

**Form 371A
Existing Homes Trade Ally Addendum**



To be completed by Trade Ally Applicant

Steps to Becoming an Existing Homes Trade Ally Contractor

Complete the **Form 1171A: Trade Ally Enrollment Application** and read the terms and conditions.
 Complete this **Form 371A: Existing Homes Trade Ally Addendum** and sign the signature box on page 3.
 Submit a General Liability Certificate by downloading and filling out the faxable request form at <http://energytrust.org/trade-ally/join/>.
 Submit a Worker's Compensation Certificate, if non-exempt, with valid expiration dates.
 Fax the enrollment application, addendum, and insurance certificate(s) to Energy Trust's Trade Ally department at 503-200-1207.
 Sign up for the two required training webinars, at www.energytrust.org/trainingcalendar.

- Existing Homes – Trade Ally Program Training – Part 1
- Existing Homes – Weatherization Specification Webinar

Energy Trust will not review any Trade Ally applicant until all required components have been received. Energy Trust will provide written notice if approved as an Existing Homes Trade Ally contractor.

Applicant Information

Company Name	DBA (if applicable, for website listing)
Contact Name	Email (mandatory for all communication)

Services Currently Offered on Existing Homes (these will be listed on the website, check all that apply)

Air Leakage – Testing/Sealing HVAC Water Heaters – Conventional Windows
 Comprehensive Remodeling Insulation Water Heaters – Tankless Other (Specify)
 Duct Testing/Sealing*
 * certification required

Specialties Currently Offered on Existing Homes (these will be listed on the website, check all that apply)

HVAC – Heat Pump Insulation—Attic Boilers
 HVAC – Gas Furnace Insulation—Boiler Pipe Heat Pump Commissioning
 HVAC – Gas Unit Heater Insulation—Duct Other (Specify)
 HVAC – Gas Fireplace Insulation—Floor
 HVAC – Geothermal Heat Insulation—Wall

Technical Certifications

If your company has employees with any of the certifications listed below, please fill out the appropriate information. These certifications will be listed on the website.

Certification	Specify	Technician Name(s)
BPI	<input type="checkbox"/> Building Analyst <input type="checkbox"/> Envelope Professional <input type="checkbox"/> Heating Professional	
PTCS	<input type="checkbox"/> Duct Sealing <input type="checkbox"/> Heat Pump	
ODOE	<input type="checkbox"/> Duct Sealing <input type="checkbox"/> Heat Pump & AC	
CheckMe!™	<input type="checkbox"/> Heat Pump	

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Terms and Conditions All terms and conditions set forth in the *Form 1171A: Trade Ally Enrollment Application* are part of this Application and hereby incorporated by reference.

1. Once approved, applicant will be listed on Energy Trust's website as a participating trade ally, and will appear as a participating trade ally on lists distributed at Program home energy reviews in accordance with the Existing Homes quality control policies and procedures.
2. Once approved, Applicant may offer Program participants the monetary incentives which Energy Trust offers for energy efficiency measures. While all contractors may offer the base incentives, only approved trade allies are able to offer special packages and bonus incentives.
3. Once approved, Applicant will be offered training in energy efficient technologies and installation techniques as well as diagnostic equipment at a discounted price.
4. Once approved, and after submitting the minimum number of projects for incentives and maintaining the minimum quality control score for a two star trade ally rating in accordance with program requirements, and having no unresolved customer concerns, applicant will be eligible for funding from the Trade Ally Development Fund.
5. Once approved, Applicant will receive periodic program updates including information about limited time offers and bonus packages that require trade ally installation. Additionally, once approved, Applicant will be able to access specialized Program staff available for technical and procedural assistance Monday – Friday 8 am – 5 pm.
6. Applicant must successfully complete required Program training provided by Energy Trust which will cover incentive form submission requirements, weatherization specifications, and a review of quality control, probation and termination policies.
7. **Upon approval, Applicant shall properly assist Program participants in applying for incentives and applicable Oregon tax credits.**
8. Applicant must have, and agrees to maintain, state-required workers' compensation insurance as well as acceptable occurrence-based commercial general liability (including contractual liability and completed operations coverage) with not less than \$1,000,000 per occurrence for bodily injury and property damage liability, with an annual aggregate limit of not less than \$1,000,000. Applicant's commercial general liability policy must include (i) an "additional insured" provision providing that Energy Trust of Oregon, Inc. and its directors, officers and employees are included as an Additional Insured, and include (ii) cross liability and waiver of subrogation clauses, and (iii) an acknowledgement that in the event of a loss, Applicant's policy will be primary.
9. Evidence of insurance for the workers compensation and commercial general liability coverages, as described above, must be submitted to Energy Trust, in the form of a certificate of insurance, along with this application. The certificate of commercial general liability coverage must clearly identify "Energy Trust of Oregon, Inc." as an additional insured. Once approved, Applicant must promptly provide such certificates of insurance to Energy Trust on an ongoing basis during the term of the agreement.
10. Applicant must maintain adequate automobile liability insurance and, upon request, must promptly provide evidence of such coverage satisfactory to Energy Trust in its sole discretion.
11. Applicant must be licensed by the Construction Contractors Board (CCB) and/or Washington State if required by law or regulations and maintain such licensing once approved as a trade ally, comply with laws applicable to them (such as workers' compensation and employment laws), and continuously maintain all appropriate licenses and certifications for the work they perform as a trade ally.
12. Upon approval as an Existing Homes trade ally, Applicant will indemnify, reimburse, hold harmless and defend Energy Trust and PMC, as well as the directors, officers, employees, agents and other consultants from any claims of any kind including, but not limited to, all fees and charges of engineers, architects, attorneys and other professionals and all court or arbitration or other disputed resolution costs arising out of or connected in any way with any act or omission of Applicant, its employees, agents, or subcontractors of any tier or any other entity or person for whom Applicant is liable, in the performance or nonperformance of services as a part of the Program.
13. Energy Trust's and PMC's liability in connection with this Application or the Program shall be limited to payment of earned monetary incentives. Under no circumstances shall Energy Trust or PMC be liable to trade allies for any further amounts in connection with the Program under any legal theory, including any special, consequential, incidental or indirect damages.
14. Upon approval as an Existing Homes trade ally, Applicant shall respond to customer inquiries or concerns within a maximum of three business days and offer bids on all job requests or direct them to another trade ally.

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- 15. Upon approval as an Existing Homes trade ally, Applicant shall be subject to all Program performance specifications and quality control requirements as set forth in the program guideline information provided to trade ally at Program trade ally trainings.

Authorized Signature

By signing this application, I represent that (i) I am duly authorized to submit this **Form 371A: Existing Homes Trade Ally Addendum** on behalf of the Applicant; (ii) the information provided in the **Form 1171A: Trade Ally Enrollment Application** (the Enrollment Application) continues to be true, accurate and complete; (iii) the information provided in this Existing Homes Trade Ally Addendum (Existing Homes Trade Ally Application) is true, accurate, and complete, (iv) I have read the Enrollment Application and this Existing Homes Trade Ally Application in their entireties; (v) I understand, and accept the terms and conditions contained in the Enrollment Application and this Existing Homes Trade Ally Application; and (vi) I understand and accept that all such terms and conditions continue to apply and control upon my approval as an Existing Homes Trade Ally. I further understand and accept that approval or rejection of this Existing Homes Trade Ally Application is in the sole discretion of Energy Trust and that only upon receipt of any Application Approval Notice will Applicant be a Existing Homes Trade Ally of Energy Trust.

NOTE: Trade and/or Customer References May Be Requested

Name of Company	Authorized Representative (printed name)	Title
Signature		Date