

Multifamily Weatherization Incentives

Existing Multifamily | Incentive Application | Form 320_{wx}



To be completed by Participant

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

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:
 - o W-9 for payee, if applicable
 - o Invoice(s) for product and installation
 - o 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
- 4 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-verification installation may be required to receive payment.
- Use **Forms 320HVAC, 320WH, or 320APP** for other Existing Multifamily upgrades.

Energy Trust Use Only	Project ID	PT ID	Promo Code (Optional)
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Incentive limits apply; see Terms and Conditions

Property Owner Payee

Legal Name of Property Owner (the "Participant")

Contact Name	Title
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Mailing Address

City	State	Zip
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Phone	<input type="checkbox"/> Work <input type="checkbox"/> Cell	Email
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Property Ownership	<input type="checkbox"/> Investment Owner	<input type="checkbox"/> Individual Unit Owner	Occupied by	<input type="checkbox"/> Owner	<input type="checkbox"/> Tenant
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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
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Mailing Address

City	State	Zip
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Phone	<input type="checkbox"/> Work <input type="checkbox"/> Cell	Email
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Property Information

Property Name

Address

City	State	Zip
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Number of Buildings	Number of Units	Number of Bldg Levels
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Year Built	Total Sq. Ft. of Buildings or Unit
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Market	<input type="checkbox"/> Affordable Housing	<input type="checkbox"/> Campus Living	<input type="checkbox"/> Asst. Living/Retirement
	<input type="checkbox"/> Market Rate	<input type="checkbox"/> HOA	<input type="checkbox"/> Individual Unit Owner

Building Style	<input type="checkbox"/> Low-Rise (1-3 stories)	<input type="checkbox"/> Duplex	<input type="checkbox"/> Townhouse/Rowhouse
	<input type="checkbox"/> Mid-Rise (4-8 stories)	<input type="checkbox"/> Triplex	<input type="checkbox"/> Other _____
	<input type="checkbox"/> High-Rise (9 or more stories)	<input type="checkbox"/> Fourplex	

Electric Utility	<input type="checkbox"/> PGE	Gas Utility	<input type="checkbox"/> NW Natural
	<input type="checkbox"/> Pacific Power		<input type="checkbox"/> Cascade Natural Gas
	<input type="checkbox"/> Other _____		<input type="checkbox"/> Avista <input type="checkbox"/> None

Space Heating *(check all that apply)*

<input type="checkbox"/> Electric (select system type)	<input type="checkbox"/> Gas (select system type)
<input type="checkbox"/> Ducted Heat Pump	<input type="checkbox"/> Ductless Heat Pump
<input type="checkbox"/> Wall Heater	<input type="checkbox"/> PTHP <input type="checkbox"/> Furnace
<input type="checkbox"/> Baseboard	<input type="checkbox"/> Other _____
	<input type="checkbox"/> Central Boiler
	<input type="checkbox"/> Furnace
	<input type="checkbox"/> Other _____

Water Heating *(check all that apply)*

Electric -OR- Gas

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Insulation Incentives

Qualifying attic, floor and wall insulation projects must meet the following requirements:

- Space heating fuel must be provided by a participating utility.
- Insulation projects must be installed in accordance with the specifications outlined in the Energy Trust of Oregon Home Retrofit Specifications Manual: https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf.
- Self-installed projects require a post-installation verification, which may include an onsite visit and photos to verify the project.

► For side-by-side or duplex, triplex, fourplex properties only

Equipment	Requirements	Beginning R-Value	Ending R-Value	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Attic/Ceiling Insulation \$1.25 per installed square foot	<ul style="list-style-type: none"> • Electric or gas heat • Existing R-value must be R-18 or less • Installed R-value must be at least R-38 or fill cavity • Flat roof installations are ineligible 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$
<input type="checkbox"/> Floor Insulation \$0.50 per installed square foot	<ul style="list-style-type: none"> • Electric or gas heat • Existing R-value must be R-11 or less • Installed R-value must be at least R-30 or fill cavity 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$
<input type="checkbox"/> Wall Insulation (includes exterior, knee wall and rim joist) \$0.50 per installed square foot	<ul style="list-style-type: none"> • Electric or gas heat • Existing R-value must be R-4 or less <p>For Exterior Wall:</p> <ul style="list-style-type: none"> • Installed R-value must be at least R-11 or fill cavity • All heated exterior walls must be insulated <p>For Knee Wall:</p> <ul style="list-style-type: none"> • Installed R-value must be at least R-15 for 2x4 cavities, or at least R-21 for 2x6 cavities • Must have vapor-permeable air barrier <p>For Rim Joist:</p> <ul style="list-style-type: none"> • Installed R-value must be at least R-15 or fill cavity 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$

- For Oregon single-family and manufactured homes, please apply using forms found at energytrust.org/forms.

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Insulation Incentives (continued)

Qualifying attic, floor and wall insulation projects must meet the following requirements:

- Space heating fuel must be provided by a participating utility.
- Insulation projects must be installed in accordance with the specifications outlined in the Energy Trust of Oregon Home Retrofit Specifications Manual: https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf
- Self-installed projects require a post-installation verification, which may include an onsite visit and photos to verify the project.

► For stacked structures with 5 or more dwelling units only

Equipment	Requirements	Beginning R-Value	Ending R-Value	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Attic/Ceiling Insulation \$0.25 per installed square foot	<ul style="list-style-type: none"> • Electric or gas heat • Existing R-value must be R-11 or less • Installed R-value must be at least R-49 or fill cavity • Flat roof installations are ineligible 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$
<input type="checkbox"/> Floor Insulation \$1.90 per installed square foot	<ul style="list-style-type: none"> • Electric heat only • Existing R-value must be R-11 or less • Installed R-value must be at least R-30 or fill cavity 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$
<input type="checkbox"/> Wall Insulation \$0.50 per installed square foot	<ul style="list-style-type: none"> • Electric heat only • Existing R-value must be R-6 or less • Installed R-value must be at least R-11 or fill cavity 	R-	R-	\$	sq ft <input type="checkbox"/> Cavity filled	\$

Pipe Insulation Incentives

► For stacked structures with 5 or more dwelling units only

Equipment	Insulation Requirements	Installed Cost	Insulation Thickness	Pipe Specs	Incentive Requested
Boiler Pipe Insulation <input type="checkbox"/> \$10.00 per linear ft. Gas low-pressure steam (less than 15 psig)	<ul style="list-style-type: none"> • 1.5" diameter pipe or less requires 1.5" minimum insulation thickness • Pipe greater than 1.5" in diameter requires 2" minimum insulation thickness • Indoor pipe insulation projects must include All Service Jacketing (ASJ) and outdoor pipe insulation projects must include PVC or aluminum jacketing 	\$	Inches:	Length (linear ft):	\$
<input type="checkbox"/> \$10.00 per linear ft. Hot water used for space heating (Hot water pipe diameter must be at least 3".)				Diameter (inches):	
Domestic Hot Water Pipe Insulation <input type="checkbox"/> \$10.00 per linear ft. Central gas-fired recirculation systems only	<ul style="list-style-type: none"> • Batt insulation does not qualify for incentive • Must be fueled by gas provided by a participating utility. 	\$	Inches:	Length (linear ft):	\$
				Diameter (inches):	

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Window And Sliding Glass Door Incentives

Qualifying window and sliding glass door projects must meet the following requirements:

- Space heating fuel must be provided by a participating utility.
- Projects must be installed in accordance with the specifications outlined in the Energy Trust of Oregon Home Retrofit Specifications Manual: [https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual WEB.pdf](https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf).
- Proof of U-value and window size required. A manufacturer’s invoice showing the window size and U-value and/or an NFRC sticker that shows the U-factor is acceptable documentation. If not available, use the Windows Specification Supplement to document this information: energytrust.org/commercial/multifamily-forms/.

► **For side-by-side or duplex, triplex, fourplex properties only**

Replacement Window / Door	Requirements	U-Value	Installed Cost	Square Ft. of Windows	Quantity of Windows	Incentive Requested
<input type="checkbox"/> \$1.00 per square ft. U-Value: 0.23 to 0.27	<ul style="list-style-type: none"> • Electric or gas heat • Replace single or double-pane 	U-	\$			\$
<input type="checkbox"/> \$1.50 per square ft. U-Value: 0.22 or lower	<ul style="list-style-type: none"> • Electric or gas heat • Replace single or double-pane 	U-	\$			\$

► **For stacked structures with 5 or more units only**

Replacement Window / Door	Requirements	U-Value	Installed Cost	Square Ft. of Windows	Quantity of Windows	Incentive Requested
<input type="checkbox"/> \$8.00 per square ft. U-Value: 0.23 to 0.30 <input type="checkbox"/> \$12.00 per square ft. U-Value: 0.22 or lower <input type="checkbox"/> \$4.00 per square ft. Storm windows	<ul style="list-style-type: none"> • Electric or gas heat⁹ • Replace single-pane or double-pane or add storm window • To be eligible for storm windows incentive, glass must be low-e with emissivity 0.22 or lower and solar transmittance greater than 0.55. • Storm windows must be permanently installed and in the same opening type as existing prime windows. Exterior storm windows must be oriented with the low-e coating facing interior of site • Storm window frames must not make direct contact with metal-framed prime windows • Windows installed in residential units and heated common area spaces within the property that are accessible 24/7 	U-	\$			\$
Frame Type Replaced: <input type="checkbox"/> Wood <input type="checkbox"/> Aluminum <input type="checkbox"/> Aluminum & Storm Window Type Replaced: <input type="checkbox"/> Single-pane <input type="checkbox"/> Double-pane						

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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 W-9 or Energy Trust Substitute W-9 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**. 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.

Authorized Representative Signature

Name (printed)

Date



FOR MORE INFORMATION: Call 1.877.510.2130, and ask for the Multifamily program.

Terms and Conditions

- 1. Application.** Energy Trust must receive this application with all required accompanying documentation within 90 days of purchased equipment 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 to Energy Trust, 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.** If Participant may apply for Multifamily Energy Program funding from Oregon Housing and Community Services (OHCS) funding 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. 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 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, and 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.

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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) 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.

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.