

*Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon.
Energy Trust Improvements and Incentives listed on this document are valid from January 1, 2012, through April 30, 2012.*

| Energy Improvement | Energy Trust Incentive | | Potential Oregon Tax Credit | | Potential Federal Tax Credits | |
|---|---|---|--|---|-------------------------------|------------|
| | Requirements | Incentive | Requirements | Tax Credit | Requirements | Tax Credit |
| Attic Insulation | If R-18 or less, then insulate to R-38* | \$0.25 per square foot; incentive shall not exceed cost | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Floor Insulation | If R-11 or less, Insulate to R-30, or fill cavity* | \$0.30 per square foot; incentive shall not exceed cost | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Knee Wall Insulation | If R-4 or less, Insulate 2x4 cavities to R-15 Insulate 2x6 cavities to R-21 Cover attic side of wall with vapor permeable air barrier* | \$0.30 per square foot; incentive shall not exceed cost | n/a | | n/a | |
| Wall Insulation | If R-4 or less, then insulate to R-11 or fill cavity* | \$0.30 per square foot; incentive shall not exceed cost | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Rim Joist Insulation | If R-4 or less, then insulate to R-15* | \$0.30 per square foot; incentive shall not exceed cost | n/a | | n/a | |
| Duct Insulation | If R-2 or less, then insulate to R-11* | 50% of cost, up to \$100; incentive shall not exceed cost | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Boiler Pipe Insulation | If R-2 or less, then insulate to R-8* | \$0.50 per linear foot; incentive shall not exceed cost | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Duct Leakage Test | PTCS certified contractor* | \$35 per duct system tested; documentation required for test-only incentive | n/a | | n/a | |
| Duct Sealing for Electric Heated Homes | PTCS certified contractor.* PTCS Duct Sealing Certificate & NW Duct Sealing Form required | 50% of cost, up to \$400 per duct system, must have min. reduction 150 CFM ₅₀ and (1) min. of 50% reduction or (2) final CFM ₅₀ must be less than 10% floor area of conditioned space | PTCS certified contractor required. Additional rules apply, see www.oregon.gov/energy for details | 25% of cost, up to \$250; \$150 bonus if combined with ducted heat pump | n/a | |

Existing Homes

PO Box 40508 ♦ Portland, Oregon 97240-0508
1.866.311.1822 ♦ Fax 1.866.516.7592
energytrust.org

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| Duct Sealing for Gas Heated Homes | PTCS certified contractor.* PTCS Duct Sealing Certificate & NW Duct Sealing Form required. | 50% of cost, up to \$325 per duct system, must have min. reduction 150 CFM ₅₀ and (1) min. of 50% reduction or (2) final CFM ₅₀ must be less than 10% floor area of conditioned space | PTCS certified contractor required. Additional rules apply, see www.oregon.gov/energy for details | 25% of cost, up to \$250; \$150 bonus if combined with ducted heat pump or gas furnace | n/a | |
| Air Leakage Test | Blower Door test required.* | \$35 per home tested; documentation required for test-only incentive. *Only one incentive per building | n/a | | n/a | |
| Air Sealing for Electric Heated Homes | Not less than Minimum Ventilation Level; reduction limit waived with approved mechanical ventilation. Blower Door test required.* | 50% of cost, up to \$400 per residence or building, minimum reduction 300 CFM ₅₀ | n/a | | n/a | |
| Air Sealing for Gas Heated Homes | Not less than Minimum Ventilation Level; reduction limit waived with approved mechanical ventilation. Blower Door test required.* | 50% of cost, up to \$275 per residence or building, minimum reduction 300 CFM ₅₀ | n/a | | n/a | |
| Home Performance with ENERGY STAR® Assessment | Comprehensive home assessment must be performed by a Home Performance with ENERGY STAR trade ally contractor.** | \$150 per residential structure | n/a | | n/a | |
| Windows Tier 1 | U-Value = 0.26 to 0.30 | \$2.25 per square foot of window unit. | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |
| Windows Tier 2 | U-Value = 0.25 or less | \$3.50 per square foot of window unit. | If property is a rental, please contact Oregon Dept. of Energy for information on potential tax credits | | n/a | |

*Additional installation requirements apply; see current version of Existing Homes Weatherization Specifications Manual at <http://energytrust.org/trade-ally/programs/existing-homes/resources/> under General program resources for details.

** Incentives for air leakage test and duct leakage test are not available in conjunction with this home assessment incentive.

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| High-Efficiency Ducted Heat Pump Replacing an Electric Resistance Heat | 5-tons or greater unit, minimum HSPF 8.8 | \$400 | HSPF 9.0 or greater and minimum of 12 EER | 25% of cost, up to \$430 | n/a | |
| | Any size unit, minimum HSPF 9.0 | \$450 | | | | |
| High-Efficiency Ducted Heat Pump Upgrade or Replacement of Non-Electric Heat (example: propane, wood or oil) | 5-tons or greater unit, minimum HSPF 8.8 | \$200 | HSPF 9.0 or greater and minimum of 12 EER. For details, visit www.oregon.gov/energy | 25% of cost, up to \$430 | n/a | |
| | Any size unit, minimum HSPF 9.0 | \$250 | | | | |
| Ductless Heat Pump Replacing an Electric Resistance Heat | Must replace electric resistance heat in main area of home and be an inverter-driven model, have a five year warranty and be made by a manufacturer with a support network in the Pacific Northwest | \$800 per residential structure | For details, visit www.oregon.gov/energy | Up to \$400 | n/a | |
| Heat Pump Optimization | New ducted heat pumps only. CheckMe! or PTCS certified technicians only, data sheet required. | \$150 | New ducted heat pumps only. Work must be performed by a tax credit-certified technician . See www.oregon.gov/energy for details | 25% of cost of test, up to \$250 | n/a | |
| High-Efficiency Gas Furnace | Recommend: 90% or greater AFUE | Incentive expired April 30, 2010 | Furnace must meet Oregon tax credit criteria. For details, visit www.oregon.gov/energy | 25% of cost, up to \$350 | n/a | |
| Direct Vent Gas Unit Heater | 80% or greater AFUE | \$100 | n/a | | n/a | |

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| High-Efficiency Gas Fireplace – Tier 1 | 65-69% Fireplace Efficiency standard rating. Direct vent gas unit fireplace must be vented to outside with sealed combustion. | \$100 | n/a | | n/a | |
| High-Efficiency Gas Fireplace – Tier 2 | 70% or greater Fireplace Efficiency standard rating. Direct vent gas unit fireplace must be vented to outside with sealed combustion. | \$150 | n/a | | n/a | |
| High-Efficiency Gas Fireplace with Intermittent Pilot Light | Combined with qualifying high-efficiency fireplaces | + \$100 | n/a | | n/a | |
| High-Efficiency Gas Boiler | 88% AFUE, or greater | \$200 | n/a | | n/a | |
| Alternative On-Site Wastewater Treatment System | Customer application must include a Site Approval letter and a Certificate of Satisfactory Completion letter from the Oregon Department of Environmental Quality (DEQ). | \$400 | n/a | | n/a | |
| Electric Tank Water Heater | EF 0.93, or greater; heat pump water heaters are not eligible. | \$35 | n/a | | n/a | |
| High-Efficiency Electric Tank Water Heater | EF 0.94, or greater and a minimum 20-year tank warranty; heat pump water heaters are not eligible. | \$75 | n/a | | n/a | |
| Electric Solar Water Heater | System must meet Energy Trust installation requirements. Refer to www.energytrust.org/solarforhomes for details. | Up to \$1,500; Avg. \$1,000 | Must be verified by an Oregon Department of Energy tax credit-certified technician | Up to \$1,500 based on rated annual savings | Certified by SRCC | 30% of cost |

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| | Requirements | Incentive | Requirements | Tax Credit | Requirements | Tax Credit |
| High-Efficiency Gas Tank Water Heater | EF 0.67, or greater and ENERGY STAR approved. Hybrid systems do not qualify. | \$150 | n/a | | n/a | |
| Gas Tankless Water Heater | EF 0.80, or greater | \$150 | 0.82 EF, or greater | 25% of net purchase price up to \$340 | | |
| Gas Solar Water Heater | System must meet Energy Trust installation requirements. Refer to www.energytrust.org/solarforhomes for details. | Up to \$1,500; Avg. \$700 | Must be verified by an Oregon Department of Energy tax credit-certified technician | Up to \$1,500 based on rated annual savings | Certified by SRCC | 30% of cost |
| Solar Pool Heating | System must meet Energy Trust installation requirements. Refer to www.energytrust.org/solarforhomes for details. | Up to \$1,000; Avg. \$875 | Must be verified by an Oregon Department of Energy tax credit-certified technician | Up to \$1,500 based on rated annual savings | n/a | |
| Solar Electric System | Based on rated capacity of solar panels in watts. System must meet Energy Trust installation requirements. Refer to www.energytrust.org/solarforhomes for details. | Up to \$20,000; Avg. \$5,200 | Minimum 200 watt system; Must be verified by an Oregon Department of Energy tax credit-certified technician | Up to \$6,000 per system (maximum \$1,500 per year) | Certified by SRCC | 30% of cost |

- For details on Oregon state tax credits, call Oregon Department of Energy at 1.800.221.8035 or see: www.oregon.gov/ENERGY/CONS/RES/RETC.shtml
- For details on federal tax credits, see: www.energystar.gov/index.cfm?c=products_pr_tax_credits or www.energytaxincentives.org, or call 1.888.782.7937

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Multiple Measure Incentive Packages

Home Comfort Package

Upgrade all three thermal insulation improvements (attic/ceiling, floor and wall) per Energy Trust specifications and requirements, plus complete air sealing (not less than Minimum Ventilation Level unless approved mechanical ventilation exists) and receive a **\$150 bonus** in addition to Energy Trust incentives. If one thermal insulation upgrade already meets Energy Trust specifications and requirements, then at least two thermal insulation upgrades plus complete air sealing must be installed (per site) to qualify for the Home Comfort Package.

Heat Pump Premium Installation Package

Install any qualifying high-efficiency ducted heat pump upgrade or replacement of an electric furnace with commissioning and duct sealing per Energy Trust guidelines and receive a **\$300 bonus** in addition to Energy Trust incentives.

Windows Bonus Package

Install qualifying windows with a second qualifying improvement** and receive a **\$100 bonus** in addition to Energy Trust incentives.

Home Performance and Solar Assessment Package

Receive a Home Performance with ENERGY STAR assessment and a solar site assessment within a four week period and receive an additional **\$100 incentive** along with the incentive for the Home Performance with ENERGY STAR assessment.

Solar Bonus Package

Install any qualifying solar equipment along with two qualifying energy-efficiency improvements** within six months and receive a **\$400 bonus** in addition to Energy Trust incentives.

Package Bonus Terms & Conditions

- Package upgrades must be installed by an Energy Trust trade ally.
- Package upgrades must be applied for at the same time; all upgrades must be installed within 90 days of the first installed upgrade.
- All incentive packages will receive a higher rate of quality control.

** Qualifying improvements include attic, wall or floor insulation; boiler; heat pump; ductless heat pump; gas tankless water heater; qualifying high-efficiency gas tank water heater (0.67 EF or greater); high-efficiency electric tank water heater (0.94 EF or greater); solar water heat; solar pool heat; solar electric; direct-vent gas fireplace; direct-vent gas unit heaters; and duct or air sealing. Second qualifying improvement for the Windows Bonus must be installed within 90 days of window installation.

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Rules for Self-Installed Upgrades

- The only upgrades that can be installed by the homeowner are: attic insulation, knee wall insulation, floor insulation and electric water heaters.
- Participant must receive pre-approval by calling 1.866.311.1822 before starting work on self-installed attic, knee wall or floor insulation.
- Incentives are only paid for materials, not labor.
- Homeowner-completed projects will be subjected to quality control inspections by Energy Trust to verify that upgrades have been installed according to Energy Trust standards.

Important Existing Homes Terms and Conditions

- Hybrid HVAC incentives are paid for primary heat source only. Backup systems do not qualify for incentives.
- Forms must be submitted within 90 days from initial installation.
- Forms must be complete and accurate for incentives to be paid.
- All required documentation, including contractor invoices marked “paid in full”, must be submitted with the Incentive Application.
- All incentives are paid directly to participants.
- A non-trade ally contractor can install upgrades, but must have a current Oregon Construction Contractors Board (CCB) license.
- Energy Trust reserves the right to modify incentives and financing during the program period.