

# Direct Install Pipe Insulation Trade Ally Addendum

Industrial | Addendum | Form 472<sub>DIP</sub>



## To be completed by Trade Ally Applicant

Energy Trust is seeking Production Efficiency Trade Ally contractors that are qualified and capable of completing pipe insulation and jacketing installation projects, at eligible natural gas customer sites in Oregon, to participate in an industrial energy efficiency Trade Ally Direct Install Pipe Insulation Offering (Offering). Energy Trust will pay cash incentives, for qualifying industrial pipe insulation projects completed in eligible customer facilities, directly to the Direct Install Pipe Insulation Trade Ally contractor, who will deduct the incentive amount from the customer invoice.

**This is the application to become a participating Direct Install Pipe Insulation Trade Ally contractor.** The application process will not be complete until (1) Energy Trust has received this completed Application and all required accompanying documentation, and (2) Applicant has successfully completed a required Energy Trust reference check and informational training on the Offering. Additional information may be requested by Energy Trust to complete its review process.

If Applicant is approved for Offering participation, an Energy Trust representative will complete Section 6 below (the **Direct Install Pipe Insulation Trade Ally Approval Notice**) and email a signed copy of the approval notice to you.

**Only approved Direct Install Pipe Insulation Trade Allies will be authorized to offer Energy Trust's Direct Install Pipe Insulation Offering incentives to eligible customers for qualifying pipe insulation installations.**

## Section 1: Minimum Criteria for Offering Participation

Confirm that the Applicant trade ally company named in Section 2 below meets all of the following minimum criteria to submit this application to participate in the Offering:

- Is currently an approved Energy Trust Production Efficiency Trade Ally contractor, in good standing; and
- Has read and understands the **Terms and Conditions for Participation** (see Section 3), the provided **Trade Ally Direct Install Pipe Insulation Offering Requirements and Procedures Handbook** and is a licensed insulation installation contractor capable of completing qualifying Pipe Insulation Offering measures and submitting required incentive documentation to Energy Trust according to the Pipe Insulation Offering requirements.

In addition, Applicant understands this application will be subject to the following additional review criteria:

- Achieve a satisfactory rating, as determined by Energy Trust in its sole discretion, on a reference check for Applicant-completed pipe insulation and jacketing installation projects on hot water or steam systems at industrial facilities; and
- Attend and complete, to Energy Trust's satisfaction, a required orientation meeting on Offering requirements.

## Section 2: Applicant Information

Applicant/Company Name (must be a current Energy Trust Production Efficiency Trade Ally)			
Designated Contact (individual who would act as Company's primary point of contact for the Offering interactions with Energy Trust)			
Primary Phone		Email Address	
Address		City	State Zip

# Direct Install Pipe Insulation Trade Ally Addendum

Industrial | Addendum | Form 472<sub>DIP</sub>



To be completed by Trade Ally Applicant

## Section 3: Applicant Customer References

By completing this information, you are granting Energy Trust permission to contact each of the references listed below regarding an Applicant-completed pipe insulation installation project. Reference company and contact listed should have direct experience and knowledge of Applicant's work performed on a completed pipe insulation and jacketing installation project on a hot water or steam system at an industrial facility. Additional references may be required.

### Reference 1 (Required)

Company Name			
Primary Contact		Year of Pipe Insulation Installation	
Primary Phone		Contact Email Address	
Site Address	City	State	Zip

### Reference 2 (Required)

Company Name			
Primary Contact		Year of Pipe Insulation Installation	
Primary Phone		Contact Email Address	
Site Address	City	State	Zip

### Reference 3 (Required)

Company Name			
Primary Contact		Year of Pipe Insulation Installation	
Primary Phone		Contact Email Address	
Site Address	City	State	Zip

### Reference 4 (Required)

Company Name			
Primary Contact		Year of Pipe Insulation Installation	
Primary Phone		Contact Email Address	
Site Address	City	State	Zip

### Reference 5 (Required)

Company Name			
Primary Contact		Year of Pipe Insulation Installation	
Primary Phone		Contact Email Address	
Site Address	City	State	Zip

### Production Efficiency

PO Box 14673 • Portland, OR 97293  
1.866.202.0576 phone • 503.465.3793 fax  
[Production@energytrust.org](mailto:Production@energytrust.org)

# Direct Install Pipe Insulation Trade Ally Addendum

Industrial | Addendum | Form 472DIPI



To be completed by Trade Ally Applicant

## Section 4: Terms and Conditions for Participation

The Applicant named in Section 2 above is submitting this application to Energy Trust of Oregon, Inc. (Energy Trust) to become an approved Direct Install Pipe Insulation Trade Ally, entitled to receive the benefits thereof. This application is being submitted as Applicant's offer and will constitute a binding legal agreement IF AND ONLY IF Energy Trust grants this application as described herein. Energy Trust will not review incomplete applications and may request additional references, proof of qualifications or other relevant information before it determines this Application complete for review. Failure to provide any required information is grounds for denial. Energy Trust, in its sole discretion, will determine whether to accept or reject Applicant's submitted Application. Energy Trust may, in its sole discretion, limit its approved pool of Direct Install Pipe Insulation Trade Allies.

If Applicant is approved by Energy Trust as an authorized "Direct Install Pipe Insulation Trade Ally," Applicant agrees to all of the following **Terms and Conditions for Participation**, including those incorporated by reference into this agreement:

- 1. Incorporation by Reference.** In addition to the Terms and Conditions for Participation set forth in this **Form 472DIPI: Direct Install Pipe Insulation Trade Ally Addendum**, all terms and conditions set forth in the: (i) **Form 1171A: Trade Ally Enrollment Application** and (ii) **Form 471A: Production Efficiency Trade Ally Addendum** agreement, including, but not limited to all definitions and operating procedures, are hereby fully incorporated into this agreement by this reference.
- 2. Required Orientation.** In addition to the required prerequisite informational training on the Offering requirements, Direct Install Pipe Insulation Trade Ally's personnel who will perform a role in delivering the Direct Install Pipe Insulation Offering may be required to participate in additional informational orientation sessions on the Offering, conducted by Energy Trust's Production Efficiency (Industry & Agriculture) program (Program). Such orientation trainings are for Program purposes only.
- 3. Offering Participation.** Direct Install Pipe Insulation Trade Ally will accurately communicate the Direct Install Pipe Insulation Offering (Offering) to its customers and will be professional at all times at Offering participants' sites and in communicating with Energy Trust and its representatives. Prior to making Offering incentives available to a customer, Direct Install Pipe Insulation Trade Ally will review and confirm customer information, site eligibility criteria, estimated total lineal feet of qualifying pipe to be insulated, and the proposed project cost and incentive estimate with a Program representative. Direct Install Pipe Insulation Trade Ally will follow the Offering eligibility and incentive pre-authorization process outlined in the **Direct Install Pipe Insulation Offering Requirements & Procedures Handbook**. Following receipt of a Program pre-authorization email, Direct Install Pipe Insulation Trade Ally will obtain a signed **Form 401DIPI: Trade Ally Direct Install Pipe Insulation Offering Participation and Incentive Agreement** from the customer before beginning any Direct Install Pipe Insulation Offering project installation work. The Direct Install Pipe Insulation Trade Ally is solely responsible for all contracting arrangements with its customers that choose to participate in the Offering for a project that includes any qualifying Offering measures. Direct Install Pipe Insulation Trade Ally will clearly explain and itemize, during project scoping and prior to beginning any Offering work for a customer, any installation items or special site considerations which will result in additional costs to the customer beyond those amounts which would be fully offset by the Offering incentives. To qualify for Energy Trust incentives, the completed Direct Install Pipe Insulation measures must fully meet all Offering criteria. Energy Trust's Offering incentives are intended to benefit customers participating in the Offering and Direct Install Pipe Insulation Trade Ally will provide written pricing/invoice documentation clearly indicating the participant received the full amount of the Energy Trust's Offering incentives as a deduction to Direct Install Pipe Insulation Trade Ally's invoiced purchase and installation cost for pipe insulation projects that include qualifying Offering measures. Direct Install Pipe Insulation Trade Ally agrees to abide by any additional requirements, specifications or quality control requirements for the Offering as set forth in the **Trade Ally Direct Install Pipe Insulation Offering Requirements & Procedures Handbook** and as may otherwise be provided or communicated to Direct Install Pipe Insulation Trade Ally during training or thereafter.
- 4. Completion Documentation.** Direct Install Pipe Insulation Trade Ally will (i) obtain the Offering participant's signature on the required **Form 401DIPI** prior to initiating Offering services, and (ii) timely complete the Offering-eligible measures and submit all required completion documentation to the Offering in accordance with Offering procedures and deadlines. Direct Install Pipe Insulation Trade Ally will respond to and resolve requests for missing information, quality control corrective actions and to other Energy Trust requests in a timely manner, or risk losing Offering participation benefits.
- 5. Incentive Payment.** Energy Trust will provide the Offering incentives, in amounts consistent with the **Form 401DIPI**, directly to Direct Install Pipe Insulation Trade Ally for qualifying Offering measures; provided, however, that in no event will any incentive exceed the actual cost of the project. Direct Install Pipe Insulation Trade Ally understands and agrees that Energy Trust will not provide Offering incentives to Direct Install Pipe Insulation Trade Ally for an ineligible customer site or for any non-qualifying project and Direct Install Pipe Insulation Trade Ally fully assumes this risk. If Energy Trust does not have a current complete, accurate, and verifiable W-9 form on file for Direct Install Pipe Insulation Trade Ally, one must be provided before Direct Install Pipe Insulation Trade Ally will be eligible to receive any incentives. Allow 6-8 weeks for incentive processing following submission of all required documentation. Failure to provide all required documentation may result in delay or withholding of incentive payment.

# Direct Install Pipe Insulation Trade Ally Addendum

Industrial | Addendum | Form 472<sub>DIPI</sub>



## To be completed by Trade Ally Applicant

6. **Verification.** Direct Install Pipe Insulation Trade Ally will cooperate with Energy Trust, including but not limited to coordinating with its Program representatives, on scheduling any Energy Trust- required post-verification reviews. Measures must meet Energy Trust's verification requirements in order to qualify for Direct Install Pipe Insulation Offering incentives. Program reviews and verifications are for Energy Trust purposes only, to assist in determinations of measure conformance with Offering requirements and incentive eligibility. No warranty is implied.
7. **Offering Expiration/Discontinuation.** The Direct Install Pipe Insulation Offering subject to change and incentive budget availability. Energy Trust may modify or discontinue the Offering at any time. Upon receiving any discontinuation notice from Energy Trust, Direct Install Pipe Insulation Trade Ally will not initiate or otherwise make any additional commitments to customers in connection with the Offering and will work with Energy Trust to complete any Offering projects already in process and submit in a timely manner all required project documentation for incentive payment.
8. **Termination.** Direct Install Pipe Insulation Trade Ally acknowledges and agrees that Energy Trust may suspend and/or end Trade Ally's eligibility to participate in the Offering at any time, upon written notice, for failure to abide by Offering requirements, for violation of any of these Terms and Conditions for Participation, if Direct Install Pipe Insulation Trade Ally's Production Efficiency Trade Ally status is suspended or terminated, or for any other reason as determined by Energy Trust in its sole discretion. Direct Install Pipe Insulation Trade Ally's obligation to maintain all Energy Trust Offering and Program participant information as confidential shall survive termination of this agreement. Direct Install Pipe Insulation Trade Ally may terminate its participation in the Offering at any time by providing notice to Energy Trust.

## Section 5: Applicant Authorized Signature

(NOTE: Additional Trade and/or Customer References May Be Requested in Connection with this Application)

By signing below, I represent to Energy Trust that (i) I am duly authorized to submit this Direct Install Pipe Insulation Trade Ally Addendum application on behalf of the Applicant named in Section 2; (ii) the information provided herein is true, accurate, and complete, (iii) I have read, understand, and accept the terms and conditions of the **Form 1171A**, the **Form 471A**, and this **Form 472DIPI** Addendum application. I further understand and accept that approval or rejection of this application is in the sole discretion of Energy Trust and that ONLY upon receipt of a signed "Direct Install Pipe Insulation Trade Ally Approval Notice" as described herein will Applicant be a participating Direct Install Pipe Insulation Trade Ally.

Authorized  
Representative

(printed name)

Title

Signature

Date

**FOR PROGRAM USE** (This section to be completed by Energy Trust Production Efficiency program representative)

## SECTION 6: Direct Install Pipe Insulation Trade Ally Approval Notice

**If and only if** Applicant is approved for Promotion participation, a Program representative will sign and return a copy of this **Direct Install Pipe Insulation Trade Ally Approval Notice** to Applicant.

Program  
Representative Name

Title

Signature

Approval Date