**Who can apply:**

Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at an existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers on eligible rate schedules of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. Additional requirements apply; see Terms and Conditions for details.

**Steps to completion:**

1. **Install** a qualifying energy efficiency improvement.
2. **Complete** application information and provide required supporting documentation, including:
   * W-9 for payee, if applicable
   * Invoice(s) for product and installation
   * Manufacturer spec sheet(s)
3. **Submit** form by fax, email or mail along with supporting documentation to:

**Energy Trust of Oregon**

**Existing Multifamily**

111 SW Columbia St., Suite 945

Portland, OR 97201

1.877.510.2130 phone

503.243.1154 fax

[multifamily@energytrust.org](mailto:multifamily@energytrust.org)

1. **Receive** your check.

Please allow six to eight weeks for incentive processing after completed application is received.

**What you need-to-know:**

* Energy Trust must receive applications within 90 days from equipment purchase and install.
* Incomplete information will result in delayed payment or disqualification of the incentive.
* A post-installation verification may be required to receive payment.
* Use ***Forms 320HVAC, 320APP,*** or ***320WX*** for other Existing Multifamily upgrades.

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| Energy Trust Use Only | Project ID | PT ID | Promo Code (Optional) |

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| **Incentive limits apply; see Terms and Conditions** |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Property Owner  *Check this box if you want the Property Owner named below to receive the incentive check* | | | | | | | | | | | | | | | |
| Legal Name of Property Owner | | | | | | | | |  | | | **(the “Participant”)** | | | |
| Contact Name | | | |  | | | | | | Title | | | |  | |
| Mailing Address | | | |  | | | | | | | | | | | |
| City |  | | | | | | State | |  | Zip | | | | |  |
| Phone | |  | | | Work  Cell | | Email | |  | | | | | | |
| Property Ownership | | | Investment Owner | | | Individual Unit Owner | | Occupied by | | | | | Owner  Tenant | | |
| Is this property used for rental income?  Yes  No | | | | | | | | | | | *If you checked* ***Yes****, a W-9 is required for payment.* | | | | |

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| Property Representative *(Skip section if you are an individual unit owner)* | | | | | | | | | |
| Company Name | | |  | | | | | | |
| Contact Name | | |  | | Title | | | | |
| Mailing Address | | |  | | | | | | |
| City |  | | | | State |  | | Zip |  |
| Phone | |  | | Work  Cell | Email | |  | | |

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| Property Information | | | | | | | | | | | | | |
| Property Name | | |  | | | | | | | | | | |
| Address | | |  | | | | | | | | | | |
| City | | |  | | | | | State | | | | Zip |  |
| Number of Buildings | | | | | Number of Units | | | | | Number of Bldg Levels | | | |
| Year Built | | | | Total Sq. Ft. of Buildings or Unit | | | | | | | | | |
| Market | | Affordable Housing  Market Rate | | | | | Campus Living  HOA | | | | Asst. Living/Retirement  Individual Unit Owner | | |
| Building Style | Low-Rise (1-3 stories)  Mid-Rise (4-8 stories)  High-Rise (9 or more stories) | | | | | | | Duplex  Triplex  Fourplex | | | | Townhouse/Rowhouse  Other | |
| Electric Utility | PGE  Pacific Power  Other | | | | | Gas  Utility | | | NW Natural  Cascade Natural Gas  Avista  None | | | | |

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| Water Heating*(check all that apply)* | |
| Electric *OR*  Gas | System type:  Central Boiler  Storage Tank  Tankless  Other |

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| **Space Heating** |
| Electric  *OR*  Gas |

**Water Heating Incentives**

„ **All property types**

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| --- | --- | --- | --- | --- | --- |
| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **kBtu/h** | **Incentive Requested** |
| **Commercial Condensing Tank Water Heater**  $3.50 per kBtu/h | * Gas-condensing, storage-type water heater with integral tank volume at least 10 gallons * Must have minimum 94% Thermal Efficiency (TE) or recovery efficiency * Water heater input capacity must be greater than 75 kBtu/h per water heater * Additional storage-only tanks may be present * Property must have a shared central domestic hot water system * Property must have water heating fuel provided by a participating gas utility * Projects where existing water heater is functional, and not at the end of its useful life, do not qualify | Efficiency Rating | $ |  | $ |
| Model: |
| Manufacturer: |
| Tank Size: |
| **Commercial Condensing Tankless Water Heater/ Boiler at least 200 kBtu/h input**  $1.40 per kBtu/h | * Gas-condensing domestic hot water (DHW) must serve a central water heating system and must not be used for space heating * Must have minimum 94% Thermal Efficiency (TE) * Water heater input capacity must be at least 200 kBtu/h per water heater * Integral tank volume  must be less than 10 gallons * Approved models must be found here: [www.ahridirectory.org](http://www.ahridirectory.org) * Property must have water heating fuel provided by a participating utility | Efficiency Rating | $ |  | $ |
| Model: |
| Manufacturer: |
| Tank Size: |

„ **Stacked structures with five or more units only**

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| --- | --- | --- | --- | --- | --- |
| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **Quantity Installed** | **Incentive Requested** |
| **Domestic Hot Water (DHW) Recirculation Pump Controls**  $180 per system 1/4 horsepower (hp) and below  $300 per system More than 1/4 hp  up to 1.25 hp  $600 per system More than 1.25 hp  up to 2.5 hp  $1,400 per system More than 2.5 hp  up to 5 hp | * Pump control types must be temperature, combined timer and temperature or learning controls * DHW recirculation system must meet applicable codes and regulations * Property must have domestic central water heating * Retrofitted controls or integral controls qualify * Property must have water heating fuel provided by a participating utility | Control Type:  Temperature  Learning  Combined  Timer and Temperature | $ |  | $ |

„ **Stacked structures with five or more units only**

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| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **Quantity Installed** | **Incentive Requested** |
| **Condensing Tankless Water Heater under 200 kBtu/h input – *Gas***  $140 per unit | * Gas-condensing domestic hot water (DHW) must not be used for space heating and must serve stacked structures with central water heating * Water heater Uniform Energy Factor (UEF) must be at least 0.94 * Water heater input capacity must be less than 200 kBtu/h per water heater * Additional hot water storage tanks cannot be added * Approved models must be found here: [www.ahridirectory.org](http://www.ahridirectory.org) | Efficiency Rating | $ |  | $ |
| Manufacturer: |
| Tank Size or kBtu/h |
| Model: |
| # of dwelling units served by new system |
| Did the previous water heating system use a storage tank?  Yes  No  If so, will the storage tank continue to be used?  Yes  No  N/A | | | |

„ **Side-by-side or duplex, triplex, fourplex properties only**

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| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **Quantity Installed** | **Incentive Requested** |
| **Residential Gas Tankless Water Heater – under 200 kBtu/hr input\***  $400 per unit | * Water heater must be ENERGY STAR® qualified at the time of purchase. Please visit [energytrust.org/tanklesswaterheaters](http://energytrust.org/tanklesswaterheaters) for a list of qualifying models * Water heater must replace storage tank water heater * Dwelling unit must have an existing dedicated ½” gas line capable of serving the tankless water heater OR an existing ¾” gas line that can serve the existing appliances, in addition to the tankless water heater * Hybrid water heaters do not qualify * Property must have water primarily heated by a participating utility. Properties without an existing gas line only qualify if a new gas line installed at no cost by a utility. | UEF | $ |  | $ |
| Manufacturer: |
| Model: |
| Was the unit’s gas line upgraded to accommodate the installation of the tankless water heater?  Yes  No  What was the size of the unit’s original gas line?  ½”  ¾”  Other  What is the unit replacing?  Gas Storage Tank  Electric Storage Tank  Other | | | |
| \* For Oregon single-family and manufactured homes, please apply using forms found at [energytrust.org/forms](http://www.energytrust.org/residential/forms/). | | | | | |

**Pool Incentives**

„ **All property types**

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| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **Pool  Sq. Ft.** | **Incentive Requested** |
| **Commercial Swimming Pool Heater**  **Non-Condensing Heater, Covered**  $0.90 per sq. ft. of pool surface area  **Non-Condensing Heater, Not covered**  $1.00 per sq. ft. of pool surface area  **Condensing Heater, Covered**  $3.00 per sq. ft. of pool surface area  **Condensing Heater, Not covered**  $5.00 per sq. ft. of pool surface area | * Must have 400 kBtu/h capacity or less per heater, not to exceed a total of 1,000 kBtu/h for all heaters combined * Must be at least 94% thermal efficiency for condensing heaters, must be at least 84% efficiency for non-condensing heaters * Must be a replacement, gas-fired pool heater. Heater must not have a continuously burning pilot light * Property must receive gas from a participating utility * Covered and not covered pools both qualify. Qualifying pool covers include solid track, bubble type, or foam type with storage reels * Pool must meet minimum area requirements below: | Manufacturer: | $ |  | $ |
| Efficiency Rating: |
| Model: |
| kBtu/h: |
| Pool location:  Indoor  Outdoor |
| Pool cover:  Existing cover  Not covered |
| Number of heaters serving pool: |
| |  |  |  |  | | --- | --- | --- | --- | | Covered Pool | Heater Type | Pool Location | Minimum Required Pool Sq. Ft. | | No | Condensing | Indoor | 1,275 | | Outdoor | 700 | | Yes | Condensing | Indoor | 2,150 | | Outdoor | 1,050 | | No | Non-Condensing | Either | 500 | | Yes | Non-Condensing | Indoor | 850 | | Outdoor | 500 | | | | | | |

**Pool Incentives Continued**

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| **Equipment** | **Requirements** | **Equipment Installed** | **Installed Cost** | **Pool Sq. Ft.** | **Incentive Requested** |
| **Commercial Pool Cover**  $6.00 per sq. ft. of pool surface area | * Pool must be heated. Pool must not have had a pre-existing cover within six months of pool cover installation * Covers installed at residential pools do not qualify * Cover must be specifically designed for swimming pools, cover the entire pool surface area, and utilize a storage reel * Liquid evaporation suppressants, solar disks, and mesh covers do not qualify * Pool heating fuel must be provided by a participating utility | Manufacturer: | $ |  | $ |
| Model: |
| Pool location:  Indoor  Outdoor |
| Pool Heating Fuel:  Gas  Electric |
| Pool Heater Type:  Non-condensing Gas Heater  Condensing Gas Heater  Heat Pump Heater  Electric Resistance Heater |

**REMEMBER TO:**

u Complete and sign this application.

u Attach invoices and all other required project cost documentation for all equipment purchased.

u Attach a completed IRS Form W-9 or Energy Trust Substitute W-9 form if applicable.

u Use the ***Form 320A: Assign Payment*** to authorize payment of the incentive to your contractor or other designated Payee. To assign payment, both Participant and Payee must complete and sign a ***Form 320A*** and it must be submitted along with this incentive application.

|  |  |  |
| --- | --- | --- |
| Participant Signature *– if you are assigning your incentive, also complete Form 320A.* *Please sign below either manually (ex. handwritten) or electronically (ex. typing your name, drawing your signature on a touchpad or touchscreen, inserting a digital signature, or, if available, by clicking the box).* | | |
| **Signature**: By signing below, I represent that (i) I am authorized to enter into this agreement and have read, understand and agree to its **Terms and Conditions** on behalf of the named Participant, (ii) I have completed this application truthfully and accurately to the best of my knowledge, and (iii) the energy efficiency equipment installations have been completed to my satisfaction and all accompanying invoice(s) and other supporting documentation are accurate and complete. | | |
| Signature  Attention | Name (printed) | Date |
| **FOR MORE INFORMATION:** Call 1.877.510.2130, and ask for the Multifamily program. | | |

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| Terms and Conditions |

1. **Application.** Energy Trust must receive this application with all required accompanying documentation within 90 days of equipment purchase and installation in order to qualify for incentives. Certain limited time offers may require submittal by specific deadlines to qualify for bonus incentives. All required information must be submitted before this application will be processed. By submitting this application, Participant represents that (i) none of the equipment requesting incentives has already received an Energy Trust incentive or rebate at the time of purchase, and (ii) none of the equipment requesting incentives will be submitted to the Oregon Department of Energy for self-direct credits. Please retain a copy of this application and any accompanying documentation submitted. Energy Trust’s Program Management Contractor (PMC) provides Existing Multifamily program (Program) services on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application, or any lost or misdirected mail.
2. **Eligibility.** Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at an existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers on eligible rate schedules of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. If Participant may apply for Multifamily Energy Program funding from Oregon Housing and Community Services (OHCS) for any equipment listed, Participant must contact the Program to discuss eligibility before submitting this application. If eligible for OHCS Multifamily Energy Program funding, then Participant agrees Energy Trust can share information about Participant’s incentive application with OHCS for the purpose of determining potential incentive eligibility and funding amounts. Additional eligibility restrictions may apply. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust.
3. **Eligible Equipment.** Equipment must be new and must meet Energy Trust energy efficiency specifications to qualify. The specifications and incentive amounts listed in this application, including any bonus amounts, are subject to change. Visit [energytrust.org/multifamilyincentives](https://www.energytrust.org/multifamily/existing-buildings/incentive/equipment/oregon/) to confirm current Program specifications and incentives. If you, or your contractor are not sure of the specifications, please call us before proceeding.
4. **Equipment Installation.** Participant represents that (i) it has the right to install the energy saving equipment on the property and site(s) on which the equipment is installed and that any necessary consents have been obtained, and (ii) that all equipment installed and work performed complies with all applicable laws, regulations, and safety, building, environmental, and permitting codes, and any manufacturer instructions.
5. **Project Cost Documentation.** Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased. The project cost documentation submitted must show (i) the date of purchase and itemized price paid, (ii) size, type, make, and model or part number of equipment purchased, and (iii) a description of any installation or other labor charges. In addition to the required proof of purchase documentation, the Program may require additional site or technical information from Participant, for certain equipment, in order to determine whether it qualifies for incentives. Participant will provide Energy Trust with additional proof of purchase or other requested equipment information upon request. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the energy-efficiency equipment (for example, state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration) then Participant is required to notify Energy Trust in writing when submitting the project documentation and Energy Trust’s incentive will not exceed an amount equal to the total eligible project cost minus such external funds.
6. **Payment.** Subject to funding availability, incentives will be paid following (i) installation of qualifying energy efficient equipment at the site address(es) listed, in accordance with Program requirements, (ii) Energy Trust’s receipt of this completed application, a complete, accurate, and verifiable ***IRS Form W‑9 (Request for Taxpayer Identification Number and Certification)*** for the incentive check recipient and all required accompanying project cost documentation, and (iii) satisfactory completion of a post-installation verification, if required. Incentives will be paid directly to the named Participant (at the mailing address shown above) unless Participant and its designated Payee sign and submit the ***Form 320A: Assign Payment*** along with this incentive application. Please allow 60 days from Energy Trust’s receipt of all information for delivery of incentive payment. Failure to deliver all required documentation may result in a delay or withholding of payment.
7. **Incentives.** Funds for incentives are limited and subject to budget availability. Program requirements, including incentive levels and limits, are subject to change without advance notice and may vary by utility service area depending on the pace of demand in each service area and the available incentive budget.The total incentive provided will depend upon the incentives in effect as of equipment purchase date. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentives will never exceed the total documented eligible measure cost. Energy Trust incentives will never exceed the documented total final eligible project costs or Energy Trust’s maximum allowable per-project incentive amount. The Program also limits the total amount of incentives that any Participant can receive on a per- site, per-year basis. Determination of site eligibility for application and incentive purposes shall rest solely with Energy Trust.
8. **Verification.** Equipment installations may be selected for a post-installation verification. Should Participant's property be chosen for a post-installation verification of the equipment, satisfactory completion of that verification has to occur before payment is issued. This verification is for the purpose of incentive payment only. No warranty is implied.
9. **Tax Liability.** Energy Trust is not responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. 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.
10. **No Endorsement.** Energy Trust does not endorse any particular manufacturer, contractor or product in promoting the Program. The fact that the names of particular manufacturers, contractors, products or systems may appear in the Program does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.
11. **Access and Evaluation.** Reviews and evaluations of project work during and after measure installation are a critical part of Energy Trust's evaluation process for energy savings and incentive calculations. Participant agrees to cooperate with any such evaluation as a requirement of its incentive agreement with Energy Trust. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s), obtaining any and all necessary consents, (ii) requested technical and other project documentation related to the installed equipment, and (iii) information about the energy use and operations of the equipment and/or project site(s) for the purposes of evaluating the energy savings during and after project completion. Participant agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided services to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.
12. **Disclaimer/No Liability.** **In connection with some applications, Energy Trust will provide incentive funding for energy-saving equipment. Participant understands that, while Energy Trust may provide this funding, neither Energy Trust nor the PMC are supervising any work performed for Participant, and neither Energy Trust nor the PMC are responsible in any way for proper completion of that work or proper performance of any equipment purchased. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with the equipment. Energy Trust does not guarantee any particular energy savings results by its approval of this application, or by any other of its actions.**
13. **Energy Information Release.** By signing and submitting this incentive application to Energy Trust, Participant authorizes Energy Trust to access its energy usage data, including without limitation interval data, for all of Participant’s electric and gas utility accounts at the physical address(es) of the project as listed. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information.  Participant further authorizes Energy Trust to discuss its energy efficiency efforts with its utility account representative(s).
14. **Information Release**. Participant agrees that Energy Trust may include some or all of the following information in reports to the legislature, Oregon Public Utility Commission (OPUC), funding utilities, and other government agencies as necessary to meet Energy Trust responsibilities and regulatory requirements: Participant’s name, site address, general description of the type of energy saving or renewable project implemented (e.g. lighting, HVAC, solar PV), Energy Trust services or incentive payments provided to the Participant, and any energy saved or generated as a result of Energy Trust services or incentives. Energy Trust will treat all other information gathered as confidential and report it to such agencies only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.
15. **Governing Law.** This agreement shall be exclusively governed by and construed in accordance with applicable Oregon law, without regard to any conflicts of laws rules thereof.