

Custom Energy Assessment Request

Existing Buildings | Form 100E



To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon

Who can apply:

Existing commercial, municipal or institutional facilities and existing multifamily properties consisting of 2+ connected dwelling units receiving electric service from Portland General Electric or Pacific Power or receiving natural gas service (under an eligible rate schedule) from Northwest Natural, Cascade Natural Gas or Avista. Final determination of eligibility for Energy Trust services or incentives rests solely with Energy Trust.

Steps:

1. Complete application information, including:

- Attach utility bills
- Signature and date at end of form
- Mail, fax, or email application to:

**Energy Trust of Oregon
Existing Buildings**
111 SW Columbia St, Suite 945
Portland, OR 97201

1.866.605.1676 phone

503.243.1154 fax

existingbuildings@energytrust.org

2. Fill out Multiple Sites Addendum (if applicable)

3. An Account Manager will contact you to determine if you qualify for a no-cost energy analysis.

Program Use Only

v2025.1

Reference ID

PT ID

Account Manager

Approved for SBO ☐

Participant Information

(the "Participant")

Legal Business Name (as shown on last tax return)

Assumed Business Name or DBA

Contact Name

Title

Participant Mailing Address

City

State

Zip

Primary Phone

Email

Business Type: ☐ Private Company

☐ Public/government

Project Role: ☐ Building Owner

☐ Tenant

☐ Property Manager

Project Type: ☐ Equipment Upgrade

☐ Tenant Improvement

☐ New Construction

☐ Renovation/Remodel

Would you like to be contacted about solar opportunities?

☐ Yes

☐ No

Project and Site Information

Multifamily Property ☒

Multiple Sites ☐

Project Name

Site Address

City

State

Zip

Do you have a project in mind? ☐ Yes ☐ No

Estimated Start Date

Estimated Completion Date

Project Description

Project Square Footage

Building Square Footage

Year Built

Total # of Buildings

Primary Heating Fuel Source ☐ Electricity ☐ Gas ☐ Other

Water Heating Fuel Source ☐ Electricity ☐ Gas ☐ Other

Primary use of Site: ☐ Office

☐ Retail

☐ Restaurant

☐ Grocery

☐ Schools K-12

☐ Lodging/ Hotel / Motel

☐ Laundry

☐ Hospital

☐ College

☐ Warehouse

☐ Manufacturing

☐ Relig./Spiritual

☐ Parking Structure

☐ Retirement Home

☐ Assembly

☐ Auto Service

☐ Gym/Athletic Club

☐ Other

Custom Energy Assessment Request

Existing Buildings | Form 100E



To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon

Multifamily Sites Only									
Multifamily Building Style:		<input type="radio"/> Low-Rise (1-3 stories)		<input type="radio"/> Duplex		<input type="radio"/> Townhome/Rowhouse			
		<input type="radio"/> Mid-Rise (4-8 stories)		<input type="radio"/> Triplex		<input type="radio"/> Other			
		<input type="radio"/> High-Rise (9 or more stories)		<input type="radio"/> Fourplex					
Multifamily Market:		<input type="radio"/> Affordable (i.e. fair market)		<input type="radio"/> Condominium/HOA		<input type="radio"/> Campus Living			
		<input type="radio"/> Market Rate		<input type="radio"/> Assisted Living/Retirement		<input type="radio"/> Other			
Is Participant applying for or receiving any Multifamily Energy Program (formerly known as the Low-Income Weatherization Program) funding through OHCS for any property identified in this Custom Energy Assessment Request?									
<input type="radio"/> Yes <input type="radio"/> No									
What is your purpose for enrolling with Existing Multifamily?									
Common Area Heating Fuel		<input type="radio"/> Electricity		<input type="radio"/> Gas		<input type="radio"/> Other		Common Area Laundry <input type="checkbox"/>	
Tenant Space Heating Fuel		<input type="radio"/> Electricity		<input type="radio"/> Gas		<input type="radio"/> Other		In-Unit Laundry <input type="checkbox"/>	
Spa Water Heating Fuel Source		<input type="radio"/> Electricity		<input type="radio"/> Gas		<input type="radio"/> Other			
Laundry Water Heating Fuel Source		<input type="radio"/> Electricity		<input type="radio"/> Gas		<input type="radio"/> Other			
Total # of Buildings		Total # of Units		Total # of Levels		Year Built		Total Sq. Ft of Buildings	

Small Business Sites Only	
Energy Trust may offer higher incentive amounts for qualifying projects at eligible small businesses. Small businesses must be local (not be a part of a nation-wide organization), have only two or fewer brick-and-mortar business locations, and must meet one or more criteria below. Please select all that apply:	
<input type="checkbox"/> Business employs 20 or fewer employees across the entire company	
<input type="checkbox"/> Business operates in a brick-and-mortar commercial space that is 20,000 sq. ft. or less in size (includes all buildings on a single site)	
Total # of employees across the entire company	
Total # of Businesses locations across the entire company	
*Final determination of customer eligibility for small business incentives rests solely with Energy Trust.	

Utility Information (Please attach a copy of your most recent utility bill. List multiple utility numbers if applicable.)	
Requesting an assessment for Multiple Sites? If so, all sites must be owned by the Participant named on page 1.	
To submit information for multiple sites owned by the same Participant, the Participant must attach a completed Multiple Sites Addendum . The Multiple Sites Addendum is fully incorporated and made a part of this Custom Energy Assessment Request.	
Electric Utility: <input type="radio"/> Portland General Electric (PGE) <input type="radio"/> Pacific Power (PPL) <input type="radio"/> Other	Rate Schedule
Account Number:	or
Gas Utility: <input type="radio"/> NW Natural <input type="radio"/> Cascade Natural Gas <input type="radio"/> Avista <input type="radio"/> Other	Rate Schedule
Account Number:	or

Custom Energy Assessment Request

Existing Buildings | Form 100E



To be completed by Participant

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

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 **Form 100E: Custom Energy Assessment Request**. By signing and submitting this **Form 100E** 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 **Form 100E** 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).

Thank you for your interest in Energy Trust's Existing Buildings program. Following our review of the information you have provided, a program representative will contact you to discuss potential next steps for identifying energy saving opportunities at your facility.

Certain buildings may qualify to receive a technical analysis study or other technical assistance to further examine potential energy saving opportunities. Participant may refuse to accept these additional services if it wishes. By accepting a Program-provided technical analysis study or other technical assistance, the Participant accepts and agrees to the Terms and Conditions listed below.

Custom Energy Assessment Request

Existing Buildings | Form 100E



To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon

Terms and Conditions:

1. APPLICATION. This **Form 100E** must be filled out completely, truthfully and accurately. If Participant, as named above in this application, is submitting an accompanying Multiple Sites Addendum to enroll more than one site under this application, such Multiple Sites Addendum is hereby fully incorporated into this Custom Energy Assessment Request by this reference. Funds for Energy Trust's Existing Buildings program (Program) are limited and subject to availability. Program details, including incentives and Program-provided technical assistance, are subject to change without prior notice. The Program Management Contractor (PMC) provides services for the Program on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application.

2. TECHNICAL ASSISTANCE. Participant may qualify to receive a technical analysis study or other technical assistance (Technical Assistance) from the Program to help identify potential energy efficiency measures at your building(s). If so, a representative will contact you to discuss scheduling. If Participant accepts any Technical Assistance, then Participant agrees to inform the Program representative of applicable job site regulations for the building, if any, prior to the site visit. Energy Trust reserves the right to revise or terminate the Program-provided Technical Assistance at any time. Determination of eligibility for Technical Assistance rests solely with Energy Trust. Not all applicants will qualify.

3. ENERGY EFFICIENCY MEASURES. After Energy Trust's review of a technical analysis study, Energy Trust will notify Participant if any of the identified measures meet cost-effectiveness and other Program requirements. If so, additional Energy Trust incentives may be available to help Participant offset the costs of implementing certain energy saving projects. If measures are identified that meet Program criteria and Participant does not choose to implement any of them, it may affect eligibility for future Technical Assistance under the Program. Any decision by Energy Trust to fund a technical analysis study or other Technical Assistance for Participant hereunder does not in any way imply a commitment by Energy Trust to provide any funding for any further Technical Assistance or any related or unrelated energy project(s).

4. ACCESS AND EVALUATION. For the purpose of conducting Technical Assistance, Participant agrees to provide Energy Trust's Program representative(s) with access to the property identified as the site address herein and represents that it has or will obtain any and all necessary consents and is in compliance with applicable laws and regulations. Reviews and evaluations of the project work before, during and after measures installation are a critical part of Energy Trust's verification and evaluation process for energy savings and incentive calculations. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s) to review and evaluate the project, and (ii) requested technical and other project documentation related to the measures. If Participant is a multifamily property owner/representative providing Energy Trust with in-unit access to perform any Technical Assistance (ex. a walk-through survey), Participant will (i) make authorized Participant personnel available to be present and accompany Program representatives, (ii) comply with all laws and stipulations in tenant leases regarding Participant notification and access to tenant units; and (iii) provide Program representatives with advance notice of any and all units where tenants have not agreed to allow Energy Trust access and ensure that Program representative(s) are prohibited from accessing such units.

5. 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 on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

6. DISCLAIMER. Participant understands that, while Energy Trust may provide funding towards certain Technical Assistance, Energy Trust is not performing or supervising the work. The Technical Assistance is not intended to serve as a detailed engineering design or project cost document, and Energy Trust expects Participant to perform its own independent reviews of any identified measures. ENERGY TRUST AND ITS REPRESENTATIVES MAKE NO REPRESENTATION, EXPRESS OR IMPLIED, REGARDING THE DESIGN, SIZING, INSTALLATION, CONSTRUCTION, RELIABILITY, EFFICIENCY, PERFORMANCE, OPERATION, MAINTENANCE OR USE OF ANY ENERGY EFFICIENCY EQUIPMENT OR SYSTEMS ANALYZED. ANY DECISIONS REGARDING THE SELECTION, DESIGN, INSTALLATION, USE AND OPERATION OF ANY ENERGY EFFICIENCY EQUIPMENT OR SYSTEMS SHALL BE MADE AT THE SOLE DISCRETION OF AND ARE THE SOLE RESPONSIBILITY OF PARTICIPANT. Energy Trust and its representatives do not claim or guarantee any particular energy savings results by approval of this application, or by any other of their respective actions.

7. LIMITATION OF LIABILITY. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with any Technical Assistance or energy efficiency measure(s). ENERGY TRUST'S LIABILITY IS LIMITED TO THE AMOUNT OF ANY INCENTIVE FUNDS OWED FOR PARTICIPANT'S TECHNICAL ASSISTANCE AS AUTHORIZED UNDER THIS AGREEMENT. IN NO EVENT WILL ENERGY TRUST OR ITS REPRESENTATIVES BE LIABLE PURSUANT TO THIS AGREEMENT TO PARTICIPANT OR ANY THIRD PARTY FOR ANY OTHER DAMAGES, WHETHER CHARACTERIZED AS GENERAL, SPECIAL, DIRECT, INDIRECT, PUNITIVE, CONSEQUENTIAL, OR OTHERWISE. Additionally, 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.

Custom Energy Assessment Request

Existing Buildings | Form 100E



To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon

8. IMPACTS OF SELF DIRECTION (PGE or Pacific Power Electric Large Energy User Customers Only). Energy Trust's energy efficiency programs are funded by amounts charged in rates for cost-effective energy efficiency. If Participant is a large electricity consumer eligible to self-direct a listed site's cost-effective energy efficiency charge pursuant to ORS 757.054(4), through the Oregon Department of Energy, notify Energy Trust's Program representative when submitting this form. A site's self-direction status affects eligibility for Energy Trust incentives.

9. HAZARDOUS MATERIALS. Energy Trust and its representatives shall have no responsibility for the discovery, presence, handling, or disposal of or exposure of persons to hazardous materials of any kind in connection with Participant's site or facility, including without limitation asbestos, asbestos products, PCBs or other toxic substances.

10. 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.

11. 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 energy 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, unless a specific disclosure is required by applicable law or governmental or court order.

Participant Signature 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).

By signing below, you represent to Energy Trust that (i) you are duly authorized to sign this agreement, including but not limited to the **Energy Information Release**, on behalf of the named Participant, and (ii) the information provided in this **Form 100E** is accurate and truthful to the best of your knowledge.

Authorized Representative Signature	Print Name	Date
Telephone	Email	
Contact for Site Visit	Site Visit Telephone	

Assistance Provided by

Organization or Company	Person Preparing Form	Date Prepared
-------------------------	-----------------------	---------------