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| **By signing this authorization**, Customer, Participating Organization and Contractor (if applicable) confirm that (i) Participating Organization or Contractor may invest Energy Trust’s funds for the energy-saving upgrades that Participating Organization or Contractor may complete for Customer at the site address below. Participating Organization and/or Contractor is responsible for qualifying and installing energy upgrades and managing reimbursement from Energy Trust. Customer agrees that Energy Trust or Participating Organization may share Customer’s contact information with Contractors for the express purpose of coordinating estimates for installing energy upgrades as approved by Customer. To be eligible for Community Partner funding, this authorization must be signed by Customer and Participating Organization or Contractor\* (if applicable) and be returned with other applicable supporting documentation to verify the work has been completed.  |

\**If Participating Organization completes and signs this form as part of an initial Home Energy Assessment, the Participating Organization’s signature may be omitted on subsequent* **Form****300CPF** *submissions. (Contractor must write Participating Organization’s name in the box marked ‘Participating Organization Company’ to connect each subsequent* **Form****300CPF** *submission to Participating Organization.)*

Customer, Participating Organization and Contractor (if applicable) understand and agree that, if this authorization form is signed, then Energy Trust will issue the funding check for energy upgrades that meet Energy Trust requirements to the Participating Organization or Contractor named below at the address listed below. Accordingly, Customer directs Energy Trust to provide any funding to which it might otherwise qualify to the Participating Organization or Contractor named below and waives all rights to directly receive such Energy Trust funding for the identified Home Energy Upgrade(s). Notwithstanding anything to the contrary, Energy Trust may deny funding for any energy upgrades that do not meet Energy Trust requirements or for any other reason, in its sole discretion.

**Rental Property Owners**: *To be eligible for incentives, property owners must comply with applicable state and local affordability protections including adherence to Oregon Senate Bill 611 rent increase caps and tenant relocation assistance requirements. It also includes requirements to rent to income-qualified tenants at affordable levels, refrain from evicting tenants or raising rents due solely to energy improvements, and to comply with any affordability provisions for at least two years following receipt of incentives. Rental property owners additionally agree to comply with all laws and stipulations in tenant leases regarding notifications and access to tenant units receiving incentivized Home Energy Assessments or upgrades. By signing below, rental property owners acknowledge they have reviewed and will comply with all federal, state, and local laws and requirements associated with applied incentives.*

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| **Funding Agency Job ID\*\*:**      *\*\*To be completed by utility rate payer funded organizations only. This may be the Oregon Housing and Community Services (OHCS) Job ID. Leave blank if organization does not report project information to OHCS.* |

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| **Residence Type** (Please select the residence type) |
| [ ]  Detached, Single-Family Home [ ]  Manufactured Home [ ]  Duplex, Triplex, or Fourplex [ ]  Side-by-side unit with no residences above or below, such as a townhome |
| **Home Energy Upgrade(s)** |
| *Participating organization(s) will indicate the scope of work agreed upon with the customer in this section. The customer signature on this form will apply to all upgrades in this section. If subsequent work does not fall into one of the checked categories, a second work authorization form will be required with the customer and Participating Organization/contractor signature* |
| **1. Is the Participating Organization requesting funding for any home energy upgrades?** | [ ]  Yes [ ]  No |
| **1a.** **If *Yes*, please select which upgrades:** | [ ]  Home Energy Assessment [ ]  HVAC [ ]  Duct Sealing/Repair[ ]  Insulation/Windows [ ]  Water Heating |
| **2. Will a Contractor be requesting funding for any home energy upgrades?**[ ]  **Yes**, Contractor to complete Signature Section B upon completion of upgrade(s)[ ]  **No**, Contractor signature is not needed |
| **2a.** **If *Yes*, please select which upgrades:** | [ ]  Home Energy Assessment [ ]  HVAC [ ]  Duct Sealing/Repair[ ]  Insulation/Windows [ ]  Water Heating |

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| **Customer Name and Signature** |
| *By signing below, Customer agrees to all of the terms and conditions on this form. Customer authorizes Participating Organization/Contractor to submit this authorization and all required invoices or measure documentation to Energy Trust on Customer’s behalf for all Energy Trust funding that is available for the energy-saving measures indicated in the Home Energy Upgrade section (Pg.1) that the Participating Organization/Contractor has or will complete.* |
|             Attention **Customer signature Full name** (please print and use same name as on invoice) **Date**                       **Site Address City State Zip**              **Customer email address Customer phone** |

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| **Participating Organization Name and Signature** |
| *By signing below, Participating Organization certifies that this authorization, accompanying invoice(s) and measure documentation are complete and accurate, and that all improvements associated with this funding request were completed as of the signature date below. To receive funding, all work must comply with the* [*Residential Specifications Manual*](https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf) *and meet requirements as laid out in the* [*program incentive guide*](https://insider.energytrust.org/programs/home-retrofit/forms/)*s found on Energy Trust’s website.**\*By signing below, Participating Organization acknowledges that subsequent* **Form 300CPF** *submissions may be submitted by Contractor without first obtaining the signature of Participating Organization as described on page 1 of this form.* |
|              Attention **Participating Organization signature Full name** (please print) **Date** |
|               **Participating Organization company**  **Home Energy Assessment Date** |

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| **Signature Section B:** If a Contractor is requesting funding for a home energy upgrade, please sign below: |
| **Contractor Name and Signature** |
| *By signing below, Contractor certifies that this authorization, accompanying invoice(s) and measure documentation are complete and accurate, and that any improvements that the Contractor requests funding for were completed as of the signature date below. Contractors must attend the Energy Trust Home Specifications Manual Training. To receive funding, all work must comply with the* [*Residential Specifications Manual*](https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf) *and meet requirements as laid out in the* [*program incentive guide*](https://insider.energytrust.org/programs/home-retrofit/forms/)*s found on Energy Trust’s website.* |
|              Attention **Contractor signature Full name** (please print) **Date** |
|                    **Contractor company OCCB# or Washington License #** (Non-trade ally only) **Install date**                       **Company Address (To receive funding check) City State Zip** |

**If a Home Energy Assessment is performed, Community Partner or Contractor must complete the information below:**

|  |
| --- |
| **Community Partner Name** |
| **Home Energy Advisor Name** | **Date** |

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| **Participant Information** |
| Participant Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Participant Type: [ ] [ ]  Homeowner [ ]  [ ] Renter [ ]  Rental Property Owner/Manager |
| **Site Information** |
| Electric Provider: [ ]  Pacific Power [ ]  PGE [ ]  Other  |
| Gas Provider: [ ]  NW Natural [ ]  Avista [ ]  Cascade Natural Gas [ ]  Other  |
| Year Built \_\_\_\_\_\_\_ Sq. Ft. # Stories  |
| Foundation/Basement: [ ]  Garage/basement combo [ ]  Crawlspace [ ]  Crawlspace w/ vapor barrier  [ ]  Half basement [ ]  Full basement [ ]  Slab on grade  |
| **Home Energy Systems Information** |
| 1. **Heating Systems (please check off all heating systems in the home)**
 |
| [ ]  Electric Heat: [ ]  Elec Resistance Forced Air (Furnace) [ ]  Elec Resistance Zonal (Baseboard, Cadet, etc) [ ]  Heat Pump |
| [ ]  Natural Gas Heat: [ ]  Forced Air (Furnace) [ ]  Boiler [ ]  Other  |
| [ ]  Other Heat (propane, oil, wood, etc):  |
| **Primary:** Which heating system heats the primary living space (e.g. living room, great room, etc.):  |
| *If ‘Other’ Primary Heat, is a replacement recommended?* [ ]  *Replace with* *Electric*  [ ]  *Replace with Natural Gas*  |
| Is the primary heating system functioning? [ ]  Yes [ ]  No | If a heat pump, is the heat pump technology working? [ ]  Yes [ ]  No |
| Primary Heating System Thermostat Type: [ ]  Non-programmable [ ]  Programmable [ ]  Smart Thermostat (Nest or Eco-bee) |
| Does the home have Wi-Fi? [ ]  Yes  [ ]  No |
| Is there secondary non-electric heating? (Wood stove, Propane, etc) [ ]  Yes (please describe):  |
| 1. **Water Heating**
 |
| Fuel Type:[ ]  Electric [ ]  Gas | Location of water heater (garage, utility room, basement, etc):  |
| 1. **Cooling**
 |
| Central AC: [ ]  Yes [ ]  No | Amount of Room AC Units (Window and/or Portable):  |
| 1. **Attic/Ceiling Insulation**
 |
| Approximate R-value: \_\_\_\_ | Attic Type: [ ]  Flat [ ]  Vault | [ ]  Vermiculite Insulation present  | [ ]  Knob & Tube Wiring present |
| 1. **Floor Insulation (optional, if easily accessible)**
 |
| Approximate R-value: \_\_\_\_\_ | [ ]  Standing water present | [ ]  Exposed Soil/No Ground Cover | [ ]  Disconnected/Damaged Ducts |
| 1. **Windows**
 |
| Window Type (majority): [ ]  Single-pane [ ]  Double-pane or more | Frame Type: [ ]  Wood [ ]  Aluminum [ ]  Vinyl |
| **Other Health and Safety Concerns:** Please check any/all of the following: |
| [ ]  Need for Functioning Smoke Detectors (1 per floor) [ ]  Non-functioning Bathroom/Kitchen Exhaust Fan(s) [ ]  Mold/Mildew  |
| [ ]  Need for Functioning CO Monitor, if Combustible Appliances Present (1 per floor)  |

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| **Energy Upgrade Considerations:** | **Is the home eligible? (Yes/No)** | **Is the resident interested? (Yes/No/Unknown)** |
| 1. **Ductless Heat Pump:** Suggest if the home has electric resistance zonal heat like baseboard or wall cadet heaters that serve the primary living space
 |  |  |
| 1. **Ducted Heat Pump:** Suggest if the home has an electric resistance forced air furnace
 |  |  |
| 1. **90+% AFUE Gas Furnace:** Suggest if the home has an existing, older gas furnace, especially if it is inefficient
 |  |  |
| 1. **Smart Thermostat:** Suggest if the home has Wi-Fi, a forced air furnace (gas or electric resistance), and a non-programmable thermostat
 |  |  |
| 1. **Heat Pump Water Heater:** Suggest if the home has an older water heater, especially if located in unconditioned space like a garage
 |  |  |
| 1. **Attic Insulation:** Suggest if the home has less than R-18 (typically 6 inches of insulation or less)
 |  |  |
| 1. **Floor Insulation:** Suggest if the home has less than 3-4 inches of floor insulation (R-11 or less)
 |  |  |
| 1. **Windows:** Suggest any broken/non-functioning single-pane windows to be replaced with double-pane or greater
 |  |  |
| 1. ***Referral to Community Action Agency (CAA):*** *Income-qualified residents may be eligible for free HVAC/weatherization services through their local CAA*
 | *Referred? [ ]  Yes [ ]  No* |

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| **Additional Notes** |
| 1. Are there any energy upgrades you will assist the resident to pursue? Which ones?
 |
| 1. If the resident was eligible for any measures, but not interested, please describe why:
 |
| 1. Other Notes (ex. expand on health and safety concerns, further describe secondary heating sources, etc):
 |

**Terms and Conditions**

**authorization:** This authorization form must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this authorization and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. The organization submitting this form must be a Participating Organization in good standing in Energy Trust’s Community Partner Funding program prior to Energy Trust processing or paying any funding**.** Funding is subject to availability and may change. **Please allow 4‑6 weeks for funding processing.**

**ELIGIBILITY:** Funding is available to detached single-family homes, manufactured homes, and eligible multifamily customers who are (i) Oregon residential electric service customers of Portland General Electric or Pacific Power and (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, and (iii) Washington residential natural gas service customers of NW Natural. Funding for energy-saving measures that help save on the cost of home heating are available to PGE and Pacific Power customers who heat their homes with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat their homes with natural gas. Funding for energy-saving measures that help save on the cost of water heating are available to PGE and Pacific Power customers who heat their water with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat their water with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

**CUSTOMER:** The person signing this form is signing on behalf of the Customer. By signing this form, Customer certifies that they are eligible for Energy Trust services and funding.

**PROPERTY RIGHTS:** Customer represents that Customer has the right to authorize the installation of the energy-saving measures on the property on which those measures are completed and/or installed and that any necessary landlord's consent will be obtained.

**Access and Evaluation:** Energy Trust and/or its representatives may request access to the property and may review and evaluate the property during and after completion. Customer agrees to provide reasonable access to the property for the purposes described herein.

**Information Release:** Customer agrees that Energy Trust may include Customer’s name, Energy Trust services and resulting energy-savings in reports or other documentation submitted to Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, the Oregon Legislature, and/or other government agencies. Customer authorizes Energy Trust or the Participating Organization to share Customer’s contact information with Contractors for the purpose of coordinating estimates for installing energy upgrades. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.

**CUSTOMER Notification**: Participating Organization will inform Customers that this service is provided as a part of
Energy Trust's Home Retrofit or Existing Multifamily Programs and will provide Customers with information about Energy Trust and its programs. Participating Organization will also provide customers with its contact information, including phone number and address, to allow Customer to report any concerns or ask any questions about services under the Program.

**Work quality VERIFICATION:** Prior to any funding payment, Participating Organization will verify that the installed energy-saving measures meet program requirements and Energy Trust weatherization specification standards. Outdoor temperatures may affect this verification process.

**Payment:** Funding for eligible measures will be paid directly to the Participating Organization or Contractor after: (i) completion and or installation of the energy-saving measures, (ii) verification of the completion and/or installation of the measures, and (iii) timely submission of all required documentation.

**FUNDING AMOUNT:** Funding amount cannot exceed total installed cost. Funding for energy-saving measures completed and/or installed through Energy Trust programs are limited to the amounts provided by Energy Trust. These amounts are subject to change. Current funding amounts are available on the web at [www.energytrust.org](http://www.energytrust.org). Contact Energy Trust with any questions.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability, which may be imposed on the Customer as a result of payment of any funding or as a result of obtaining financing. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

**NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor, or product. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

**Energy Information Release:** Customer authorizes Energy Trust and the Participating Organization/contractor signing this application to access utility energy usage data, including without limitation interval data, relating to the property on which energy-saving measures have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the Participating Organization/contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the Participating Organization/contractor signing this application to share information about the Customer’s thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

**DISCLAIMER / NO LIABILITY:** Customer understands that, although Energy Trust may provide funding to Participating Organization or Contractor to support energy-saving measures for the Customer, Energy Trust is not supervising work performed for Customer, nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products purchased. Energy Trust is simply providing funding to assist Customer in implementing energy-saving measures. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-savings results by its approval of the application or by any other of its actions.

**Optional Customer Demographic Information (If completed, choose all that apply)**

**Why is Energy Trust asking for this information?**

Energy Trust is asking customers to submit demographic information because it is our responsibility to ensure that all customers can directly benefit from our services. We believe demographic data collection is a simple yet powerful tool for pursuing equity and inclusion in our work and programs. Receiving the information below about our customers will give us a clearer picture of program participation rates within our Residential Programs. We will use that information to assess our offers and identify barriers to participation, enabling us to develop and improve offers to reduce or eliminate those barriers. Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives

Providing this information is optional, does not impact your participation in the program, and will be held confidential by Energy Trust.

Do you (or someone in your household) rent or own your home?

[ ]  Own

[ ]  Rent

[ ]  Live there but don’t pay rent

[ ]  Prefer to self-describe

[ ]  Prefer not to answer

Which of the following racial and ethnic backgrounds best describe you?

*(choose all that apply)*

[ ]  Asian or Asian American

[ ]  Black or African American

[ ]  Hispanic or Latino/a/x

[ ]  Middle Eastern or North African

[ ]  Native American or
Alaskan Indian

[ ]  Native Hawaiian or other
Pacific Islander

[ ]  White

[ ]  Some other race:

[ ]  Prefer not to answer

What best describes your gender?

[ ]  Female

[ ]  Male

[ ]  Non-binary/third gender

[ ]  Prefer to self-describe

[ ]  Prefer not to answer

Which of the following ranges describes your total household income for the previous year before taxes?\*

[ ]  Less than $25,000

[ ]  $25,000 - $34,999

[ ]  $35,000 - $49,999

[ ]  $50,000 - $74,999

[ ]  $75,000 - $99,999

[ ]  $100,000 - $149,999

[ ]  $150,000 - $199,999

[ ]  $200,000 or more

[ ]  Don’t know

[ ]  Prefer not to answer

What is the primary language(s) used in your household? (select all that apply)

[ ]  Chinese

[ ]  English

[ ]  French

[ ]  German

[ ]  Hindi

[ ]  Japanese

[ ]  Korean

[ ]  Russian

[ ]  Spanish

[ ]  Tagalog

[ ]  Vietnamese

[ ]  Another language

[ ]  Prefer not to answer

How long have you lived in your current home?

[ ]  Less than a year

[ ]  1-2 years

[ ]  3-5 years

[ ]  6-10 years

[ ]  More than 10 years

[ ]  Don’t know

[ ]  Prefer not to answer

How many full-time residents live in your home?\*

[ ]  1

[ ]  2

[ ]  3

[ ]  4

[ ]  5

[ ]  6

[ ]  7

[ ]  8

[ ]  8+

\* Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives