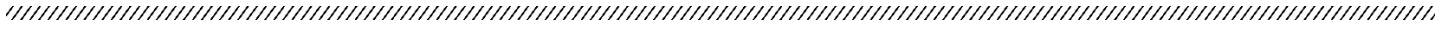


Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320CPF



To be completed by Customer and Participating Organization or Contractor



Steps to completion:

- 1** **Make** an energy saving improvement in a qualifying residence.
- 2** **Complete** application information, including:
 - Customer signature
 - Participating Organization or Contractor signatures
 - Invoices billing the customer for purchase and installation marked "Paid in full"
 - If this is an instant incentive project:
 - Invoice must show incentive deductions
- 3** **Submit** documentation via email to communitypartners@energytrust.org
- 4** **Receive** your check. Please allow four to six weeks for incentive processing after completed application and supporting documentation are received.

Need-to-know information:

- This form should be completed by the Customer and Participating Organization or Contractor.
- Energy Trust must receive applications within 60 days from the date of installation.
- All information must be completed for processing; incomplete information will result in delayed payment or disqualification.

Customer Information

This home is Owner occupied A rental property I own*
 *If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit www.energytrust.org/w9.

Site address _____ City _____ State _____ Zip _____

Primary phone Home Work Cell _____ Other Phone Home Work Cell _____

Utility Information

Electric utility: PGE Pacific Power Other _____

Gas utility: NW Natural Cascade Natural Gas Avista Other _____

Site Information

Year built	Square feet	Number of levels
Primary heating system (<i>check one</i>)	<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other _____
Water heating fuel	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas <input type="checkbox"/> Propane
Foundation/ basement	<input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement	<input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab on grade
Home type	<input type="checkbox"/> Single-family <input type="checkbox"/> Duplex	<input type="checkbox"/> Manufactured <input type="checkbox"/> Triplex
	<input type="checkbox"/> Rowhouse <input type="checkbox"/> Fourplex	<input type="checkbox"/> Townhouse

Energy Trust Incentive Recipient and Additional Funding Sources

Who is requesting Energy Trust incentives for home energy upgrades detailed in this form?
 Participating Organization Contractor (instant incentive amount listed on invoice)

Was there an additional funding source applied to this project?
 PCEF: ODOE: OHCS: Other: _____ No additional funding

Instructions for Signatures

Customer	The Customer is required to sign this form.
Participating Organization	<p>Has a Home Energy Assessment already been submitted to Energy Trust for this site? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>*If Participating Organization has completed and successfully submitted a Home Energy Assessment and 300CPF for this site to Energy Trust, the Participating Organization's signature may be omitted on this form. Contractor must write Participating Organization's name in the box marked 'Participating Organization Company'.</p>
Contractor	If the Participating Organization has signed this form, Contractor signatures are only required if Contractor is requesting the Energy Trust incentive.

Residential


Participating Organization: Community Partner Funding


Residential and Existing Multifamily | Project Details | Form 320CPF




To be completed by Customer and Participating Organization or Contractor

////////////////////////////////////
This **Form 320CPF** is used for completed home upgrades under the Community Partner Funding program. By signing below, Customer and Participating Organization have agreed that Energy Trust will issue the funding check for energy upgrades that meet Energy Trust requirements to the Participating Organization or Contractor named below. 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.

Customer Name and Signature		
<i>By signing below, Customer agrees to the terms and conditions in this application. Customer authorizes Participating Organization/Contractor to submit this application 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 on this application.</i>		
		
Customer signature	Full name (please print and use same name as on invoice)	Date

Participating Organization Name and Signature		
<i>By signing below, Participating Organization certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. To receive incentives, all work must comply with the Residential Specifications Manual and all other Energy Trust program requirements.</i>		
		
Participating Organization signature	Full name (please print)	Date
Participating Organization company		Install date

Contractor Name and Signature			
<i>By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. To receive incentives, all work must comply with the Residential Specifications Manual and all other Energy Trust program requirements.</i>			
			
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

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320CPF



To be completed by Customer and Participating Organization or Contractor

Heating & Cooling

Ductless Heat Pump <i>One incentive per residence. Residence must be located in Oregon and primarily heated by PGE or Pacific Power.</i>			
Upgrade type	Requirements	CPF Incentive amount	
<input type="checkbox"/> Ductless heat pump	Must have an HSPF2 ¹ of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRI.net.org) and replace electric resistance heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room). Must be single-indoor head, single compressor (1:1) inverter-driven system. No-cost option requires pre-approval from communitypartners@energytrust.org .	<input type="checkbox"/> \$1,850 small multifamily <input type="checkbox"/> \$2,900 displacing electric zonal <input type="checkbox"/> \$3,500 displacing electric furnace <input type="checkbox"/> No-Cost, income-qualified option	
In what type of room was the primary indoor unit installed? (e.g., living room, great room):			
What type of heating system did this replace? (Systems displacing natural gas or any other non-electric fuel will not qualify for incentive.)		<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric wall heat <input type="checkbox"/> Other:	
Is there an alternate, non-electric heating source being used to heat the room? If so, what is it?		<input type="checkbox"/> Electric radiant heat <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Oil heater <input type="checkbox"/> Propane heater <input type="checkbox"/> Gas stove <input type="checkbox"/> Wood stove <input type="checkbox"/> Pellet stove <input type="checkbox"/> Gas fireplace <input type="checkbox"/> No secondary heating system present <input type="checkbox"/> Other:	
Is an AHRI certificate attached to this application? <input type="checkbox"/> Yes <input type="checkbox"/> No — If no, provide heat pump outdoor unit information below.			Installed Cost \$:
Qty of outdoor units:	Qty of indoor units:	Total capacity (BTUs):	HSPF2:
Outdoor unit*:	Manufacturer:	Model:	Serial #:
Indoor unit*:	Model:		
* Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. The 'small multifamily' and 'No-Cost' incentive options allow up to two indoor units. If more than one indoor unit is installed, please provide information for the highest capacity unit.			

Residential

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320_{CPF}



To be completed by Customer and Participating Organization or Contractor

Ducted Heat Pump <i>Residence must be located in Oregon and primarily heated by PGE or Pacific Power.</i>		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Ducted Heat Pump	HSPF2 ¹ 7.50 or greater. Must be residence's primary heat source and replace electric forced air furnace . Thermostat lockout must be set to 35°F or lower if electric furnace auxiliary heat present. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. No-cost option requires pre-approval from communitypartners@energytrust.org .	<input type="checkbox"/> \$4,000 <input type="checkbox"/> No-cost, income-qualified option
<input type="checkbox"/> Extended capacity heat pump	Must be residence's primary heating source. Not required to replace electric heat. Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$2,000
<input type="checkbox"/> Extended capacity heat pump – replacing electric forced air furnace	Must replace electric forced air furnace as residence's primary heating source. Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$6,000
What type of heating system did this replace? <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Other:		
Is an AHRI certificate attached to this application? <input type="checkbox"/> Yes <input type="checkbox"/> If no, provide information below:		Installed Cost \$
HSPF2:	EER2:	SEER2:
Manufacturer:	Model:	Serial #:

¹ Applicable HSPF2, EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at energytrust.org/eestandards.

Residential

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320CPF



To be completed by Customer and Participating Organization or Contractor

Heat Pump Controls *Residence must be located in Oregon and primarily heated by PGE or Pacific Power.*

Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> New Heat Pump Controls	<i>(When replacing an existing heat pump with a new heat pump)</i> Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with ducted heat pump incentive or other controls incentives.	<input type="checkbox"/> \$250
<input type="checkbox"/> Existing Heat Pump Controls	Must be added to an existing heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with other controls incentives or ducted heat pump incentives.	<input type="checkbox"/> \$250
Thermostat	Lockout temperature: _____ ° F	Installed Cost \$
	Manufacturer _____	Model Name _____ Model # _____

Gas Furnace *Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.*

Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Gas Furnace	95% annual fuel utilization efficiency (AFUE) or greater. Gas furnaces used as backup for high efficiency heat pumps, also known as hybrid systems, are not eligible.	<input type="checkbox"/> \$1,600
ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No	AFUE: _____ %	Installed Cost: \$
Manufacturer: _____	Model: _____	Serial #: _____

Smart Thermostat *Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.*

Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Smart Thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump. Community Partner must indicate whether thermostat was connected to Wi-Fi. Visit http://www.energytrust.org/thermostat for eligible models. Cannot be combined with other controls incentives.	<input type="checkbox"/> \$250
Thermostat	Manufacturer: _____	Installed Cost \$
	Model Name: _____	Model #: _____

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320_{CPF}



To be completed by Customer and Participating Organization or Contractor

Water Heating

Heat Pump Water Heater <i>Residence must be located in Oregon and primarily heat water with electricity provided by PGE or Pacific Power.</i>			
Upgrade type	Requirements		CPF Incentive
<input type="checkbox"/> Heat Pump Water Heater	Eligible models must meet Northwest Energy Efficiency Alliance's (NEEA's) Advanced Water Heater Specification Tier 3 to qualify for this incentive. Tank may be any size. A midstream incentive may be available through retailers and distributors. No-cost option requires pre-approval from communitypartners@energytrust.org .		<input type="checkbox"/> \$240 <input type="checkbox"/> No-cost, income-qualified option
Water Heater	Manufacturer:	Model:	UEF:
	Serial number:	Installed cost:	
	Location installed:	<input type="checkbox"/> Garage <input type="checkbox"/> Crawlspace <input type="checkbox"/> Basement <input type="checkbox"/> Main home Other:	

Weatherization

Windows <i>Windows must be installed in a heated area of the home and replace single or double paned windows. Properties in Oregon must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Properties in Washington must be primarily heated by NW Natural.</i>					
Window type	Installed cost	U-Value	Total area installed	Total # of windows installed	CPF Incentive (per sq. ft)
<input type="checkbox"/> U-Value < 0.22	\$	U-	sq. ft.		Electric or Gas <input type="checkbox"/> \$1.50
<input type="checkbox"/> U-Value 0.23 – 0.27	\$	U-	sq. ft.		<input type="checkbox"/> \$1.00
<input type="checkbox"/> For enhanced CPF Windows Incentives, I have provided the Windows Addendum with Existing Condition form					
Supporting documentation must be attached to all window applications: <ul style="list-style-type: none"> • Proof of U-Value for each window • Proof of size for each window • Paid in full purchase and install invoicing 		<input type="checkbox"/> Accepted proof of U-Value:	Attach copies of the NFRC stickers for all windows installed OR the window manufacturer's packing slip with U-Values listed for all windows installed.		
		<input type="checkbox"/> Accepted proof of size:	Attach an itemized invoice showing window dimensions and U-Value from manufacturer, distributor, retailer or contractor for all windows installed OR a completed Windows Addendum with Existing Type form.		

Residential

Participating Organization: Community Partner Funding

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To be completed by Customer and Participating Organization or Contractor

Insulation in Manufactured Homes *Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*

Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Floor	R-11	R-22 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.45	<input type="checkbox"/> Up to \$1.76
Attic	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.13	<input type="checkbox"/> Up to \$1.74

Insulation in Single Family and Small Multifamily Homes *Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*

Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Wall (includes rim joist and knee wall)	R-4	R-11 or fill cavity	_____ sq.ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.32	<input type="checkbox"/> Up to \$3.30

- If applying for multiple wall insulation types, provide beginning R-value of wall insulation type with largest sq. ft installed.
- For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities

Floor	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.09	<input type="checkbox"/> Up to \$3.65
Attic (R0-R11)	R-11	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$3.00	
Attic (R-12 to R-18)	R-18	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$2.49	

Attic Insulation with Additional Costs	<p>If this attic insulation project included any of the following costs that caused the project to cost more than \$3.00/sq. ft, higher incentives may be available.</p> <p>Use the excel spreadsheet insulation calculator to identify the higher incentive option and submit the calculator in addition to this form</p> <p><i>Existing insulation must be R-18 or less. Must insulate to R-38 or greater or fill cavity.</i></p>	<input type="checkbox"/> Higher Incentive Option
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Residential

Participating Organization: Community Partner Funding

Residential and Existing Multifamily | Project Details | Form 320_{CPF}



To be completed by Customer and Participating Organization or Contractor

Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this application 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. 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. 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 action.