

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Customer Authorization | Form 300CPF



To be completed by Customer and Participating Organization

By signing this authorization, Customer, Participating Organization, and Home Assessor (as applicable) understand and agree to the following:

- A Home Energy Assessment (HEA) will be completed at the site located at the address specified below by the Participating Organization (named in the signature box below) or a third-party home assessor ("Home Assessor"). The results of the HEA will be documented below and will identify potential home energy upgrades at the site that may be eligible for Energy Trust incentives, if any.
- Customer agrees that Energy Trust and/or Participating Organization may share Customer's contact information with contractors for the express purpose of coordinating estimates for installing home energy upgrades as approved by Customer.
- With consent from Customer and/or homeowner, Participating Organization and/or the contractor selected to install the home energy upgrades ("Contractor") are responsible for qualifying and installing the authorized home energy upgrades at the site address below and managing requesting funding payments from Energy Trust.
- To be eligible for Energy Trust Community Partner funding for the HEA, the HEA must be completed in alignment with Energy Trust requirements, this authorization must be signed and initialed by Customer and Participating Organization or Home Assessor (if applicable), as named below, at the address specified below, and be returned with other applicable supporting documentation to verify the HEA has been completed.
- To be eligible for Energy Trust Community Partner funding for any subsequent home energy upgrades, Customer, Participating Organization, and/or Contractor must complete, sign and submit all required program forms (including **Form 320CPF – Incentive Request**) and all program requirements must be met. Energy Trust will issue funding check(s) for energy upgrade funding payments directly to the Participating Organization or Contractor that completed the work. Accordingly, Customer directs Energy Trust to provide any funding to which they might otherwise qualify to Participating Organization or Contractor and waives all rights to directly receive such Energy Trust funding for the eligible home energy upgrade(s).
 - To receive funding for energy upgrades, all work must comply with the [Residential Specifications Manual](#), meet requirements as laid out in the [program incentive guides](#) found on Energy Trust's website, and/or ODOE Community Heat Pump Deployment Program requirements, as applicable.
- Notwithstanding anything to the contrary, Energy Trust may deny funding for any HEAs or home energy upgrades that do not meet Energy Trust requirements or for any other reason, in its sole discretion.

Rental Property Owners: *If Customer is the rental property owner of the site, 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.*

Residential

1819 SW 5th Ave #331 ♦ Portland, OR 97201
Phone 1.866.311.1822 ♦ Fax 1.866.516.7592
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Residence Type (Please select the residence type)

- ☐ Detached, Single-Family Home ☐ Manufactured Home ☐ Accessory Dwelling Unit
☐ 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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Signature Section A: Customer must sign below prior to the HEA being conducted, and sign on page 6 after completion of the HEA.

Customer Name and Signature

By signing below, Customer agrees to all the terms and conditions on this form. Customer authorizes Participating Organization/Home Assessor to submit this authorization and all required invoices and documentation to Energy Trust on Customer's behalf.



Customer signature

Full name (please print and use same name as on invoice)

Date

Site Address

City

State

Zip

Customer email address

Customer phone

Signature Section B: Participating Organization must sign this form after completion of the HEA.

Participating Organization Name and Signature

By signing below, Participating Organization (i) understands and agrees to the terms and conditions on this form, (ii) certifies that this authorization and accompanying documentation are complete and accurate, and (iii) certifies that the Home Energy Assessment (HEA) associated with this funding request was completed as of the signature date below and in compliance with Energy Trust requirements. If Participating Organization is requesting funding for the HEA, Energy Trust will issue payment to the entity listed below at the address listed below if all requirements are met. The Participating Organization must be enrolled (i.e., have a signed and active **Form 371CPF** on file) and in good standing in Energy Trust's Community Partner Funding program prior to Energy Trust processing or paying any funding.



Participating Organization signature

Full name (please print)

Date

Participating Organization

Home Energy Assessment Date

Signature Section C: If a third-party Home Assessor is requesting funding for this home energy assessment (HEA), please sign below.

Home Assessor Name and Signature

By signing below, Home Assessor certifies that (i) they agree to the terms and conditions on this form, (ii) they have completed the HEA for which they are requesting funding by the signature date below and in compliance with Energy Trust requirements, and (iii) this authorization, accompanying invoice(s) and assessment documentation are complete and accurate. If all requirements are met, Energy Trust will issue payment to the entity listed below at the address listed below.



Home Assessor signature

Full name (please print)

Date

Company

OCCB# or Washington License # (Non-trade ally only)

Assessment date

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To be completed by Customer and Participating Organization

If a Home Energy Assessment (HEA) is performed, Participating Organization or Home Assessor must complete the information below:

Participating Organization Name:						
Home Assessor Name:					Date:	
Customer Information						
Customer Name:						
Customer Type: <input type="checkbox"/> Homeowner <input type="checkbox"/> Renter <input type="checkbox"/> Rental Property Owner/Manager						
Site Information						
a. Electric Provider: <input type="checkbox"/> Pacific Power <input type="checkbox"/> PGE <input type="checkbox"/> Other:						
b. Gas Provider: <input type="checkbox"/> NW Natural <input type="checkbox"/> Avista <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Other:						
c. Year Built:			d. Sq. Ft.:		e. # Stories:	
f. Foundation/Basement: <input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Crawlspace <input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement <input type="checkbox"/> Slab on grade						
Home Energy Systems Information						
1. Heating Systems (please check off all heating systems in the home)						
Fuel	Heating System	Current Use:		Condition		
		Primary	Supplemental	Functional	Poor function	Non-functional
a. Electric	I.Ducted Heat Pump					
	II.Ductless Heat Pump					
	III.Forced Air Furnace					
	IV.Zonal (Baseboard, Cadet, etc)					
	V.Other:					
b. Gas	I.Forced Air Furnace					
	II.Boiler					
	III.Other:					
c. Other	I.Oil Furnace					
	II.Woodstove					
	III.Propane or Kerosene Furnace					
	IV. Propane or Kerosene Stove					
	IV.Other:					
d. If poor function or non-functional, has it been assessed by an HVAC technician? <input type="checkbox"/> Yes <input type="checkbox"/> No						
e. If 'Other' Primary Heat, is a replacement recommended? <input type="checkbox"/> Replace with Electric <input type="checkbox"/> Replace with Natural Gas						
f. Primary Heating System Thermostat Type: <input type="checkbox"/> Non-programmable <input type="checkbox"/> Programmable <input type="checkbox"/> Smart Thermostat (Nest or Eco-bee)						
g. Does the home have Wi-Fi? <input type="checkbox"/> Yes <input type="checkbox"/> No						

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2. Water Heating			
a. Fuel Type: <input type="checkbox"/> Electric <input type="checkbox"/> Gas		Location of water heater (garage, utility room, basement, etc):	
3. Cooling			
a. Central AC: <input type="checkbox"/> Yes <input type="checkbox"/> No		Amount of Room AC Units (Window and/or Portable):	
4. Attic/Ceiling Insulation			
a. Approximate R-value: <input type="checkbox"/> R-0 – R11 <input type="checkbox"/> R-12 – R18 <input type="checkbox"/> R-19 – R30 <input type="checkbox"/> R-31 or more <input type="checkbox"/> Not Accessible		b. Attic Type: <input type="checkbox"/> Flat <input type="checkbox"/> Vault	c. Is Vermiculite Insulation present? <input type="checkbox"/> Yes <input type="checkbox"/> No
d. Is Knob & Tube Wiring present? <input type="checkbox"/> Yes <input type="checkbox"/> No			
5. Floor Insulation (optional, if easily accessible)			
a. Approximate R-value: <input type="checkbox"/> R-0 – R11 <input type="checkbox"/> R-12 – R30 <input type="checkbox"/> R-31 or more <input type="checkbox"/> Not Accessible		b. Is standing water present? <input type="checkbox"/> Yes <input type="checkbox"/> No	c. Exposed Soil/No Ground Cover <input type="checkbox"/> Yes <input type="checkbox"/> No
d. Disconnected or Damaged Ducts? <input type="checkbox"/> Yes <input type="checkbox"/> No			
6. Windows			
a. Window Type (majority): <input type="checkbox"/> Single-pane <input type="checkbox"/> Double-pane or more		b. Frame Type: <input type="checkbox"/> Wood <input type="checkbox"/> Aluminum <input type="checkbox"/> Vinyl	
7. Other Health and Safety Concerns: Please check any/all of the following:			
<input type="checkbox"/> a. Need for Functioning Smoke Detectors (1 per floor) <input type="checkbox"/> b. Non-functioning Bathroom/Kitchen Exhaust Fan(s)			
<input type="checkbox"/> c. Mold/Mildew/Moisture Issues <input type="checkbox"/> d. Need for Functioning CO Monitor, if Combustible Appliances Present (1 per floor)			
8. Roof (optional): Please Check any/all of the following			
a. What is the roof material? <input type="checkbox"/> Corrugated Metal <input type="checkbox"/> Asphalt Shingle <input type="checkbox"/> Standing Seam Metal <input type="checkbox"/> Metal Tile <input type="checkbox"/> Terracotta Tile <input type="checkbox"/> Other		b. Roof Condition: <input type="checkbox"/> Good <input type="checkbox"/> Average <input type="checkbox"/> Poor	c. Are there visible signs of roof deterioration (such as damaged shingles, rust, etc.) <input type="checkbox"/> Yes <input type="checkbox"/> No
d. When was the roof last replaced? <input type="checkbox"/> More than 10 years ago <input type="checkbox"/> less than 10 years ago <input type="checkbox"/> Unknown		e. Is the roof suitable for solar panels? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Size sqft:			
Optional Deferred Maintenance: Please check any/all of the following: do any of these issues prevent installation?			
Lead: Does presence of lead prevent any measure installation? <input type="checkbox"/> Yes <input type="checkbox"/> No		Pests: Do pests or pest damage prevent any measure installation? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Asbestos: Does the presence of asbestos prevent any measure installation? <input type="checkbox"/> Yes <input type="checkbox"/> No	Is there a need for electrical panel replacement: <input type="checkbox"/> Yes <input type="checkbox"/> No	Is there any structural damage that can prevent a measure installation? <input type="checkbox"/> Yes <input type="checkbox"/> No	

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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		
2. Ducted Heat Pump: Suggest if the home has an electric resistance forced air furnace		
3. 90+% AFUE Gas Furnace: Suggest if the home has an existing, older gas furnace, especially if it is inefficient		
4. Smart Thermostat: Suggest if the home has Wi-Fi, a forced air furnace (gas or electric resistance), and a non-programmable thermostat		
5. Heat Pump Water Heater: Suggest if the home has an older water heater, especially if located in unconditioned space like a garage		
6. Attic Insulation: Suggest if the home has less than R-18 (typically 6 inches of insulation or less)		
7. Floor Insulation: Suggest if the home has less than R-11 (typically 3-4 inches of insulation)		
8. Windows: Suggest any broken/non-functioning single-pane windows to be replaced with double-pane or greater		
9. Referral to Community Action Agency (CAA): Income-qualified residents may be eligible for free HVAC/weatherization services through their local CAA	Referred? <input type="checkbox"/> Yes <input type="checkbox"/> No	
10. Referral to CBO: Suggest if another organization will be assisting with upgrades	Referred? <input type="checkbox"/> Yes <input type="checkbox"/> No	
11. No-Cost: Is this site eligible for a co-cost ductless heat pump, ducted heat pump, heat pump water heater? The household must be at or below the lower threshold in the income chart on page 7. Bill Discount Program: If site is a candidate for a no-cost measure, is the household enrolled in Bill Discount Program through their utility provider? <i>If not enrolled in Bills Discount Program, is there interest in enrolling?</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No	

Referral Section: Please indicate if referring from one organization to another for upgrade completion.

HEA completing organization:

Site referred to:

Signature Section D: Customer must sign below after completion of the HEA.

Customer Name and Signature

By signing below, Customer acknowledges that the HEA was completed at the site and that the Participating Organization or Home Assessor that performed the HEA explained the results or provided a copy of the results.



Customer signature

Date

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Optional Customer Demographic Information

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.

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 Native
☐ Native Hawaiian or other Pacific Islander
☐ White
☐ Prefer to self-describe: _____
☐ Prefer not to answer

Income

Using the chart below, select one of the following options. My household income is:

- ☐ **Above the Middle Threshold income level** as indicated in the Income Chart below.
☐ **Between the Lower and Middle Threshold income levels** as indicated in the Income Chart below.
☐ **Below the Lower Threshold income level** for my household size as indicated in the Income Chart below. I understand that because of my income level, I am eligible to receive weatherization services and/or other energy upgrades from Oregon Housing and Community Services (OHCS) that may be available to me for free, but I still choose to participate in Community Partner Funding.

Income Chart		
Household Size	Lower Threshold	Middle Threshold
<input type="checkbox"/> 1 person	\$36,811	\$66,854
<input type="checkbox"/> 2	\$48,138	\$87,424
<input type="checkbox"/> 3	\$59,464	\$107,994
<input type="checkbox"/> 4	\$70,790	\$128,564
<input type="checkbox"/> 5	\$82,117	\$149,134
<input type="checkbox"/> 6	\$93,443	\$169,704
<input type="checkbox"/> 7	\$95,567	\$173,562
<input type="checkbox"/> 8 or more	\$97,690	\$177,418

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

- | | | |
|------------------------------------|--------------------------------------|---|
| <input type="checkbox"/> Arabic | <input type="checkbox"/> Korean | <input type="checkbox"/> Thai |
| <input type="checkbox"/> Cantonese | <input type="checkbox"/> Mandarin | <input type="checkbox"/> Ukrainian |
| <input type="checkbox"/> English | <input type="checkbox"/> Marshallese | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> French | <input type="checkbox"/> Russian | <input type="checkbox"/> Another language _____ |
| <input type="checkbox"/> German | <input type="checkbox"/> Spanish | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> Japanese | <input type="checkbox"/> Tagalog | |

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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 of Oregon, Inc. ("Energy Trust"). 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.

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 (PGE) 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 upgrades 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 upgrades 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.

PROPERTY RIGHTS: Customer represents that Customer has the right to authorize any work related to this form, including the Home Energy Assessment (HEA), at the site and that any necessary consent is obtained (e.g., landlords, tenants).

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 and 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 and/or the Participating Organization to share Customer's information and/or HEA results with another community-based organization, community action agency, or contractor for the purpose of coordinating estimates or other recommendations for installing energy upgrades. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.

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 for the HEA or home energy upgrades, Participating Organization will verify that the work meets program requirements and Energy Trust weatherization specification standards. Outdoor temperatures may affect this verification process.

PAYMENT: Subject to funding availability, funding for eligible HEAs will be paid directly to the Participating Organization or Home Assessor, as applicable, after (i) completion and verification of the HEA, and (ii) timely completion and submission of all required documentation. Subject to funding availability, funding for eligible upgrades will be paid directly to the Participating Organization or Contractor after: (i) completion and/or installation of the eligible upgrades, (ii) verification of the completion and/or installation of the upgrades, and (iii) timely submission of all required documentation, including **Form 320CPF**. Failure to deliver all required information may result in a delay or withholding of payment.

Please allow 4-6 weeks for funding processing.

FUNDING AMOUNT: Funding amount cannot exceed total cost of the upgrade and its installation. Funding for energy upgrades completed and/or installed through Energy Trust programs are limited to the amounts provided by Energy Trust. Funding is subject to availability and amounts may change. Current funding amounts can be found at www.energytrust.org. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability imposed 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 upgrades 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 support completion of an HEA or energy upgrades 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. Customer assumes the risk of any loss or damage(s) that customer may suffer in connection with the HEA, site visits, or the energy upgrades. Energy Trust's liability is limited to the amounts of any qualifying program incentive payment(s) and Energy Trust is not liable to Customer for any further amount or other damages.

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