

Energy Efficiency Practices Training (BOC)

Existing Buildings | Incentive Application | Form 125T



Building Operators Certification/Training Certificate of Completion (BOC) is a professional development program delivered in Oregon by Northwest Water & Energy Education Institute (NWEEI). Energy Trust is making incentives available to assist eligible participants with training costs associated with completing the BOC (Level 1 or Level 2) course.

Steps to completion:

1. Complete application information, including:

- This completed and signed **Form 125T** incentive application;
- Copy of Participant's paid BOC course invoice/receipt for its building operator/energy manager(s) listed. Any other funds reducing the actual course cost paid (such as a scholarship or grant funds) must be disclosed;
- Proof of successful BOC training course completion for its building operator/energy manager(s) listed; and
- A completed IRS Form W9 for Participant. Energy Trust incentives will be paid to the Participant entity listed (not individuals).

All information must be completed for processing; failure to include all required information may result in delayed or withholding of incentive payment. See **Additional Terms and Conditions** for more information.

2. Submit mail, fax or email form and documentation together to:

Energy Trust – BOC Training incentive
 615 SW Alder Street, #200
 Portland, OR 97205
 1.866.605.1676 phone
 1.503.525.6150 fax
 existingbuildings@energytrust.org

Need-to-know information:

- Energy Trust must receive applications within 90 days from the Participant's listed building operator/energy manager's successful BOC training course completion.
- To apply for the BOC incentive, the Participant's building operator/energy manager must successfully complete the training course and be regularly working in an eligible commercial, institutional, multifamily (greater than 70,000 sq. ft.), or government building that (i) is either located in Oregon and receiving service under a qualifying rate schedule of Portland General Electric (PGE), Pacific Power, NW Natural, Cascade Natural Gas, or Avista, or is located in Washington and receiving natural gas service under a qualifying rate schedule of NW Natural; and (ii) receives primary space heating service from the participating utility and, in multifamily properties, provides heating for the property's dwelling units via a central system.
- The actual Energy Trust incentive paid will not exceed \$1,600 per qualifying building operator/energy manager or the actual amount paid by Participant for such qualifying BOC training course, whichever is less. If the building operator/energy manager is working in an eligible multifamily property that has primary space heating provided by a participating natural gas utility but is not also receiving electric service from a participating electric utility, the actual Energy Trust incentive paid will not exceed \$400 per qualifying building operator/energy manager or the actual amount paid by Participant for such qualifying BOC training course, whichever is less.
- Participants are only eligible for one incentive per individual building operator/energy manager in a three-year period regardless of level of BOC attained.
- Read the Additional Terms and Conditions, and sign in the Participant Signature box.

Participant Information *Program Use Only:* Project ID

Company (Legal Business Name)				(the "Participant")			
Mailing Address			City	State	Zip		
Contact Name			Contact Email	Phone	County		

► All fields below are required and must be completed

BOC Student Name (Please Enter)	Building Address (Please enter location where the named BOC student regularly works)	Electric Utility (Pacific Power, PGE, Other)	Natural Gas Utility (NW Natural, Cascade Natural Gas, Avista, Other, None)	Primary Space Heat Type (Natural Gas, Electric, Other)	Building Sq Ft (Please enter)	Building Type (Existing Commercial Building or Multifamily Building)	BOC Level (1 or 2)	Date of Course Start Date (MM/DD/YYYY)	Date of Course Completion (MM/DD/YYYY)	If BOC level 2, date of level 1 certification (if incentive was paid by Energy Trust) (MM/DD/YYYY)	Incentive Estimate

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Additional Terms and Conditions

- APPLICATION:** This **Form 125T: Building Operator Certification (BOC) Incentive Application** must be filled out completely, truthfully and accurately. To qualify for this incentive, Energy Trust must receive a complete application, with all required accompanying documentation **within 90 days from all listed building operator/energy manager's BOC training course completion date.** "Training course completion date" is the date the building operator/energy manager successfully completes the BOC training course (not the certification date, which typically occurs later). Documentation for all building operator/energy managers listed on this application must be submitted with this application within the required timeframe; otherwise Participant must submit separate application forms. Participant is encouraged to keep copies of this application form and any accompanying documentation submitted to Energy Trust for its records.
- ELIGIBILITY:** To be eligible to apply for the BOC incentive, Participant's listed building operator/energy manager must meet the eligibility criteria outlined above in the **Need-to-Know Information** and as further detailed in these **Additional Terms and Conditions.** Participant's building located in Oregon must receive service for primary heating from a participating utility via a customer account established under a qualifying (public purpose charge) rate schedule to be eligible to apply for BOC incentives. If Participant's building where the building operator/energy manager is working is located in Oregon and served under a NW Natural rate schedule listed in **Section 10** below, then the BOC incentive funding is subject to the additional requirements outlined in **Section 10 (Natural Gas Non-Transportation Agreement)** below. Transportation service or Combination service customer accounts are not eligible for Energy Trust natural gas incentive funding. Buildings located in Washington must receive primary heating under a NW Natural Commercial Firm or Interruptible Sales customer account established under Rate Schedule 1, 3, 41, or 42 to be eligible. Please contact us before submitting this application if you have any questions about eligibility.
- INCENTIVES:** Participant understands and agrees that Energy Trust may contact NWEI to verify cost, qualifications or training completion information prior to issuing any incentive payment. Participant is required to disclose to Energy Trust any other funds reducing the actual course cost paid by Participant for any building operator/energy manager listed (such as a scholarship or grant funds). The incentive provided will depend on the BOC incentive amount in effect as of the individual's BOC course start date. Details of the Program, including incentives and other requirements, are subject to change. Final determination of eligibility for incentives rests solely with Energy Trust. Funds for incentives are limited and are subject to availability.
- PAYMENT:** Incentives will be paid to the named Participant entity for qualifying applications at the mailing address indicated in this application. Please allow 60 days from Energy Trust's receipt of all information for delivery of payment. Failure to deliver all required documentation may result in a delay or withholding of payment.
- TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed on the Participant as a result of payment of the 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.
- INFORMATION RELEASE:** Participant agrees that Energy Trust may include some or all of the following information in reports or other documentation submitted to the Energy Trust Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, Bonneville Power Administration, the Oregon Legislature or other state agencies as necessary to meet Energy Trust responsibilities: Participant's name, city or county of business, a description of any Energy Trust services or incentives provided, or any resulting energy-savings or generation. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate.
- NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor or product in promoting its programs. The fact that the names of particular manufacturers, contractors, products or systems may appear on this application or elsewhere in its program offerings does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.
- DISCLAIMER / NO LIABILITY:** Participant understands and agrees that, while Energy Trust may provide Participant with incentive funding as described in this agreement, Energy Trust is not responsible in any way for the BOC program, content, training or performance. Energy Trust does not guarantee any particular energy savings results by its approval of the application or by any other of its actions.
- SIGNATURES:** 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.
- Natural Gas Non-Transportation Agreement:** 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, for qualifying natural gas energy efficiency measures, is subject to NW Natural's Schedule 360 filing with the Public Utility Commission of Oregon. NW Natural's Schedule 360 provides that a customer that transfers their account to a Transportation Service Type or a Combination Service Type that includes Transportation Service may incur a one-time charge equal to the two-year proration of the total incentive amount received.
The Schedule 360 indicates that the charge will be calculated as follows: Charge = A/24 x (24 - B)
A= Energy Trust incentive paid on the relevant account; and
B= number of months that have elapsed since the relevant incentive was issued
If multiple incentives were paid on the relevant account, a proration of each incentive repayment will be calculated. The Schedule 360 provides example repayment calculations and also states that (i) a charge will not be assessed if the total incentive amounts received by such customer are \$25,000 or less; and (ii) when applicable, the charge must be paid in full as a condition of NW Natural's approval to change Service Type. Additional details about this charge can be reviewed in NW Natural's Schedule 360 (Industrial DSM Programs) filing. Contact your NW Natural account representative with questions. The Participant named above agrees (i) to notify Energy Trust at the same time as it notifies NW Natural to request a change from Sales Service to another Service Type as described above for the account(s) listed herein; and (ii) that Energy Trust will report information to NW Natural regarding the natural gas energy efficiency measures at this site and associated Energy Trust services and incentives provided.

Participant Signature

If I am returning this Incentive Application on behalf of Participant on paper, by my signature below, I represent to Energy Trust that (i) I am authorized to enter into this agreement on behalf of the named Participant (ii) I have completed this Incentive Application—Building Operator Certification Training (Form 125T) completely, truthfully and accurately to the best of my knowledge, and (iii) I have read, understand and agree to its terms and conditions.

If I am returning this Incentive Application on behalf of Participant electronically, by entering my name and title below, I represent to Energy Trust that (i) I am authorized to enter into this agreement on behalf of the named Participant (ii) I have completed this Incentive

Authorized Representative Signature		Date	
Print Name		Title	