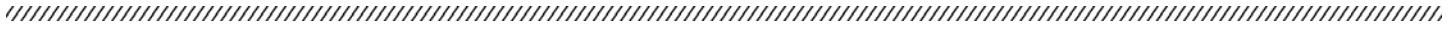


# Early Design Assistance Application

EPS New Construction | Form 685A



Offering	Requirements	Incentive	Energy Trust Use Only
Early Design Assistance	<ul style="list-style-type: none"> <li>Must identify, support and develop opportunities for energy efficiency and/or renewable energy.</li> <li>Project(s) must be sited within Energy Trust service territory (PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista).</li> <li>EPS New Construction staff member must be present at session.</li> </ul>	\$500.00	PT ID Facilitator

**Steps to completion:**

- Be an approved trade ally through Energy Trust of Oregon's EPS New Construction program.
- Complete** and sign application, including:
  - Received program pre-approval for event
  - Summarized event agenda
  - A provided list of attendees
- Submit** completed form and W-9 to  
**Energy Trust of Oregon Residential**  
 100 SW Main Street #1500  
 Portland, OR 97204  
 1.855.575.4315 fax  
[eps@energytrust.org](mailto:eps@energytrust.org)
- Hold** an Early Design Assistance between January 1, 2018 and December 31, 2018.

**Need-to-know information:**

- Please allow up to 60 days for your receipt of payment.
- If a W-9 is required the payment will be made to the name on the W-9.
- Maximum two Early Design Assistance incentives available per company per calendar year.
- Allow two week lead time to schedule Early Design Assistance with appropriate EPS New Construction staff member.

## Applicant Information

Company Name \_\_\_\_\_

Company Contact Name \_\_\_\_\_ Company Contact Title \_\_\_\_\_

Phone  Home  Work  Cell \_\_\_\_\_ Email Address \_\_\_\_\_

## Early Design Assistance (Attach additional sheets if necessary)

List of planned invited attendees, their company name and their role(s) on the project

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Goal(s) of Early Design Assistance

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Early Design Assistance Date	City that projects are located in	Total anticipated number of homes
Utility territory	<input type="checkbox"/> PGE <input type="checkbox"/> Pacific Power <input type="checkbox"/> NW Natural <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Avista	

Summarized event agenda - Anticipated project opportunities for energy-efficiency and/or renewable energy

W-9 Submitted to Energy Trust?  Yes  No

## Acceptance of Terms and Conditions

*By signing this application, I verify that I am authorized to submit this application on behalf of the applicant listed above and that the information presented herein is true and correct. I understand and agree to the requirements and terms and conditions as set forth herein.*



Authorized Representative Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

# Early Design Assistance Application

EPS New Construction | Form 685A



## Terms and Conditions

**APPLICATION:** This **Form 685A** must be filled out completely, truthfully and accurately. Trade Allies are advised to retain a copy of this application and any accompanying documentation submitted to Energy Trust of Oregon, Inc. under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. Incentives are available for Early Design Assistance's held between January 1, 2018 and December 31, 2018. Funds for the Incentives are limited and available on a first-come first-served basis. Application must be submitted within 90 days of Early Design Assistance in order to be eligible for incentives.

**ELIGIBILITY:** Early Design Assistance incentives are available to builders and developers planning housing developments to be sited in the Oregon electric service territories of PGE, Pacific Power, or the Oregon gas service territories of NW Natural, Cascade Natural Gas or Avista. Eligible candidates must be an approved trade ally with the EPS New Construction program.

**RESERVATION OF RIGHTS:** This offer is subject to change and Energy Trust may amend this offer in any way; provided, however, that any such amendment will not affect payment obligations incurred by Energy Trust under this offer for Early Design Assistance funding approved prior to an amendment. Determinations about Early Design Assistance funding eligibility shall be in Energy Trust's sole discretion.

**PAYMENT:** The Incentives will be promptly paid on (i) submission and approval of the completed Early Design Assistance Application, (ii) invoice receipt and (ii) W-9. Payments will be made to the Applicant and must match name on W-9, if W-9 is required. Please allow up to 60 days for receipt of payment.

**INCENTIVE AMOUNT:** Incentive funds are available for any single approved Early Design Assistance event and a maximum of two (2) Early Design Assistance opportunities to a single developer or builder during the offer period.

**INDEMNIFICATION:** Applicant shall indemnify, defend, and hold harmless Energy Trust and Energy Trust, their directors, officers, employees, subcontractors, and agents (altogether, "Indemnified Parties") from any and all claims, demands, suits, losses, or damages, including attorney fees and costs of litigation, which may be incurred by any of the Indemnified Parties in connection with this offer.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed on the Applicant as a result of payment of the 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.

**LIMITATION OF LIABILITY:** Energy Trust's liability in connection with this offer shall be limited to payment of Early Design Assistance incentives in accordance with this offer. Energy Trust shall not be liable for any further amount in connection with this offer, including any special, consequential, punitive, incidental, or indirect damages, whether a claim for such further amount is made in law or equity or under theory of contract, tort, negligence, strict liability, quasi-contract, or other theory.

**NO OBLIGATION:** Energy Trust's commitment to provide Early Design Assistance incentives in accordance with this offer does not in any way imply a commitment by Energy Trust to provide any funding for any further related early design assistances or any other related project or development.

## Resources

Link to W-9

[www.energytrust.org/w9](http://www.energytrust.org/w9)

Additional EPS New Construction Resources

<http://energytrust.org/trade-ally/programs/new-homes/resources/>

## Contact Us

Energy Trust of Oregon EPS New Construction

Email: [eps@energytrust.org](mailto:eps@energytrust.org)

Phone: 1.877.283.0698