Commercial Buildings | Incentive Application | Form 120p-wa-NB



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

Who can apply:	Program Use Only v2024.3
Incentives are available for qualifying new natural gas energy-saving equipment installed at a commercial, municipal or institutional facility that is	Reference ID PT ID
a natural gas Commercial Firm or Interruptible Sales customer of NW Natural on Rate Schedule 1, 3, 41 or 42 and located in the State of	Participant Information
Washington. Additional requirements apply; see Terms and Conditions for details.	(the "Participant")
	Legal Business Name (must match Participant's submitted W-9)
Steps to completion:	
1 Install a qualifying energy efficiency improvement.	Assumed Business Name or DBA
Complete application information and provide required supporting documentation, including:     The applicable measure or equipment section with equipment filled out	Contact Name Title
Manufacturer specification sheet(s)     Itemized invoice(s)	Contact Name
W-9 for payee	Participant Mailing Address City State Zip
3 Submit form and documentation online, by mail, fax or email 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	Primary Phone Email Address  Business Type: O Private Company O Public/government  Participant Role: O Building Owner O Tenant O Property Manager  New Building Project Type  □ Equipment Upgrade □ Renovation/Remodel □ New Construction
4 Receive your check. Please allow six to eight weeks for incentive processing after completed application and supporting documentation are received.	2 Equipment opgrade 2 Renovation/Remoder 2 New Construction
What you need-to-know:	
<ul> <li>Energy Trust must receive applications within 90 days from purchase</li> </ul>	Trade Ally/Contractor/Installer Company Name (if applicable)
and installation  o All information must be completed for processing; incomplete	Utility Information
information may result in delayed payment or incentive disqualification	
A representative may reach out to request a copy of your current	NW Natural Account #:
electric and natural gas utility bills to confirm your account information and incentive eligibility	Rate Schedule:
<ul> <li>If you want to assign your incentive to your trade ally/contractor or other payee, complete the Option to Assign Payment section</li> <li>Need help filling out this form? Call the program at 1-866-605-1676</li> </ul>	
Project and Facility Information	Primary Heating Fuel Source
	O Electric O Gas O Other
Site Address* City State Zip	Water Heating Fuel Source
	O Electric O Gas O Other
Contact name for Site Visit Phone number for Site Visit	<u> </u>
f requesting incentives for multiple locations,use the Multiple Sites section to list each location's si	ite address, utility infomation, and heating fuel sources
Project Square Footage Building Use Type:   Assembly Date Set	ervice   College  Grocery  Gym/Athletic Club  Hospital
uilding Square Footage   □ Laundry/Dry □ Lodging/ Hotel / Mc	otel   Manufacturing   Office   Parking Structure   Religious/Spiritual
Year Built Restaurant Retail Retirement H	lome
Participant Signature	
Signature: By signing below, I represent that (i) I am authorized to enter into this agree behalf of the named Participant, (ii) I have completed this application truthfully and accunstallations have been completed to my satisfaction and all accompanying invoice(s) a	urately to the best of my knowledge, and (iii) the energy efficiency equipment
Authorized Representative Signature Name (print	ted) Date

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#### **TERMS AND CONDITIONS**

- 1. APPLICATION: All required information must be submitted before this application will be processed. Energy Trust must receive a complete 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. By submitting this application to Energy Trust, Participant represents that none of the equipment requesting incentives has already received an Energy Trust incentive at the time of purchase. Please retain a copy of this application and any accompanying documentation submitted to Energy Trust. Energy Trust's Existing Buildings 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. ELIGIBILITY: Program incentives are available for qualifying, new natural gas energy-saving equipment installed at a commercial, municipal or institutional facility that is a natural gas Commercial Firm or Interruptible Sales customer of NW Natural on Rate Schedule 1, 3, 41, or 42 and located in the State of Washington. Final determination of eligibility for incentives shall rest solely with Energy Trust. Additional eligibility restrictions may apply. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust.
- 3. 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 Option to Assign Payment along with this incentive 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.
- 4. PROJECT COST DOCUMENTATION: Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased and installed. 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. Certain equipment may require additional documentation as indicated in the energy efficiency specifications. Energy Trust reserves the right to request additional documentation as necessary for it to determine incentive eligibility and payment amount. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the purchase and installation of the specified 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 completion documentation and Energy Trust's incentive will not exceed an amount equal to the total eligible project costs minus such external funds.
- 5. 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 and demand in each service area and available incentive budget. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust. The total incentive provided (i) will depend upon the incentive amounts in effect, as posted on Energy Trust's website, as of the equipment purchase date, and (ii) will never exceed the total eligible project cost or a maximum of \$75,000. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentive(s) will never exceed the total documented eligible cost of the qualifying equipment or any per site maximums. Incentives paid to any Participant for all applications submitted to Program are limited to a maximum of \$75,000 per site per year.
- 6. VERIFICATION: Equipment installations may be selected for a post-installation verification review. Should Participant's facility 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.
- 7. 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.

8. 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 or elsewhere 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.

- 9. ELIGIBLE PRODUCTS: Products must be new and must meet Energy Trust energy efficiency specifications to qualify. These specifications may be found on the web at <a href="http://energytrust.org/commercial">http://energytrust.org/commercial</a> and are subject to change. If you or your vendor are not sure of the specifications, please call Energy Trust before proceeding.
- 10. EQUIPMENT INSTALLATION: Participant represents that (i) Participant 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.
- 11. ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property. 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 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 or after project 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.
- 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 incentives, 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 installation of 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. GOVERNING LAW: This agreement shall be exclusively governed by and construed in accordance with the laws of the state of Oregon, without regard to any conflicts of laws rules thereof.
- 14. 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).
- 15. 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 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.

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#### **Multiple Sites**

Location (Bldg Name / Store #)	Site Address	City	State	Gas Utility	Gas Account Number	Gas Rate Schedule	Primary Heating Fuel Source	Water Heating Fuel Source
				(select)			(select)	(select)
				(select)				(select)
				(select)				(select)
				(select)				(select)
				(select)				(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)

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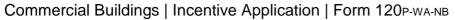
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#### **Option to Assign Incentive Payment**

PLEASE NOTE: The Energy Trust incentive payment will be made to Participant unless Participant and its designated Payee complete the section below to assign the payment to Payee. An IRS Form W-9 (Request for Taxpayer Identification Number and Certification) for the Payee named below must be attached if this option is selected.

PARTICIPANT AN	ID PAYE	E											
Both Participant ar check will be issue liabilities that may assignment, respo obligation of Partic Accordingly, Payer or the payment of failure to comply w pay any incentive to incentives for the i	ed to the be associately to the associate the incervith this actor which	Payee na ciated with for comply and Energy tands than a trive, and a greemen it is entitle.	amed bel h the inco ying with r Trust's t it shall in the ev t, Payee' ed to the	ow at the a entive pay the terms sole respo have no rivent that E 's sole rece Payee na	address ment. I and co nsibility ghts ag nergy <sup>1</sup> ourse s	s list n ad ondit / und ains Trus shall	ed beloved the second s	w and E Participa his ince ncentive Trust o ot pay the	nergy Trus int understantive agree e agreemen or the PMC he incentive icipant. Par	t is no ands the ment nt sha with re as a rticipa	ot respond that, notweshall con Il be to Forespect to result of the result of	sible viths ntinu Partic o su f Pa s En	e for any tax tanding this ue to be the cipant. uch assignmer rticipant's ergy Trust to
	<b>SIGNATURES:</b> By my signature below, I represent to Energy Trust that I have read this agreement and am duly authorized to sign this Option to Assign Incentive Payment on behalf of the party for whom I am signing.												
On behalf of Part (Authorized Represe	-		(prin	nted)			(signature)					Date	
Participant	:	(Legal busi	iness nam	e as shown o	on W9)				, ,				
On behalf of Pa (Authorized Represe	•		(prin	nted)					(signature)				Date
Payee Name	е	(Must mate	ch submitte	ed IRS Form	W-9)								
Mailing Address (for check)	Street	,					ity				State		Zip
Phone	2301		O Cell	O Office	0 1	Home		Email			Ciaio		't





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**HVAC** and Water Heating

EQUIPMENT	DESCRIPTION/REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
New Rooftop Unit (RTU) with Demand Control Ventilation (DCV)	All installed RTUs must be new units with Direct Expansion (DX) cooling and either gas furnace or heat pump heating  Must serve spaces not required by code to have DCV*  Economizer must be factory-installed or contractor-installed at the same time as RTU, with DCV included  Space must be heated by gas furnace	\$29 per ton			
	*Describe the space that the RTU will serve: (contact Energy Trust for eligible space types)				
Infrared Radiant	<ul> <li>Natural gas-fired, low intensity, non-condensing and positive pressure system</li> <li>Indoor area use only, no greater than 20,000 square feet</li> </ul>				
Heater	Non-Modulating:	\$1.25 per kBtu/h input			\$ -
	Modulating:	\$2.25 per kBtu/h input			s -
Commercial Condensing Gas Furnace	<ul> <li>Must be primary heating source for the space</li> <li>Input capacity must be less than 225,000 Btu/h</li> <li>Must have at least 95% Annual Fuel Utilization Efficiency (AFUE)</li> <li>Must have either multispeed or variable speed Electrically commutated Motor (ECM) supply fan</li> </ul>	\$8.25 per kBtu/h input			
Commercial Condensing Tank Water Heater	<ul> <li>Gas-condensing, storage-type water heater with integral tank volume at least 10 gallons</li> <li>Water heater input capacity must be greater than 75 kBtu/h per water heater</li> <li>Must have at least 94% Thermal Efficiency (TE) or recovery efficiency</li> <li>All building types eligible excluding offices less than 5,500 sq ft and commercial gyms without shower facilities</li> <li>Additional storage-only tanks may be present</li> <li>Site must have water heating provided by NW Natural</li> <li>Projects where existing water heater is functional, and not at the end of its useful life, do not qualify.</li> </ul>	\$3.50 per kBtu/h input			\$ -
Commercial Condensing Tankless Water Heater under 200 kBtu/h input	Gas-condensing units must function as central source for domestic hot water (DHW) heating Water Heater Uniform Energy Factor (UEF) must be at least 0.94 Water heater input must be less than 200 kBtu/h per water heater Additional hot water storage tanks cannot be added Approved models must be found here: www.ahridirectory.org Projects where existing water heater is functional, and not at the end of its useful life, do not qualify.  Is there an existing water storage tank attached?  Yes No If yes, what is the capacity?	\$140 each			\$ -
Commercial Condensing Tankless Water Heater/Boiler at least 200 kBtu/h input	<ul> <li>Gas-condensing domestic hot water (DHW) must not be used for space heating and must serve a central water heating system</li> <li>Integral tank volume must be less than 10 gallons</li> <li>Must have at least 94% Thermal Efficiency (TE)</li> <li>Water heater input capacity must be of at least 200 kBtu/h per water heater</li> <li>All building types eligible excluding offices less than 5,500 sq ft and commercial gyms without shower facilities</li> <li>Approved models must be found here: www.ahridirectory.org</li> </ul>	\$1.40 per kBtu/h input			\$ -





**HVAC** and Water Heating continued

EQUIPMENT	DESCRIPTION/REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
Gas-fired High-Efficiency Condensing HVAC Boiler	Must have at least 94% efficiency, either Annual Fuel Utilization Efficiency (AFUE) or Thermal Efficiency (TE)     Must have at least 5-to-1 turndown ratio     Must not be a backup, redundant or lagging boiler     Must be used for HVAC purposes: boilers used for domestic hot water (DHW), pool heating and 'heat adders' that serve water-source heat pump systems do not qualify     Boiler system design return temperature must be appropriate to condensing functionality	\$6.50 per kBtu/h input			s -

TOTALS FOR HVAC AND WATER HEATING	TOTAL INCENTIVES	TOTAL INSTALLED COST





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Lodging and Foodservice

EQUIPMENT	REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
ENERGY STAR® Commercial Laundry Washer, Common Areas	Clothes washers must be front-loading machines and ENERGY STAR rated¹ Must have gas water heating or Gas dryer, gas service provided by NW Natural Leased equipment must be new A signed lease agreement and documentation that identifies washer quantity, model number(s), and retail cost of clothes washer are required	\$100 each			s
Gas-fired Automatic	Automatic conveyor with catalyst Input rate must be below 80 kBtu/h or dual stage or modulating gas valve with a capability of throttling the input rate below 80 kBtu/h Installed under a Type I Vent Hood (used for appliances that produce grease and smoke)				
Conveyor Broiler	Total conveyor belt width less than 20"	\$2,500 each			\$
	Total conveyor belt width 20" to 26"	\$3,000 each			\$
	Total conveyor belt width greater than 26"	\$3,500 each			
Gas Convection Oven	Must be active on ENERGY STAR certified product list (version 3.0) <sup>2</sup> Full size which accommodates full sheet, at least 18" x 26" x 1"	\$315 each			\$
Gas Combination Oven	Must be active on ENERGY STAR certified product list (version 3.0) <sup>2</sup>	\$750 each			
Single Rack Gas Oven	Must be active on ENERGY STAR certified product list (version 3.0) <sup>2</sup> Removable single rack which accommodates full sheet, at least 18" x 26" x 1"	\$1,500 each			
Double Rack Gas Oven	Must be active on ENERGY STAR certified product list (version 3.0) <sup>2</sup> One removable double rack or two removable single racks which accommodate full sheets per level, each pan at least 18" x 26" x 1"	\$2,000 each			s
Gas Steam Cooker	Cooking energy efficiency must be at least 43%     Idle Rate must be 2770 Btu/h or less	\$3,400 each			\$
	Must be a replacement, gas-fired pool heater. Heater must not have a continuously burning pilot light     Maximum 400 kBtu/h capacity per heater, not to exceed a total of 1,000 kBtu/h for all heaters combined     Minimum 94% thermal efficiency for condensing heaters, minimum 84%	Minimu Covered Pool	um Pool Area	Pool R	inimum equired lool Sq
	efficiency for non-condensing heaters  • Site must receive gas from NW Natural	No	Condensing	Indoor Outdoor	Ft 1275 700
	Covered and not covered pools both qualify. Eligible pool covers include solid track, bubble type, or foam type with storage reels     Pool must meet minimum area requirements as listed in the table to the	Yes	Condensing		2150 1050
Commercial Swimming Pool	right  Pool Location: O Indoor O Outdoor	No	Non- Condensing	Indoor or Outdoor	500
Heater	Pool Cover: • Covered with Existing Cover • Not Covered	Yes	Non- Condensing	Indoor Outdoor	850 500
	Number of heaters serving pool:	¢ 00 per ex thet ser-			
	Non-condensing Heater, Covered	\$.90 per sq ft of area served by heater			
	Non-condensing Heater, Not Covered	\$1.00 per sq ft of area served by heater			
	Condensing Heater, Covered	\$3.00 per sq ft of area served by heater			
	Condensing Heater, Not Covered	\$5.00 per sq ft of area served by heater			

https://www.energystar.gov/productfinder/product/certified-commercial-clothes-washers/results

<sup>&</sup>lt;sup>1</sup> ENERGY STAR Certified Commercial Clothes Washers product list:

 $<sup>{}^2 \</sup>hbox{ENERGY STAR Certified Commercial Ovens product list:} \\ \underline{\hbox{https://www.energystar.gov/product/inder/product/certified-commercial-ovens/results} \\ \\$ 





TRC is a Program Management Contractor for Energy Trust of Oregon. Program Use Only v2024.3 Reference ID PTID Lodging and Foodservice continued INCENTIVE INSTALLED EQUIPMENT REQUIREMENTS INCENTIVE PER UNIT QUANTITY TOTAL COST Valves must be installed on commercial gas-fired dryers. Dryers must have 200 or fewer pounds of dry clothes capacity or 65 or fewer cubic feet of dryer drum volume Two-stage Gas Valve on Valves can be installed on new or existing gas-fired dryers. Clothes Dryers Sites with on-premises laundry \$700 each Coin-operated laundromats \$400 each Each ozone laundry system must be new and installed on either new or existing programmable commercial washing machine(s) Each ozone generator may serve one or more washers All existing/new washers at a facility must be reprogrammed and connected to work with the new ozone laundry system. Partial conversions are not eligible Water heating for clothes washing must be provided by gas-fired boilers or gas water heaters with gas service provided by NW Natural The ozone laundry system(s) must transfer ozone into the water with Ozone Laundry either the venturi injection or bubble diffusion process Systems Total laundry capacity is less than 75 lbs: \$5,000 per system Total laundry capacity is between 75 and 125 lbs: \$7,500 per system

TOTALS FOR LODGING AND FOOD SERVICE	TOTAL INCENTIVES	TOTAL INSTALLED COST

Total laundry capacity is between 126 and 400 lbs:

Total laundry capacity is between 401 and 600 lbs:

Total laundry capacity is greater than 600 lbs:

\$15,000 per system

\$25,000 per system

\$30,000 per system





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#### Grocery

EQUIPMENT	REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
	Must be a new refrigerated display case with doors, additional cases are added or existing cases are replaced     Doors must be transparent. Cases with solid doors do not qualify     Refurbished cases do not qualify				
New Cooler Cases with Doors	Vertical cases - Coolers only	\$150 per linear ft of door			
	Horizontal cases - Coolers or Freezers	\$150 per linear ft of door			

TOTALS FOR LODGING AND FOOD SERVICE	TOTAL INCENTIVES	TOTAL INSTALLED COST