Heating and cooling costs account for the majority of the average home’s utility bill, and water heating is typically the second greatest energy use. Your home may be a good fit for appliances using heat pump technology, which could reduce your utility bills..

Energy Trust of Oregon is a nonprofit organization that assists investor-owned utility customers with energy efficiency and renewable energy projects. Energy Trust **may be able to cover the entire cost, or significantly discount the cost of a new ductless heat pump, central heat pump, and/or heat pump water heater installation for your home**.

The following questions ask for your household income and your experience with your energy bill(s) to help Energy Trust determine if a heat pump appliance could reduce your utility bills and make your home more comfortable.

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| **Client Information** |
| Name:       | Date:       |
| Home Address:       |

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| **Income Verification** |
| "Income" includes any income or funds you receive or that is received by people you count as living in your household  |
| Household size (how many people?):       |
| Household’s gross annual income:        | *OR* Household’s gross monthly income:       |
| Have you participated in any of the following programs in the last 3 years? | [ ]  Oregon Supplemental Nutrition Assistance Program (SNAP)[ ]  Oregon Weatherization Assistance Program[ ]  Oregon Utility Bill Payment Assistance[ ]  Oregon Low-Income Household Water Assistance Program[ ]  Oregon Special Supplemental Nutrition Program for Women, Infants and Children (WIC)[ ]  Discount Bill Rate Program (through your electric utility)[ ]  Other:       |

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| **Energy Bill Payment Experience** |
| Do you ever struggle to pay your electricity bill?  | [ ]  Never [ ]  Sometimes [ ]  Often [ ]  Other:       |
| Do you struggle to pay for any other necessities? (food, medicine, water bills, etc.) | [ ]  Never [ ]  Sometimes [ ]  Often [ ]  Other:       |
| Approximately how much is your monthly electric bill payment in the **winter**?  |       |
| Approximately how much is your monthly electric bill payment in the **summer**?  |       |
| Do you have any other energy costs? [ ]  Yes [ ]  No | If yes, please list the estimated monthly costs of each below: |
| Wood |      $ / [ ]  per month OR [ ]  per year  | Propane |      $ / [ ]  per month OR [ ]  per year |
| Oil |      $ / [ ]  per month OR [ ]  per year | Kerosene |      $ / [ ]  per month OR [ ]  per year |
| Other:       |      $ / [ ]  per month OR [ ]  per year |

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| **Comfort Experience** |
| In the winter, do you ever turn down/off your heating system to purposefully make your bills more affordable?  | [ ]  Never/Rarely [ ]  Sometimes[ ]  Often | (If ‘Sometimes’ or ‘Often’), does this lead to uncomfortable indoor temperatures? | [ ]  Yes [ ]  No  |
| In the summer, do you ever turn down/off your air conditioning to purposefully make your bills more affordable? | [ ]  Never/Rarely [ ]  Sometimes [ ]  Often [ ]  We do not have AC | (If ‘Sometimes’ or ‘Often’), does this lead to uncomfortable indoor temperatures? | [ ]  Yes [ ]  No  |
| During periods of wildfire smoke, how do you cool your home? (Check all that apply) | [ ]  Room/Portable AC units[ ]  Fans [ ]  Open windows  |
| Have you or someone in your household experienced increased medical costs or medical visits due to **heat waves** in recent years? | [ ]  Yes [ ]  No |
| Have you or someone in your household experienced increased medical costs or medical visits due to **wildfires** in recent years? | [ ]  Yes [ ]  No |
| Does someone in your household have medical needs that require electricity? | [ ]  Yes [ ]  No |

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| ***Additional Notes*** |
|       |

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| ***To Be Completed by Organization Staff Member*** |
| *By signing this Agreement, I certify that the information presented is true and accurate to the best of my knowledge.* |
| Staff Member Name       | Signature | Date:       |
| Organization Name:       | Offer(s) Recommended: | [ ]  No-Cost DHP -or- [ ]  No-Cost HP [ ]  No-Cost HPWH  |

Submit questionnaire along with completed and signed [Form 300CPF: Customer Authorization form](https://www.energytrust.org/wp-content/uploads/2022/07/HES_FM0300CPF.pdf)
to communitypartners@energytrust.org