Insulating your industrial process piping systems can help save energy. Energy Trust of Oregon is making a Trade Ally Direct Install Pipe Insulation Offering available to reduce your costs to purchase and install qualifying pipe insulation. **Depending on your project scope, Energy Trust’s cash incentives could help cover most or even all your potential pipe insulation project cost.** Only participating Direct Install Pipe Insulation Trade Ally contractors can offer these Energy Trust incentives.

Your Direct Install Pipe Insulation Trade Ally contractor will work with you through each step of the process, from confirming your eligibility to installing the insulation. The Direct Install Pipe Insulation Offering incentives will be paid directly to your Direct Install Pipe Insulation Trade Ally contractor, who will deduct the incentive amount from your invoice, reducing your out-of-pocket expense. You are required to pay the balance of your project invoice. Incentive amounts will not exceed eligible pipe insulation project costs.

Eligible pipe insulation projects must be (1) on an existing uninsulated piping system of specified pipe diameter(s) containing hot water, steam, condensate, or other process fluid between 160°F and 388°F used for industrial process (non-HVAC) loads heated by a natural gas-fired source, (2) heated year round (8,400 hours per year), and (3) at an Oregon industrial facility served by a NW Natural, Cascade Natural Gas, or Avista account on a qualifying rate schedule.

The steps described below will help you know what to expect throughout the process. Contact your Direct Install Pipe Insulation Trade Ally contractor or production@energytrust.org if you have questions about this offering and how to get started.

Here's how to Participate:

* **Step 1:** Fill out **Part 1: Participant and Site Information**. Read **Section 1C: Terms and Conditions**. Provide this form to your Direct Install Pipe Insulation Trade Ally contractor so they can confirm whether your site is eligible.
* **Step 2:** If your site is eligible, your Direct Install Pipe Insulation Trade Ally contractor will complete **Part 2A: Request for Project Pre-Authorization** to estimate energy savings and potential incentives for your project and will provide you a quote for the cost of your project. This information will then be submitted to Energy Trust for review.
* **Step 3:** Energy Trust will review the Pre-Authorization estimate and project quote. If your proposed project meets program requirements, an Energy Trust representative will complete **Part 2B: Project Pre-Authorization and Incentive Reservation Information and Section 2C: Submittal Deadline**. This section will show the incentive amount that Energy Trust would reserve for the pre-authorized project and the deadline for completing it if you choose to participate.
* **Step 4:** To participate and reserve incentives for the project, you must then sign **Section 2D: Participant Signature** and submit this **Participation and Incentive Agreement** to Energy Trust before the date indicated in **Section 2C: Submittal Deadline**. Your signed form must be received by Energy Trust before authorizing your Direct Install Pipe Insulation Trade Ally contractor to start any pipe insulation project work. Incentives will not be reserved, and the project will not qualify for any pre-authorized incentive amounts shown unless Energy Trust receives the signed form by the submittal deadline.
* **Step 5:** Finalize your pipe insulation project agreement with your selected Direct Install Pipe Insulation Trade Ally contractor and **complete your project by the Incentive Reservation Expiration date** shown in **Section 2B**.
* **Step 6:** After installation, your Direct Install Pipe Insulation Trade Ally contractor will complete **Part 3** of this form and submit all required project paperwork to Energy Trust, including photos of the completed install and detailed invoices, by the Incentive Reservation Expiration date. Energy Trust will review these materials before paying incentive funds directly to your Direct Install Pipe Insulation Trade Ally contractor.
* **Step 7:** YourDirect Install Pipe Insulation Trade Ally contractor will deduct the Energy Trust incentive amount from your invoice, and you’ll pay any remaining invoice balance for your project directly to your Direct Install Pipe Insulation Trade Ally contractor.

Part 1: Participant and Site Information

Section 1A: Contact Information

|  |  |
| --- | --- |
| Participant Company Name  | Contact Name  |
| Site Address  | City  | Zip  |
| Phone  [ ]  Mobile [ ]  Work | Email  |
| **Direct Install Pipe Insulation Trade Ally** Company Name  | Contact Name  |
| **(Optional) Mechanical Contractor/General Contractor Info**Company Name  | Contact Name  |

Section 1B: Utility Information *(If the site’s rate code does not appear in the table below, it may not qualify.)*

|  |  |  |
| --- | --- | --- |
| Utility (choose one) | Account Number | Rate Code (choose one) |
| [ ]  NW Natural |  | [ ]  03C [ ]  03I [ ]  31CSF [ ]  31CSI [ ]  31ISF [ ]  31ISI [ ]  32CSF [ ]  32CSI [ ]  32ISF [ ]  32ISI [ ]  01CI [ ]  01 I |
| [ ]  Cascade Natural Gas |  | [ ]  104 [ ]  105 [ ]  111 [ ]  170 |
| [ ]  Avista |  | [ ]  420 [ ]  424 [ ]  440 [ ]  456 [ ]  439 [ ]  447 |

Section 1C: Terms and Conditions

1. **Eligibility/Application.** To apply for Energy Trust of Oregon, Inc.’s (Energy Trust) Trade Ally Direct Install Pipe Insulation offering (Offering) participation and incentives, Participant’s pipe insulation project installation site must be at an industrial facility and meet all other Offering eligibility criteria. Energy Trust incentives for this Offering are available to industrial, municipal, and agricultural NW Natural, Cascade Natural Gas, and Avista natural gas customers in Oregon on eligible rate schedules. Additional eligibility restrictions may apply. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust. This applicationmust be filled out completely and accurately. Please retain a copy of this application. Energy Trust will not be responsible for lost documentation pertaining to this application request. Failure to provide all required application information by deadlines may result in incentive disqualification or delay or withholding of payment.
2. **Incentives.** Funds for incentives are limited and subject to budget availability. Details of the Offering, including incentive levels, are subject to change without advance notice. Participant agrees that any reserved Energy Trust incentives provided towards the cost of Participant’s Offering-qualifying pipe insulation measures in connection with this agreement will be paid directly to Participant’s Direct Install Pipe Insulation Trade Ally contractor. Participant is required to pay the balance of the invoice, if any. Incentive amounts paid will not exceed eligible pipe insulation project costs. Funds reserved are not transferable to any other project or property. Energy Trust retains the right to withdraw an incentive reservation at any point during the reservation period if we determine that Participant’s project is not progressing appropriately and in good faith to perform timely completion of project work by the Incentive Reservation Expiration Date. Pipe insulation measures receiving incentives via this Offering do not qualify for Energy Trust incentives under any other Energy Trust offering. Incentive funding for the Offering is subject to Energy Trust per-project, and per-site, per-year, maximums.
3. **Energy Efficiency Measures.** Participant is solely responsible for engaging its selected Direct Install Pipe Insulation Trade Ally contractor to implement Offering-qualifying pipe insulation measures and for ensuring that all work performed is in compliance with all laws, regulations and safety, building, environmental and permitting codes and any manufacturer instructions. Participant understands and agrees that, in order to qualify for Energy Trust’s Offering incentives, Participant’s Direct Install Pipe Insulation Trade Ally must complete Offering-qualifying pipe insulation measures and provide all required documentation to Energy Trust to request incentives, according to Offering requirements. **Participant agrees to cooperate with the Direct Install Pipe Insulation Trade Ally to timely complete the pipe insulation measures and submit all required documentation by the Incentive Reservation Expiration Deadline.** Any request for an extension beyond the Incentive Reservation Expiration Date must be submitted to Energy Trust in writing and in advance for review and consideration.
4. **Verification.** Pipe insulation measure installations may be selected for an on-site verification review. Should a Participant's facility be chosen for verification, satisfactory completion of that verification must occur before the Energy Trust incentive payment will be issued to Participant’s Direct Install Pipe Insulation Trade Ally contractor. Energy Trust's verification is for the purpose of incentive payment only. No warranty is implied.
5. **Access and Evaluation.** Energy Trust and/or its representatives may request access to the property for verification or evaluation purposes. Participant agrees to cooperate with evaluation as a requirement of this 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 project documentation related to the measure(s), and (iii) information about the energy use and operations of the measure(s) and/or project site(s) for the purposes of evaluating the energy savings during and after measure completion. Participant further agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided service to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.
6. **Disclaimer/No Liability/Indemnity.** Participant and Direct Install Pipe Insulation Trade Ally contractor shall have a separate agreement for the pipe insulation purchase and installation work. Participant understands that, while Energy Trust may provide incentive funding for the Direct Install Pipe Insulation Trade Ally to reduce the cost of Participant’s Offering-qualifying pipe Insulation measures, the Direct Install Pipe Insulation Trade Ally is an independent contractor responsible for its work and Energy Trust is not performing or supervising the energy efficiency measures work for Participant, nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any associated equipment. Energy Trust does not guarantee any energy-savings results. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with this agreement or its participation in the Offering or the measures. **Energy Trust's liability to Participant is limited to recovery of amounts of any incentive payment owed to the Direct Install Pipe Insulation Trade Ally as described herein and under no circumstances will Energy Trust be liable to Participant for any further amount whatsoever or for any other damages, whether characterized as general, special, direct indirect, punitive, consequential or otherwise. Participant hereby indemnifies Energy Trust from and against any and all losses, liabilities, damages, claims, suits, actions, judgments, assessments, costs and expenses, including but not limited to any interest, penalties, or attorneys’ fees arising out of or connected with this agreement; provided, however, that as applied to any State of Oregon agency or political subdivision thereof, this indemnification obligation applies to the extent permitted by the Oregon Tort Claims Act, ORS 30.260 through 30.300 and Article XI, Section 7 of the Oregon Constitution. Energy Trust is not responsible for any tax liability which may be imposed as a result of payment of any incentives.** 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.
7. **Hazardous Materials.** Energy Trust and its representatives shall have no responsibility for the discovery, presence, handling, removal, or disposal of or exposure of persons to hazardous materials of any kind in connection with Participant's facility, including without limitation asbestos, asbestos products, PCBs, or other toxic substances.
8. **No Endorsement.** The fact that the names of particular manufacturers, contractors, products or systems may appear on this application or in the program or promotion 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.** Participant hereby confirms that it has reasonably attempted to identify all of its utility accounts for its identified site(s) in this incentive application. 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 utility accounts for the identified site(s), including those utility accounts identified in this incentive application and any other of Participant’s utility accounts that may be associated with such site(s) that Participant is not able to reasonably identify at this time. 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).

**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’s 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.

1. **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.

Part 2: Pre-Authorization and Submittal

Section 2A: Request for Project Pre-Authorization *(To be completed by Direct Install Pipe Insulation Contractor and submitted to Energy Trust for review)*

The estimated incentive amount for the pipe insulation project shown below has been calculated by a Direct Install Pipe Insulation Trade Ally contractor, to be reviewed by an Energy Trust representative.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Fluid** | **Pressure Temperature/ Range** | **Nominal Pipe Diameter (in)** | **Maximum Incentive per lineal ft ($)** |  | **Proposed Lineal Feet** |  | **Maximum Incentive Allowance** | **Trade Ally Estimated Charges** |  | **Estimated Energy Trust Incentive Payment** |
| Low Pressure Steam | <15 psig or 212-249 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |
| Medium Pressure Steam | 15-200 psig or 250-388 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |
| Process Hot Water | 160-211 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |

**Section 2B: Project Pre-Authorization and Incentive Reservation Information** *(****To be completed by Energy Trust.******Unless this section has been completed by Energy Trust and Energy Trust receives Participant’s signed Participation and Incentive Agreement by the Submittal Deadline shown in Section 2C, this application is incomplete, and the proposed project described in Section 2A above does not qualify for incentives****)*

Based upon the proposed project as shown in **Section 2A** above and Direct Install Trade Ally contractor’s submitted project quote, an Energy Trust program representative has calculated the following energy savings and estimated Energy Trust incentive in accordance with current program requirements and incentive levels and per site, per-project limits.

|  |  |  |  |
| --- | --- | --- | --- |
| **Measure** | **EstimatedEnergy Savings** | **EstimatedEnergy Trust Incentive**  | **EstimatedParticipant Cost** |
| Trade Ally Direct Install Pipe Insulation  |        Therms  | $      | $      |
| Subject to the Terms and Conditions of this agreement, if Participant signs and submits this **Participation and Incentive Agreement** to Energy Trust by the **Section 2C: Submittal Deadline**, Energy Trust will reserve the estimated incentive amount shown in this **Section 2B** above for Participant’s proposed pipe insulation project **until the Incentive Reservation Expiration Date indicated below**. The actual incentive amount paid may vary from the estimate shown depending on the project as-installed and the actual, final project costs, but will not exceed the estimate listed. |
| **Incentive Reservation Expiration Date** |  |
| Energy Trust Program Reviewer:  | Name:      | Date:       |

Section 2C: Submittal Deadline

|  |
| --- |
| To reserve the Offering incentives, as described above, Participant must complete, sign, and return this application to an Energy Trust program representative by the Submittal Deadline listed below. Details of this Program, including incentives, are subject to change.  |
| Deadline to Submit Participant’s Signed Participation and Incentive Agreement:       |

Section 2D: Participation and Incentive Agreement *(see Step 4, signature required and must be returned to Energy Trust by Submittal Deadline shown above and prior to project installation start date)*

|  |
| --- |
| By signing below, you represent to Energy Trust that (i) you are duly authorized to sign this agreement on behalf of named Participant named in **Section 1A**, (ii) the information provided herein is accurate and truthful to the best of your knowledge, (iii) Participant has read, understands, and agrees to the terms and conditions, and (iv) Participant agrees to notify Energy Trust of any delays that would impact this date, change orders affecting Measure costs or energy savings, or of any decision to abandon the project or any individual Measure listed.  |
| Authorized Representative Name  |  | Signature | Date |  |
| *(printed name)* |

Part 3: Project Completion

Section 3A: Direct Install Pipe Insulation Installation Incentive Payment Amount Approval

***(To be completed by the Direct Install Pipe Insulation Trade Ally)***

This section must be completed to request incentive payment. Measures must meet program requirements to qualify for incentives. Condensate piping should be recorded under the corresponding steam pressure section. Incentive amounts paid will not exceed eligible pipe insulation project costs.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Fluid** | **Pressure Temperature/ Range** | **Nominal Pipe Diameter (in)** | **Maximum Incentive per lineal ft ($)** |  | **Installed Lineal Feet** |  | **Maximum Incentive Allowance** | **Trade Ally Charges** |  | **Energy Trust Incentive Payment** |
| Low Pressure Steam | <15 psig or 212-249 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |
| Medium Pressure Steam | 15-200 psig or 250-388 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |
| Process Hot Water | 160-211 °F | 1/2" to 1" | $35  | x |       | = |       |       |  |       |
| 1-1/4" to 2" | $40  | x |       | = |       |       |  |       |
| 2-1/2" to 3-1/2" | $45  | x |       | = |       |       |  |       |
| 4" to 6" | $50  | x |       | = |       |       |  |       |
| 8" to 10" | $65  | x |       | = |       |       |  |       |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  | **Total Incentive:** |  |       |

Section 3B: Direct Install Pipe Insulation Trade Ally Contractor Signature

|  |
| --- |
| By signing below, I represent that (i) Direct Install Pipe Insulation Trade Ally is an active, approved Direct Install Pipe Insulation Trade Ally authorized to participate in the Direct Install Pipe Insulation and has completed the energy efficiency measures summarized above at Participant's site in accordance with the trade ally agreement with Energy Trust (***Forms 1171A, 471A, and 472DIPI***) and Direct Install Pipe Insulation Offering requirements, (ii) all required accompanying documentation (i.e. this completed and signed ***Form 401DIPI*** signed by Participant and obtained prior to beginning work, and invoice(s)) is attached, (iii) the information contained herein is accurate, truthful and complete to the best of your knowledge and (iv) Direct Install Pipe Insulation Trade Ally is hereby requesting incentive payment. Direct Install Pipe Insulation Trade Ally understands that this ***Form 401DIPI*** and all other required documentation must be submitted to the email address listed below By the Incentive Reservation Deadline shown in **Section 2B.** |
| Business Name of Direct Install Pipe Insulation Trade Ally Contractor  |  |
| Mailing Address |  | City |  | State |  | Zip |  |
| Authorized RepresentativeName |  | Signature | Date |  |
| *(printed name)* |