Water Heating Incentives
Existing Multifamily | Incentive Application | Form 320WH

To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon.

<table>
<thead>
<tr>
<th>Energy Trust Use Only</th>
<th>Project ID</th>
<th>PT ID</th>
<th>Promo Code (Optional)</th>
</tr>
</thead>
</table>

Incentive limits apply; see Terms and Conditions

**Property Owner**

- **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.*

**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**

**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
- [ ] Campus Living
- [ ] Asst. Living/Retirement
- [ ] Market Rate
- [ ] HOA
- [ ] 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

**Space Heating**

- [ ] Electric
- [ ] Gas

Water Heating *(check all that apply)*

- [ ] Electric
- [ ] Gas

System type:

- [ ] Central Boiler
- [ ] Storage Tank
- [ ] Tankless
- [ ] Other ____________

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Need Help Filling out this form? Call the Program at 1-877-510-2130
# Water Heating Incentives

**Existing Multifamily | Incentive Application | Form 320WH**

To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon.

## Water Heating Incentives

- **All property types**

<table>
<thead>
<tr>
<th>Equipment¹</th>
<th>Requirements</th>
<th>Equipment Installed</th>
<th>Installed Cost</th>
<th>kBtu/h</th>
<th>Incentive Requested</th>
</tr>
</thead>
</table>
| **Commercial Condensing Tank Water Heater** | - Gas-condensing, storage-type water heater with integral tank volume at least 10 gallons  
- Minimum 94% thermal efficiency (TE) or recovery efficiency  
- Input capacity greater than 75 kBtu/h  
- Additional storage-only tanks may be present  
- Properties must have a shared central domestic hot water system | Efficiency Rating | $                    |        | $                    |
| □ $3.00 per kBtu/h | Manufacturer:  
Tank Size: |                      |                      |        |                      |
| **BONUS INCENTIVE**:  
□ $0.50 per kBtu/h | | | | | |

*Limited Time Offer – Bonus Incentive:*
- Equipment must be purchased and installed between **September 1, 2023 – December 15, 2023**
- Applications must be received within 90 days of installation and no later than **December 15, 2023**

| Commercial Condensing Tankless Water Heater/ Boiler | Gas-condensing domestic hot water (DHW) must not be used for space heating and must serve a central water heating system  
- Minimum 94% thermal efficiency (TE)  
- Input of at least 200 kBtu/h per water heater  
- Integral tank volume less than 10 gallons  
- Approved models must be found here: www.ahridirectory.org | Efficiency Rating | $                    |        | $                    |
| □ $1.40 per kBtu/h | Manufacturer:  
Tank Size: |                      |                      |        |                      |

¹Property must have water heating fuel provided by a participating utility.
## Water Heating Incentives

**Existing Multifamily | Incentive Application | Form 320WH**

To be completed by Participant

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### All property types

<table>
<thead>
<tr>
<th>Equipment1</th>
<th>Requirements</th>
<th>Equipment Installed</th>
<th>Installed Cost</th>
<th>Quantity Installed</th>
<th>Incentive Requested</th>
</tr>
</thead>
</table>
| DHW Recirculation Pump Controls ≤ 1/4 hp | • Must be a standalone pump
• Pump control type must be temperature, combined timer and temperature or learning controls
• All installed controls must meet applicable codes and regulations
• Building must have central domestic water heating
• If adding retrofit controls, list controls manufacturer and model | Manufacturer:  
Model:  
Pump Size: hp
Control Type:  
☐ Temperature  
☐ Learning  
☐ Combined Timer and Temperature | $ | $ |
| DHW Recirculation Pump Controls > 1/4 hp | | | $ | $ |

1Property must have water heating fuel provided by a participating utility.
## Stacked structures with five or more units only

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Requirements</th>
<th>Efficiency Rating</th>
<th>Equipment Installed</th>
<th>Installed Cost</th>
<th>Quantity Requested</th>
</tr>
</thead>
</table>
| Condensing Tankless Water Heater – Gas | • ≥ 0.94 Uniform Energy Factor (UEF) Energy Factor (UEF)  
• < 200 kBTu/h input  
• Must supply hot water to multiple units  
• Additional hot water storage tanks may not be added  
Approved models must be found here: [www.ahridirectory.org](http://www.ahridirectory.org) | | Manufacturer: Tank Size or kBTu/h Model: # of dwelling units served by new system | $ | $ |

Did the previous water heating system use a storage tank?  
If so, will the storage tank continue to be used?  
Yes ☐  No ☐  N/A ☐

## Side-by-side or duplex, triplex, fourplex properties only

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Requirements</th>
<th>Efficiency Rating</th>
<th>Equipment Installed</th>
<th>Installed Cost</th>
<th>Quantity Requested</th>
</tr>
</thead>
</table>
| Residential Tankless Water Heater – Gas | • ≥ 0.82 UEF  
• Must replace storage tank water heater  
• Dwelling unit must have an existing dedicated ½” gas line capable of serving the water heater OR an existing ¾” gas line that can serve the existing appliances, in addition to the water heater  
• Hybrid water heaters do not qualify | | Manufacturer: Model: | $ | $ |

Was the unit’s gas line upgraded to accommodate the installation of the tankless water heater?  
Yes ☐  No ☐  N/A ☐
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 ☐

2 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.
### Pool Incentives

#### All property types

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Requirements</th>
<th>Equipment Installed</th>
<th>Installed Cost</th>
<th>Pool Sq. Ft.</th>
<th>Incentive Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Swimming Pool Heater</td>
<td>Maximum 400 kBtu/h capacity per heater, not to exceed a total of 1,000 kBtu/h for all heaters combined</td>
<td>Manufacturer: Efficiency Rating:</td>
<td>$</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>Non-Condensing Heater, Covered</td>
<td>Minimum 94% thermal efficiency for condensing heaters, minimum 84% efficiency for non-condensing heaters</td>
<td>Model: kBtu/h:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Condensing Heater, Not covered</td>
<td>Must be a replacement, gas-fired pool heater. Heater must not have a continuously burning pilot light</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condensing Heater, Covered</td>
<td>Property must receive gas from a participating utility</td>
<td>Pool location:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condensing Heater, Not covered</td>
<td>Covered and not covered pools both qualify. Eligible pool covers include solid track, bubble type, or foam type with storage reels</td>
<td>Pool cover:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pool must meet minimum area requirements below:</td>
<td>Number of heaters serving pool:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Covered Pool

<table>
<thead>
<tr>
<th>Covered Pool</th>
<th>Heater Type</th>
<th>Pool Location</th>
<th>Minimum Required Pool Sq. Ft.</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Condensing</td>
<td>Indoor</td>
<td>1,275</td>
</tr>
<tr>
<td>Yes</td>
<td>Condensing</td>
<td>Indoor</td>
<td>2,150</td>
</tr>
<tr>
<td>No</td>
<td>Non-Condensing</td>
<td>Indoor</td>
<td>1,050</td>
</tr>
<tr>
<td>Yes</td>
<td>Non-Condensing</td>
<td>Either</td>
<td>500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Indoor</td>
<td>850</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Outdoor</td>
<td>500</td>
</tr>
</tbody>
</table>
## Equipment Requirements

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| Commercial Pool Cover | - Pool must be heated. Pool must not have had a pre-existing cover within 6 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 are ineligible  
                        - Pool heating fuel must be provided by a participating utility |

### Equipment Installed

<table>
<thead>
<tr>
<th>Manufacturer:</th>
<th>Model:</th>
<th>Installed Cost</th>
<th>Pool Sq. Ft.</th>
<th>Incentive Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pool location:</th>
<th>Pool Heating Fuel:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gas</td>
</tr>
<tr>
<td>Indoor</td>
<td></td>
</tr>
<tr>
<td>Outdoor</td>
<td></td>
</tr>
</tbody>
</table>

**Pool Heater Type:**
- Non-condensing Gas Heater
- Condensing Gas Heater
- Heat Pump Heater
- Electric Resistance Heater

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**REMEMBER TO:**
- Complete and sign this application.
- Attach invoices and all other required project cost documentation for all equipment purchased.
- Attach a completed IRS Form W9 or Energy Trust Substitute W9 form if applicable.
- 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

By my signature below, I represent that (i) the Participant has read, understands and agrees to the Terms and Conditions of this agreement, (ii) I have the authority to sign this agreement on behalf of the Participant, and (iii) all accompanying project cost documentation is complete, true and accurate to the best of my knowledge.

<table>
<thead>
<tr>
<th>Authorized Representative Name (printed)</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
</table>

**FOR MORE INFORMATION:** Call 1.877.510.2130, and ask for the Multifamily program. Documents transmitted with faxed, scanned or digital signature shall be deemed to be original signatures. At the request of Energy Trust, Participant shall confirm signature by providing an original document.
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 submission by specific deadlines to qualify for bonus incentives. All required information must be submitted before this application will be processed. Participant represents that the information and documentation it submits in support of this application is complete, truthful and accurate. By submitting this application to Energy Trust, Participant further 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. Equipment that has received an Energy Trust incentive or rebate via another program offering is not eligible for any additional Energy Trust incentive funding. Participant should 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. 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. Participant further understands and agrees that if it is eligible for OHCS Multifamily Energy Program funding, then Energy Trust is authorized to share information about Participant’s incentive application with OHCS for the purpose of determining potential incentive eligibility and funding amounts. The Energy Trust incentive funding available to NW Natural Industrial Sales Service Customer accounts established under Rate Schedule 3, 31 or 32 and Commercial Sales Service Customer accounts established under Rate Schedule 32 is subject to NW Natural’s Schedule 360 filing with the Public Utility Commission of Oregon, and a signed Form 112N: Natural Gas Non-Transportation Agreement must be submitted in addition to this application to be eligible for Energy Trust natural gas incentives. Additional eligibility restrictions, including but not limited to any per-site, per-year limits, may apply and final determination of eligibility 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 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. Incentives will be paid following (i) installation of qualifying energy efficient equipment at the site address(es) listed, in accordance with Program requirements, (ii) submission 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 territory depending on the pace of demand in each territory and the available incentive budget. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust. 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 a maximum of $499,999. 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, the Oregon Public Utility Commission (OPUC), 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.

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.