[ ]** Plug electronics into power strips that can be turned off when not in use**[ ]** When it’s time to replace appliances, choose ENERGY STAR certified models |
| **Space and Water Heating**Checkbox CrossedToolsCheckbox Checked1. Heating System Status: Good Maintenance/Repair Recommended Replace/Upgrade

Easy Heating System Tips: **[ ]** Recommended thermostat settings: 65 or lower in winter, 78 or higher in summer**[ ]** Schedule annual tune-ups with a HVAC contractor**[ ]** For forced air systems, change the filter when dirty, about 3-6 monthsCheckbox CrossedToolsCheckbox Checked1. Water Heater Status: Good Maintenance/Repair Recommended Replace/Upgrade

Easy Water Heating Tips:**[ ]** Use water savings showerheads and faucet aerators**[ ]** Use cold water when possible for washing clothes |
| **Weatherization:**Checkbox CrossedCheckbox Checked1. Attic Insulation Status: Good Replace/Upgrade

Checkbox CheckedCheckbox Crossed1. ToolsWindows Status: Good Maintenance/Repair Recommended Replace/Upgrade

Easy Weatherization Tips:**[ ]** Install weatherstipping along the perimeter of the attic access hatch**[ ]** Caulk any gaps around windows where the window frame meets the wall |
| Priority upgrades for your home: |
| Other Home Assessor Notes: |

**Customer Recommendations**

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| **Reduce Your Utility Bills!****Energy Saving Improvements**  |
| This section below is for the home energy advisor to suggest energy saving improvements for your home. Suggestions below may be eligible for rebates through Energy Trust of Oregon. In general, larger discounts are available for rental properties and income-qualifiedcustomers.**On-Bill Repayment:** Call 1.888.231.2170 to learn how you can finance an upgrade through your utility bill. The energy savings may offset much of the loan cost, so customers could see little to no increase on their energy bill.Relevant opportunities through local organizations and their contact information will also be shared below when possible. **Call 1.866.368.7878 to learn about eligible rebates through Energy Trust.** *Representantes que hablan inglés y español están disponibles para atender sus llamadas y ayudarlos con sus preguntas.* |

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| **No-Cost Upgrades** |
| 1. **[ ]  Manufactured Home**

 **Duct Sealing**  | Requirements: MUST be a manufactured home |
| Why get duct sealing? | Testing and sealing your ductwork can also help trim your energy costs and improve indoor air quality. |
| How can I get free duct sealing? | Please call 1.866.368.7878 or contact the Energy Trust Trade ally listed below |
| Local Energy Trust Trade Ally (if applicable):  |
| 1. **[ ]  Community Action Agency**

 **No-Cost Retrofits** | Requirements: must meet community action agency income guidelines. |
| Why reach out to a community action agency? | Community action agencies can provide free weatherization and home retrofit repairs to reduce your energy bills and increase home comfort.  |
| How can I learn more? | Contact the local community action agency listed below to determine your eligibility. |
| Local Community Action Agency Name and Contact:  |

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| **Low-Cost Upgrade** |
| 1. **[ ]  Smart Thermostat**
 | Requirements: existing heating system must be forced air. |
| **Why get a smart thermostat?** | Smart thermostats can help you reduce energy costs and keep your home comfortable year-round. Smart thermostats use sensors to tell when you’re away and can learn your daily schedule and even use local weather information to make energy-saving temperature changes automatically. |
| **How do I order a discounted smart thermostat?** | Call 1.866.368.7878 to learn how to receive Energy Trust discount |
| Relevant Local Promotion:  |

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| **Heating and Cooling Energy Upgrades** |
| Heating and cooling consume a majority of the home’s energy. Switching to a high efficiency system can be the most cost-effective energy upgrade you can make. |
| 1. **[ ]  High Efficiency Ducted Heat Pump**
 | Must replace electric resistance forced air furnace |
| Why upgrade your electric furnace to a ducted heat pump? | Heat pumps deliver consistent comfort and save a considerable amount of energy by moving heat in or out of your home depending on the season. Because they move heat rather than generating it, you can shave as much as 50 percent off your heating and cooling costs |
| How can I get a discounted ducted heat pump? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Energy Trust Promotion: [ ]  Manufactured Homes promotion discount of up to 60% with a $3,000 discount |
| Relevant Local Promotion: [ ]  |
| 1. **[ ]  Ductless Heat Pump**
 | Must replace electric forced air furnace or electric zonal |
| Why install a ductless heat pump? | You can cut heating costs by up to 40 percent with an efficient ductless heat pump system. Plus, air conditioning comes as standard, for year-round comfort. |
| How can I get a discounted ductless heat pump? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Energy Trust Promotion: [ ]  Rental Properties ONLY: receive discounts of up to 40%, reducing out-of-pocket costs to $2,500 or less |
| Relevant Energy Trust Promotion: [ ]  Manufactured Homes ONLY: receive discounts of up to 60% with a $2,500 discount |
| Relevant Local Promotion: [ ]  |
| 1. **[ ]  High Efficiency Gas Furnace**
 | Requirements: must have existing gas heat. |
| Why upgrade to a high efficiency gas furnace? | Your new gas furnace will deliver clean, consistent heat while using less energy overall, so you can enjoy a cozier home, bigger energy savings and lower monthly bills. |
| How can I get a discounted gas furnace? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Energy Trust Promotion: [ ]  Redeem a $550 rebate in Oregon on a high efficiency gas furnace for rental properties or income-qualified customers |
| Relevant Local Promotion: [ ]  |

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| **Electric Water Heating Upgrade** |
| Between the bath, kitchen and laundry room, hot water is always in demand, making up 20 percent of the average home’s energy bill. Installing a high efficiency water heater is a great way to lower those costs and enjoy dependable hot water without worry. |
| 1. **[ ]  Heat Pump Water Heater (HPWH)**
 | Requirements: Must replace traditional electric resistance water heater |
| Why replace your electric resistance water heater with a HPWH? | ENERGY STAR® estimates water heating is the second-largest energy user in a home, costing the average household $250 to $400 annually. You can reduce your water heating costs by up to 50 percent when you replace your electric tank water heater with a heat pump water heater. |
| How can I get a discounted HPWH? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Energy Trust Promotion: [ ]  Income-qualified customers and rental properties in Oregon can redeem a $270 rebate on a heat pump water heater install |
| Relevant Local Promotion: [ ]   |

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| **Shell Upgrades** |
| 1. **[ ]  Attic Insulation**
 | Requirements: Must be a site-built home and have less than R-11 existing in the attic |
| Why install more insulation? | Insulation is one of the most cost-effective ways to protect your home against the elements. The better the insulation, the less your heating and cooling system has to work to maintain comfortable temperatures.If your home is older than 1985, your home could likely benefit from more insulation in the floor, walls, and attic. |
| How can I get a discount on insulation? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Energy Trust Promotion: [ ]   |
| Relevant Local Promotion: [ ]   |
| 1. **[ ]  Windows**
 | Requirements: new windows must meet efficiency specfication (U-value of 0.30 or less) |
| Why install new windows? | Benefits of new windows include: lower energy costs, increased comfort, reduced drafts/condensation, reduced noise, and improved heating and cooling performance.  |
| How can I get a discount on insulation? | Call 1.866.368.7878 to learn how to receive an Energy Trust discount and find a contractor.  |
| Relevant Local Promotion: [ ]   |
| 1. **[ ]  Manufactured Home Replacement**
 | Requirements: Manufactured Home must be older than 1995. |
| Why replace your older manufactured home? | Federal standards for energy efficiency in manufactured homes were minimal or non-existent before 1995. Instead of retrofitting older manufactured homes with efficiency measures, replacing the home entirely can be the most durable and cost-effective solution. |
| How can I learn more? | Email a program representative at mhreplacement@energytrust.org or call 503.548.1635 |
| Relevant Energy Trust Promotion: [ ]  Receive discounts of up to $17,500 to replace your old manufactured home with a new efficient one. |

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