

Overview and Eligibility

A signed copy of the **Project Enrollment Application (Form 510A)** must accompany or precede this form, and only those projects approved for enrollment by the New Buildings program (Program) can apply for incentive funding.

To be eligible for Low-rise Multifamily ENERGY STAR® incentives:

- The project must be permitted under the 2008 Oregon Residential Specialty Code Chapter 11: Energy Conservation and the 2010 Oregon Energy Efficiency Specialty Code for applicable space-types (i.e. common areas).
- The project must be a low-rise (3 stories or less) residential building with vertically stacked units.
- Project Owner must be applying for the ENERGY STAR qualification for the project through Oregon Department of Energy (ODOE).
- The project must meet the Northwest ENERGY STAR Homes Certification Requirements for Multifamily Homes in Oregon, as described in the Multifamily Builder Option Package (BOP). These requirements are available at www.northwestenergystar.com.

To be eligible for low income project verification incentives, Project Owner must submit a Low Income Confirmation, which can be obtained from the Program. Energy efficiency measures receiving Oregon Housing & Community Services (OHCS) funding through the Low Income Weatherization Assistance Program are not eligible for Energy Trust incentives. If Project Owner is applying for OHCS funding for the project, Project Owner must contact the Program to discuss eligibility and additional documentation may be required.

Project Owner may also apply for Standard Equipment Incentives and Lighting Calculator Incentives (for example, for qualifying energy efficiency improvements in the building's common areas), but may not apply for any other incentives through the Program. Any measure which, either separately or as part of a project, has or will receive an incentive from any other Energy Trust offering is ineligible.

Steps to Participate

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Select an approved Trade Ally verifier (Verifier). To be eligible for incentives, Energy Trust requires that the Northwest ENERGY STAR Verifier that you use also be registered as an Energy Trust Trade Ally verifier. The Verifier must perform all site inspections. See the Energy Trust website (<http://energytrust.org/library/find-a-contractor>) and select the Multifamily New Construction program for a complete list of Verifiers.
3. Complete this **Incentive Application** and submit it to the Program prior to the project's first inspection by the project's Verifier, along with:
 - A Low Income Confirmation Letter, if the project qualifies as a low income project
 - Project Owner's current W-9
4. Following its review of the application, Energy Trust will notify Project Owner via e-mail of its decision. If the application is approved for an incentive reservation, you will receive a written notice. The incentive reservation notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to install the measures and submit all required completion documentation).
5. Schedule your first and second project inspections with your Verifier. The first inspection must occur before construction is complete (when insulation is visible) and the final inspection must occur after installation of all applicable measures.
6. Within 2 business days of the final inspection and prior to the established incentive reservation deadline, the Verifier must submit the **Completion Certification - Site Inspection (Form 540LM)** to the Program and mark the project as "Certified Inspection" in the "Status" field in the Northwest ENERGY STAR database (<http://energystarhomes-tracking.org>). A site verification may be required by the Program prior to final payment.
7. Step 6 above will complete the process required for incentive payment unless Project Owner has applied for additional installation incentives for the project using the **Standard Equipment Incentive Application (Form 520S)** or the **Lighting Calculator Incentive Application (Form 520LC)**. If Project Owner is applying for these additional installation incentives, then Project Owner must also submit a **Payment Request (Form 540PR)** to request incentive payment.



For Program Use Only EOM: OM: Project ID: FT ID:

Portland Energy Conservation, Inc. (PECI) is a Program Management Contractor (PMC) for Energy Trust of Oregon, Inc.

Incentive Calculation

Installation incentives to the Project Owner are based on project type and location and are calculated per unit. **Incentive Applications** submitted for installation incentives are combined by Energy Trust into a single incentive reservation and payment. The total amount of installation incentives payable for a single project will never exceed \$499,999. From the table below, please select your project type.

Project Type	Incentive Amount per Unit
Multifamily ENERGY STAR Homes Northwest BOP 1 (Primary heating: Ducted Gas Furnace or Heat Pump, Ductless Heat Pump, Ductless Gas Unit Heater, Hydronic Gas System)	\$300
Multifamily ENERGY STAR Homes Northwest BOP 2 (Primary heating: Zonal Electric Heating, Packaged Terminal Heat Pump)	\$300

In addition to installation incentives payable to the Project Owner, Energy Trust provides verification incentives directly to Verifiers to help reduce the cost to Project Owner for the required ENERGY STAR verification inspections. The maximum number of units eligible for installation incentives (subject to the Program cap) will be the maximum amount of units eligible for verification incentives. The following table lists the verification incentives.

Incentive Type (Incentives listed below will be paid directly to Verifier in accordance with Program requirements)	Incentive Amount per Unit
Verification of projects located in both gas and electric participating utility territories	\$100
Verification of projects located in only electric participating territory (with electric primary heating)	\$100
Verification of projects located in only gas participating territory (with gas primary heating)	\$75
Verification of low income multifamily projects	\$250
ENERGY STAR® Certification Fee incentive for low income multifamily projects (additional to verification incentive)	\$75

Project Information

Project Owner Name	Company
<input type="text"/>	<input type="text"/>

Building/Project Name	Project ID (if known)
<input type="text"/>	<input type="text"/>

Expected Construction Completion Date	Number of Units	Will units have air conditioning?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Primary Heating System		
Ducted Gas Furnace	Ductless Heat Pump	Electric resistance baseboard
Ducted Heat Pump	Ductless Gas Unit Heater	Hydronic Gas System Package Terminal Heat Pumps (PTHP)

Check here if Project Owner is applying for or receiving funding for any energy efficiency measures associated with this project through the OHCS. If so, additional documentation may be required.

TRADE ALLY VERIFIER

Analyst Name	Title	Phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Firm Name	Address	City, State Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Incentive Application: Low-rise Multifamily ENERGY STAR®
Business Energy Solutions – New Buildings**



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Project Owner Payment Information

PAYMENT INFORMATION (Project Owner incentive check will be made payable to the company below):

Legal Company Name (must match W-9)	Assumed Business Name (if different)

Check Mailing Address	City, State Zip

Owner Representative	Title	Phone	Email

Submittal

Project Owner understands and agrees that the terms and conditions contained in this **Incentive Application** are in addition to, and governed by, its **Project Enrollment Application** agreement with Energy Trust for the identified project. Project Owner further agrees that all of the information in the submitted **Project Enrollment Application** agreement remains true and correct as of the date of this submission. By my signature below, I represent and warrant to Energy Trust that I am authorized to sign this form on behalf of Project Owner and that the information provided herein is true and correct to the best of my knowledge.

SUBMITTED BY: (Must be an authorized representative of Project Owner)

Type or Print Name Here	Title	Date

Firm Name	Phone	Email

FOR MORE INFORMATION:

Please visit energytrust.org/business or call 1.877.467.0930