

Early Design Assistance Application

EPS New Construction | Form 685A



Offering	Requirements
Early Design Assistance	<ul style="list-style-type: none"> Must identify, support and develop opportunities for energy efficiency and/or renewable energy. Project(s) must be sited within Energy Trust funding utility service territory (Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista). EPS New Construction staff member must be present at session.

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 meeting agenda and notes, including list of attendees
- Submit** completed form and W-9 to
Energy Trust of Oregon
EPS New Construction
 4105 SE International Way
 Suite 505
 Milwaukie, OR 97222

 1.855.575.4315 fax
eps@energytrust.org
- Hold** an Early Design Assistance between January 1, 2021 and December 31, 2021.

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.

Builder Applicant and Site Information

Company Name _____

Company Contact Name _____ Company Contact Title _____

Phone Home Work Cell _____ Email Address _____

Project Address or Subdivision Name _____ City _____ State _____ Zip _____

Early Design Assistance (Attach additional sheets if necessary)

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

Goal(s) of Early Design Assistance

Early Design Assistance Date	Total anticipated number of homes
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Utility territory PGE Pacific Power NW Natural Cascade Natural Gas Avista

Early Design Assistance Incentives (select all that apply)

Incentive description	Incentive amount
<input type="checkbox"/> Standard EDA	\$500
<input type="checkbox"/> Meeting included solar trade ally and focus on solar	\$500
<input type="checkbox"/> Development in rural region (refer to Terms & Conditions)	\$500
<input type="checkbox"/> 20+ homes in development	\$1000
Is this EDA qualifying development for Net Zero incentives?	<input type="checkbox"/> Yes <input type="checkbox"/> No

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.

SIGN HERE

Authorized Representative Name _____ Signature _____ Date _____

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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, 2021 and December 31, 2021. 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 Portland General Electric, Pacific Power, or the Oregon gas service territories of NW Natural, Cascade Natural Gas or Avista or the Washington gas service territories of NW Natural. 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. Oregon builders may complete a maximum of two (2) Early Design Assistance opportunities to a single developer or builder during the offer period. Washington builders may complete a maximum of one (1) Early Design Assistance opportunity to a single developer or builder during the offer period.

RURAL: To qualify for the rural incentive, the housing developments must be sited within Energy Trust Regions 1, 2, 5, 6, 7, 8, 9, 10 or 11, excluding homes within the city limits of Corvallis, Eugene, Springfield, Grants Pass, Roseburg, Medford, Ashland, Hood River, Redmond, Bend, and Klamath Falls.

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
energytrust.org/w9

Additional EPS New Construction Resources
energytrust.org/trade-ally/programs/new-homes/resources/

Contact Us

Energy Trust of Oregon EPS New Construction
Email: eps@energytrust.org
Phone: 1.877.283.0698