

# Foodservice Equipment (Assisted Living and Campus Living)

Existing Multifamily | Incentive Application | Form 320F



## To be completed by Participant

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

<p><b>Who can apply:</b> 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.</p> <p><b>Steps to completion:</b></p> <ol style="list-style-type: none"> <li><b>1 Install</b> a qualifying energy efficiency improvement.</li> <li><b>2 Complete</b> application information and provide required supporting documentation, including:             <ul style="list-style-type: none"> <li>o W-9 for payee, if applicable</li> <li>o Invoice(s) for product and installation</li> <li>o Manufacturer spec sheet(s)</li> </ul> </li> <li><b>3 Submit</b> form by fax, email or mail along with supporting documentation to:  <b>Energy Trust of Oregon Existing Multifamily</b>                      111 SW Columbia St., Suite 945                      Portland, OR 97201                      1.877.510.2130 phone                      503.243.1154 fax  <a href="mailto:multifamily@energytrust.org">multifamily@energytrust.org</a> </li> <li><b>4 Receive</b> your check. Please allow six to eight weeks for incentive processing after completed application is received.</li> </ol> <p><b>What you need-to-know:</b></p> <ul style="list-style-type: none"> <li>• Energy Trust must receive applications within 90 days from equipment purchase and install.</li> <li>• Incomplete information will result in delayed payment or disqualification of the incentive.</li> <li>• A post-installation verification may be required to receive payment.</li> <li>• Use <b>Forms 320HVAC, 320WH, 320APP, or 320WX</b> for other Existing Multifamily upgrades</li> </ul>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:25%;">Energy Trust Use Only</td> <td style="width:25%;">Project ID</td> <td style="width:25%;">PT ID</td> <td style="width:25%;">Promo Code (Optional)</td> </tr> <tr> <td colspan="4" style="text-align:center;"><b>Incentive limits apply; see Terms &amp; Conditions</b></td> </tr> <tr> <td colspan="3"><b>Property Owner</b></td> <td style="text-align:right;"><input type="checkbox"/> Payee</td> </tr> <tr> <td colspan="4">Legal Name of Property Owner <span style="float:right;">(the "Participant")</span></td> </tr> <tr> <td colspan="2">Contact Name</td> <td colspan="2">Title</td> </tr> <tr> <td colspan="4">Mailing Address</td> </tr> <tr> <td colspan="2">City</td> <td>State</td> <td>Zip</td> </tr> <tr> <td colspan="2">Phone <input type="checkbox"/> Work <input type="checkbox"/> Cell</td> <td colspan="2">Email</td> </tr> <tr> <td colspan="2">Property Ownership <input type="checkbox"/> Investment Owner <input type="checkbox"/> Individual Unit Owner</td> <td colspan="2">Occupied by <input type="checkbox"/> Owner <input type="checkbox"/> Tenant</td> </tr> <tr> <td colspan="3">Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="text-align:right;"><i>If you checked Yes, a W-9 is required for payment.</i></td> </tr> <tr> <td colspan="4"><b>Property Representative</b> <i>(Skip section if you are an individual unit owner)</i></td> </tr> <tr> <td colspan="4">Company Name</td> </tr> <tr> <td colspan="2">Contact Name</td> <td colspan="2">Title</td> </tr> <tr> <td colspan="4">Mailing Address</td> </tr> <tr> <td colspan="2">City</td> <td>State</td> <td>Zip</td> </tr> <tr> <td colspan="2">Phone <input type="checkbox"/> Work <input type="checkbox"/> Cell</td> <td colspan="2">Email</td> </tr> <tr> <td colspan="4"><b>Property Information</b></td> </tr> <tr> <td colspan="4">Property Name</td> </tr> <tr> <td colspan="4">Address</td> </tr> <tr> <td colspan="2">City</td> <td>State</td> <td>Zip</td> </tr> <tr> <td colspan="2">Number of Buildings</td> <td>Number of Units</td> <td>Number of Bldg Levels</td> </tr> <tr> <td colspan="2">Year Built</td> <td colspan="2">Total Sq. 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<b>Water Heating</b> <i>(check all that apply)</i>			
<input type="checkbox"/> Electric	OR	<input type="checkbox"/> Gas	System type: <input type="checkbox"/> Central Boiler <input type="checkbox"/> Storage Tank <input type="checkbox"/> Tankless <input type="checkbox"/> Other _____

<b>Space Heating</b>		
<input type="checkbox"/> Electric	OR	<input type="checkbox"/> Gas

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ENERGY STAR® Cooking Equipment	Manufacturer	Model	Installed Cost	Qty	Incentive Requested
<input type="checkbox"/> Electric Combination Oven – 3-4 pan capacity <b>(\$500 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 3.0)*</a>			\$		\$
<input type="checkbox"/> Electric Combination Oven – 5-40 pan capacity <b>(\$1,000 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 3.0)*</a>			\$		\$
<input type="checkbox"/> Electric Convection Oven – full-size <b>(\$500 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 3.0)*</a> Accommodates standard full-size sheet pan at least 18" x 26" x 1"			\$		\$
<input type="checkbox"/> Electric Convection Oven – half-size <b>(\$300 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 3.0)*</a> Accommodates half-size sheet pan at least 18" x 13" x 1"			\$		\$
<input type="checkbox"/> Double Rack Gas Oven <b>(\$2,000 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 3.0)*</a> One removable double rack or two removable single racks to accommodate two full sheets per level, each pan at least 18" x 26" x 1"			\$		\$
<input type="checkbox"/> Electric Hot Food Cabinet – half-size <b>(\$450 each)</b> Must be active on <a href="#">ENERGY STAR's certified product list (version 2.0)**</a> Interior volume must be less than 13 cubic feet			\$		\$
* ENERGY STAR Certified Commercial Ovens product list: <a href="https://www.energystar.gov/productfinder/product/certified-commercial-ovens/results">https://www.energystar.gov/productfinder/product/certified-commercial-ovens/results</a> ** ENERGY STAR Certified Commercial Hot Food Holding Cabinets product list: <a href="https://www.energystar.gov/productfinder/product/certified-commercial-hot-food-holding-cabinets/results">https://www.energystar.gov/productfinder/product/certified-commercial-hot-food-holding-cabinets/results</a>					

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Steam Cookers	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Electric Steam Cooker <b>(\$2,500 each)</b> <b>Cooking energy efficiency must at least 62% and idle rate must be 300W or less</b>			\$		\$
<input type="checkbox"/> Gas Steam Cooker <b>(\$3,400 each)</b> <b>Cooking energy efficiency must be at least 43% and idle rate must be 2770 Btu/hr or less</b>			\$		\$

ENERGY STAR 3.0 Commercial Ice-Makers*	Requirements	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Commercial Batch Self-Contained Unit (SCU) <b>(\$180 each)</b>	<ul style="list-style-type: none"> <li>Self-contained Units: 200-4,000 lbs. per day</li> </ul>			\$		\$
<input type="checkbox"/> Commercial Batch or Continuous Air-cooled Ice-Making Head (IMH) <b>(\$400 each)</b>	<ul style="list-style-type: none"> <li>Batch Ice-Making Heads: 1,500-4,000 lbs. per day</li> <li>Continuous Ice-Making Heads: 820-4,000 lbs. per day</li> </ul>			\$		\$
<input type="checkbox"/> Commercial Batch or Continuous Air-cooled Remote Condensing Unit (RCU) <b>(\$400 each)</b>	<ul style="list-style-type: none"> <li>Batch Remote Condensing Units: 988-4,000 lbs. per day</li> <li>Continuous Remote Condensing Units: 800-4,000 lbs. per day</li> </ul>			\$		\$
* Must be active on ENERGY STAR Certified Commercial Ice Machines product list: <a href="https://www.energystar.gov/productfinder/product/certified-commercial-ice-machines/results">https://www.energystar.gov/productfinder/product/certified-commercial-ice-machines/results</a>						

Gas-fired Automatic Conveyor Broilers	Requirements	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Conveyor belt width less than 20" <b>(\$2,500 each)</b>	<ul style="list-style-type: none"> <li>Automatic conveyor with catalyst</li> <li>Input rate: below 80 kBtu/h, or dual stage, or modulating gas valve with a capability of throttling the input rate below 80 kBtu/h</li> <li>Installed under a Type 1 vent hood</li> </ul>			\$		\$
<input type="checkbox"/> Conveyor belt width 20" to 26" <b>(\$3,000 each)</b>				\$		\$
<input type="checkbox"/> Conveyor belt width greater than 26" <b>(\$3,500 each)</b>				\$		\$

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ENERGY STAR 3.0 Dishwashers*	Requirements	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Dishwasher, single tank conveyor <b>(\$900 each)</b>	<ul style="list-style-type: none"> <li>Dishwasher can be a low, dual or high temperature</li> <li>Property's electricity must be provided by a participating electric utility.</li> </ul>			\$		\$
<input type="checkbox"/> Dishwasher, multi-tank conveyor <b>(\$900 each)</b>	<ul style="list-style-type: none"> <li>Dishwasher must be either dual or high temperature</li> <li>Property's electricity must be provided by a participating electric utility.</li> </ul>			\$		\$
* Must be active on ENERGY STAR Certified Commercial Dishwashers product list: <a href="https://www.energystar.gov/productfinder/product/certified-commercial-dishwashers/results">https://www.energystar.gov/productfinder/product/certified-commercial-dishwashers/results</a>						

Commercial Vent Hood Retrofit	Requirements	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested	
<input type="checkbox"/> Commercial Vent Hood with Demand Controlled Ventilation <b>(\$1,500 per total controlled hp)</b>  Site has qualifying gas or qualifying electric heat	<ul style="list-style-type: none"> <li>Motor speeds must be controlled by a programmable controller, with scheduling, occupancy sensing, and heat sensing capabilities</li> <li>Variable speed control must be installed on both the make-up air unit motor and the hood exhaust motor</li> <li>Make up air must be tempered</li> <li>Total controlled motor horsepower must be at least 1.0 horsepower and cannot exceed total existing horsepower of makeup air unit and exhaust fan motor</li> </ul>			\$		\$	
<input type="checkbox"/> Commercial Vent Hood with Demand Controlled Ventilation <b>(\$900 per total controlled hp)</b>  Site has gas from a non-participating gas provider or non-electric heat with qualifying electric service		<b>Vent Hood Fan Motor</b>	<b>Make-up Air Fan Motor</b>				
		_____ hp	_____ hp				

Anti-Sweat Heater Controls	Requirements	Manufacturer	Model	Installed Cost	Quantity	Incentive Requested
<input type="checkbox"/> Low temperature case (below 0°F) <b>(\$80 per linear foot of door)</b>	<ul style="list-style-type: none"> <li>Eligible heater controls must reduce sweat by sensing humidity, dew point, or condensation.</li> <li>Site must not have an existing refrigeration energy management system, including ASH controls</li> <li>Site receives electricity from a participating electric utility</li> </ul>					
<input type="checkbox"/> Medium temperature case (1°F - 35°F) <b>(\$60 per linear foot of door)</b>						

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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**

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
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**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 equipment purchase and 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 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. 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 bonuses amounts, are subject to change. Visit [energytrust.org/multifamilyincentives](http://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.

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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.

**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.

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**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.