

# New Buildings Standard Incentives - NW Natural Washington

## Commercial Buildings | Incentive Application | Form 120P-WA-NB



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TRC is a Program Management Contractor for Energy Trust of Oregon.

**Who can apply:**  
 Incentives are available for qualifying new natural gas energy-saving equipment installed at a commercial, municipal or institutional facility that is a natural gas Commercial Firm or Interruptible Sales customer of NW Natural on Rate Schedule 1, 3, 41 or 42 and located in the State of Washington. Additional requirements apply; see Terms and Conditions for details.

**Steps to completion:**

- 1 Install** an eligible energy efficiency improvement.
- 2 Complete** application information and provide required supporting documentation, including:
  - The applicable measure or equipment tab with the equipment filled out
  - Most current utility bill(s)
  - Manufacturer specification sheet(s)
  - Itemized invoice(s)
  - W-9 for payee
- 3 Submit** form and documentation online, by mail, fax or email to:  
**Energy Trust of Oregon**  
**Existing Buildings**  
 811 SW 6th Ave, Suite 800  
 Portland, OR 97205  
 1.866.605.1676 phone  
 503.243.1154 fax  
[existingbuildings@energytrust.org](mailto:existingbuildings@energytrust.org)
- 4 Receive** your check.  
 Please allow six to eight weeks for incentive processing after completed application and supporting documentation are received.

**What you need-to-know:**

- Energy Trust must receive applications within 90 days from equipment installation.
- All information must be completed for processing; incomplete information may result in delayed payment or disqualification of the incentive.
- If you want to assign your incentive to your trade ally/contractor or other payee, complete the Option to Assign Payment tab.

Program Use Only		v2021.2
Reference ID	PT ID	

Participant Information			
(the "Participant")			
Legal Business Name (must match Participant's submitted W-9)			
Assumed Business Name or DBA			
Contact Name	Title		
Participant Mailing Address	City	State	Zip
Primary Phone	Email Address		
Business Type:	<input type="radio"/> Private Company	<input type="radio"/> Public/government	
Project Role:	<input type="radio"/> Building Owner	<input type="radio"/> Tenant	<input type="radio"/> Property Manager
New Building Project Type			
<input type="checkbox"/> Equipment Upgrade	<input type="checkbox"/> Renovation/Remodel	<input type="checkbox"/> New Construction	

Trade Ally/Contractor/Installer Company Name (if applicable)

Utility Information	
NW Natural Account #:	
Rate Schedule:	

Project and Facility Information			
Site Address	City	State	Zip
Contact name for Site Visit	Phone number for Site Visit		
<small>If requesting incentives for multiple locations, use the Multiple Sites tab (in this Excel workbook) to list each location's site address, utility information, and heating fuel sources</small>			
Project Square Footage	<b>Building Use Type:</b>	<input type="checkbox"/> Assembly <input type="checkbox"/> Auto Service <input type="checkbox"/> College <input type="checkbox"/> Grocery <input type="checkbox"/> Gym/Athletic Club <input type="checkbox"/> Hospital	
Building Square Footage	<input type="checkbox"/> Laundry/Dry Cleaners <input type="checkbox"/> Lodging/ Hotel / Motel <input type="checkbox"/> Manufacturing <input type="checkbox"/> Office <input type="checkbox"/> Parking Structure <input type="checkbox"/> Religious/Spiritual		
Year Built	<input type="checkbox"/> Restaurant <input type="checkbox"/> Retail <input type="checkbox"/> Retirement Home <input type="checkbox"/> Schools K-12 <input type="checkbox"/> Warehouse <input type="checkbox"/> Other:		

<b>Primary Heating Fuel Source</b>	<input type="radio"/> Electric <input type="radio"/> Gas <input type="radio"/> Other
<b>Water Heating Fuel Source</b>	<input type="radio"/> Electric <input type="radio"/> Gas <input type="radio"/> Other

Participant Signature		
<p><input type="checkbox"/> If I am returning this Incentive Application on behalf of Participant on paper, by my signature below, I represent to Energy Trust that (i) I am authorized to enter into this agreement on behalf of the named Participant (ii) I have completed this <b>Form 120P-WA-NB: Incentive Application-New Buildings Standard Incentive - NW Natural Washington</b> completely, truthfully and accurately to the best of my knowledge, (iii) I have read, understand and agree to its Terms and Conditions, and (iv) the energy efficiency equipment installations have been completed to my satisfaction and all accompanying invoice(s) and other supporting documentation are accurate and complete.</p> <p>If I am returning this Incentive Application on behalf of Participant electronically, by entering my name and title below, I represent to Energy Trust that (i) I am authorized to enter into this agreement on behalf of the named Participant (ii) I have completed this <b>Form 120P-WA-NB: Incentive Application-New Buildings Standard Incentive - NW Natural Washington</b> completely, truthfully and accurately to the best of my knowledge, (iii) I have read, understand and agree to its Terms and Conditions, and (iv) the energy efficiency equipment installations have been completed to my satisfaction and all accompanying invoice(s) and other supporting documentation are accurate and complete.</p>		
Authorized Representative Name (printed)	Signature	Date



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## TERMS AND CONDITIONS

**1. APPLICATION:** All required information must be submitted before this application will be processed. **Energy Trust must receive a complete application, with all required accompanying documentation within 90 days of purchased equipment installation in order to qualify for incentives.**

Participant represents that the information and documentation it submits in support of this application shall be complete, truthful and accurate. By submitting this application to Energy Trust, Participant represents that none of the equipment requesting incentives has already received an Energy Trust incentive at the time of purchase. Equipment that has received an Energy Trust incentive via another program offering is not eligible for any additional Energy Trust incentive funding. Participant should retain a copy of this application and any accompanying documentation submitted to Energy Trust. Energy Trust's Existing Buildings Program Management Contractor (PMC) provides services for the Program on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application.

**2. ELIGIBILITY:** Program incentives are available for qualifying, new natural gas energy-saving equipment installed at a commercial, municipal or institutional facility that is a natural gas Commercial Firm or Interruptible Sales customer of NW Natural on Rate Schedule 1, 3, 41, or 42 and located in the State of Washington. Final determination of eligibility for incentives shall rest solely with Energy Trust.

**3. PAYMENT:** Incentives will be paid to Participant (at the mailing address indicated) unless Participant indicates otherwise in the Option to Assign Payment section of this application, following (i) installation of qualifying energy efficient equipment, at the site address(es) listed, in accordance with Program requirements, (ii) submission of this completed application, a complete, accurate and verifiable **IRS Form W-9 (Request for Taxpayer Identification Number and Certification)** for payee, and all required accompanying project cost documentation, and (iii) satisfactory completion of a post-installation verification, if required. Please allow 60 days from Energy Trust's receipt of all information for delivery of payment. Failure to deliver all required documentation may result in a delay or withholding of payment.

**4. PROJECT COST DOCUMENTATION:** Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased and installed. Documentation submitted must show (i) the date of purchase and itemized price paid, (ii) size, type, make, and model or part number of equipment purchased, and (iii) a description of any installation or other labor charges. Documented date of Install must be within one year of equipment purchase date. Certain equipment may require additional documentation as indicated in the energy efficiency specifications. Energy Trust reserves the right to request additional documentation as necessary for it to determine incentive eligibility and payment amount. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the purchase and installation of the specified energy-efficiency equipment (for example, state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration) then Participant is required to notify Energy Trust in writing when submitting the project completion documentation and Energy Trust's incentive will not exceed an amount equal to the total eligible project costs minus such external funds.

**5. INCENTIVES: Funds for incentives are limited and subject to budget availability. Details of the Program, including incentives and other requirements, are subject to change without advance notice.** The total incentive provided (i) will depend upon the incentive amounts in effect, as posted on Energy Trust's website, as of the equipment purchase date, and (ii) will never exceed the total eligible project cost or a maximum of \$75,000. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentive(s) will never exceed the total documented eligible cost of the qualifying equipment or any per site maximums. Incentives paid to any Participant for all applications submitted to Program are limited to a maximum of \$75,000 per site per year.

**6. VERIFICATION:** Equipment installations may be selected for a post-installation verification review. Should Participant's facility be chosen for a post-installation verification of the equipment, satisfactory completion of that verification has to occur before payment is issued. This verification is for the purpose of incentive payment only. No warranty is implied.

**7. TAX LIABILITY:** Energy Trust is not responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. 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.

**8. NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor or product in promoting the Program. The fact that the names of particular manufacturers, contractors, products or systems may appear on this application or elsewhere in the Program does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

**9. ELIGIBLE PRODUCTS:** Products must be new and must meet Energy Trust energy efficiency specifications to qualify. These specifications may be found on the web at <http://energytrust.org/commercial> and are subject to change. If you or your vendor are not sure of the specifications, please call Energy Trust before proceeding.

**10. EQUIPMENT INSTALLATION:** Participant represents that (i) Participant has the right to install the energy saving equipment on the property and site(s) on which the equipment is installed and that any necessary consents have been obtained, and (ii) that all equipment installed and work performed complies with all federal, state, and local safety, building and environmental codes, and any manufacturer instructions.

**11. ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property. Participant agrees to cooperate with evaluation as a requirement of this incentive agreement with Energy Trust. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s), obtaining any and all necessary consents, (ii) requested project documentation related to the installed equipment, and (iii) information about the energy use and operations of the equipment and/or project site(s) for the purposes of evaluating the energy savings during or after project completion. Participant further agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided service to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.

**12. DISCLAIMER / NO LIABILITY:** In connection with some applications, **Energy Trust will provide incentive funding for energy-saving equipment. Participant understands that, while Energy Trust may provide incentives, neither Energy Trust nor the PMC are supervising any work performed for Participant, and neither Energy Trust nor the PMC are responsible in any way for proper completion of that work or proper performance of any equipment purchased. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with the installation of the equipment. Energy Trust does not guarantee any particular energy savings results by its approval of this application, or by any other of its actions.**

**13. GOVERNING LAW:** This agreement shall be exclusively governed by and construed in accordance with the laws of the state of Oregon, without regard to any conflicts of laws rules thereof.

**14. ENERGY INFORMATION RELEASE:** Participant hereby confirms that it has reasonably attempted to identify all of its utility accounts for its identified site(s) in this incentive application. By signing and submitting this incentive application to Energy Trust, Participant authorizes Energy Trust to access its energy usage data for all of Participant's utility accounts for the identified site(s), including those utility accounts identified in this incentive application and any other of Participant's utility accounts that may be associated with such site(s) that Participant is not able to reasonably identify at this time. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information. Participant further authorizes Energy Trust to discuss its energy efficiency efforts with its utility account representative(s).

**15. INFORMATION RELEASE:** Participant agrees that Energy Trust may include some or all of the following information in reports to Bonneville Power Administration, the legislature, the Oregon Public Utility Commission (OPUC), and other government agencies as necessary to meet Energy Trust's responsibilities and regulatory requirements: Participant name, site address, general description of the type of energy saving or renewable project implemented (e.g. lighting, HVAC, solar PV), Energy Trust services or incentive payments provided to the Participant, and any energy saved or generated as a result of Energy Trust services or incentives. Energy Trust will treat all other information gathered as confidential and report it to such agencies only in the aggregate.

**16. SIGNATURES:** Documents transmitted with faxed, scanned or digital signature shall be deemed to be original signatures. At the request of Energy Trust, Participant shall confirm signature by providing an original document.

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**Multiple Sites**

Location (Bldg Name / Store #)	Site Address	City	State	Gas Utility	Gas Account Number	Gas Rate Schedule	Primary Heating Fuel Source	Water Heating Fuel Source
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)
				(select)			(select)	(select)

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**Option to Assign Incentive Payment**

**PLEASE NOTE:** The Energy Trust incentive payment will be made to Participant unless Participant and its designated Payee complete the section below to assign the payment to Payee. An IRS Form W-9 (Request for Taxpayer Identification Number and Certification) for the Payee named below must be attached if this option is selected.

<b>PARTICIPANT AND PAYEE</b>			
Both Participant and Payee understand and agree that if this Option to Assign Incentive Payment is selected the incentive check will be issued to the Payee named below at the address listed below and Energy Trust is not responsible for any tax liabilities that may be associated with the incentive payment. In addition, Participant understands that, notwithstanding this assignment, responsibility for complying with the terms and conditions of this incentive agreement shall continue to be the obligation of Participant, and Energy Trust's sole responsibility under this incentive agreement shall be to Participant. Accordingly, Payee understands that it shall have no rights against Energy Trust or the PMC with respect to such assignment or the payment of the incentive, and in the event that Energy Trust does not pay the incentive as a result of Participant's failure to comply with this agreement, Payee's sole recourse shall be against Participant. Participant directs Energy Trust to pay any incentive to which it is entitled to the Payee named below and waives all rights to directly receive the Energy Trust incentives for the identified energy-efficiency project.			
<b>SIGNATURES:</b> By my signature below, I represent to Energy Trust that I have read this agreement and am duly authorized to sign this Option to Assign Incentive Payment on behalf of the party for whom I am signing.			
<b>On behalf of Participant</b> <i>Authorized Representative</i>	<input type="text"/> <i>(printed)</i>	<input type="text"/> <i>(signature)</i>	<input type="text"/> <i>Date</i>
Participant (Legal business name as shown on W9)	<input type="text"/>		
<b>On behalf of Payee</b> <i>Authorized Representative</i>	<input type="text"/> <i>(printed)</i>	<input type="text"/> <i>(signature)</i>	<input type="text"/> <i>Date</i>
Payee Name (must match submitted IRS Form W-9)	<input type="text"/>		
Mailing Address (for check)	<input type="text"/> Street	<input type="text"/> City	<input type="text"/> State <input type="text"/> Zip
Phone	<input type="text"/>	<input type="radio"/> Cell <input type="radio"/> Office <input type="radio"/> Home	Email <input type="text"/>



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**HVAC and Water Heating**

EQUIPMENT	DESCRIPTION/REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
New Rooftop Unit (RTU) with Demand Control Ventilation (DCV)	<ul style="list-style-type: none"> <li>RTU with Direct Expansion (DX) cooling</li> <li>Serve spaces not required by code to have DCV*</li> <li>Economizer factory-installed by RTU manufacturer, with DCV included</li> <li>Space heated by gas furnace</li> </ul>	\$29 per ton			
	*Describe the space that the RTU will serve: (contact Energy Trust for eligible space types)				
Infrared Radiant Heater	<ul style="list-style-type: none"> <li>Natural gas-fired, low intensity, non-condensing and positive pressure</li> <li>Indoor use only, ≤ 20,000 sq ft</li> </ul>				
	Non-Modulating:	\$5.50 per kBtu/h input			\$ -
	Modulating:	\$7 per kBtu/h input			\$ -
Commercial Tank Water Heater	<ul style="list-style-type: none"> <li>Gas-condensing</li> <li>Tank volume ≥ 10 gallons</li> <li>Heating capacity &gt; 75 kBtu/h</li> <li>Minimum 94% thermal efficiency</li> <li>All building types eligible excluding offices &lt; 5,500 sq ft and commercial</li> </ul>	\$3 per kBtu/h input			\$ -
Commercial Tankless Water Heater < 200 kBtu/h	<ul style="list-style-type: none"> <li>Gas-condensing units must function as central source for domestic hot water (DHW) heating</li> <li>Uniform Energy Factor (UEF) ≥ 0.93</li> <li>Input of &lt; 200 kBtu/h per water heater</li> <li>Additional hot water storage tanks cannot be added</li> <li>Only for coin-operated laundries; restaurants and cafeterias; gym/fitness and aquatic centers; K-12 schools; and motels</li> <li>Installed equipment must be on the AHRI certified product list</li> </ul>	\$165 each			\$ -
	Is there an existing water storage tank attached? <input checked="" type="radio"/> Yes <input type="radio"/> No what is the capacity?				
Commercial Tankless Water Heater/Boiler ≥ 200 kBtu/h	<ul style="list-style-type: none"> <li>Gas-condensing DHW, not used for space heating</li> <li>Integral tank volume &lt; 10 gallons</li> <li>Minimum 92% thermal efficiency</li> <li>Input of ≥ 200 kBtu/h per water heater</li> <li>All building types eligible excluding offices &lt; 5,500 sq ft and commercial gyms without shower facilities</li> </ul>	\$1 per kBtu/h input			\$ -
Commercial Condensing HVAC Boiler	<ul style="list-style-type: none"> <li>Minimum 94% efficiency (either AFUE or thermal efficiency)</li> <li>Load to be served by HVAC boiler must meet the 94% efficiency requirement</li> <li>Redundant, lagging or backup boilers do not qualify</li> <li>Must verify area (sq ft) served by the boiler</li> <li>Boilers used for DHW or pool heating do not qualify</li> <li>Boilers, also known as "heat adders," serving the water loops in water-source heat pump systems do not qualify</li> <li>Boiler system design return temperature must be appropriate to condensing functionality</li> </ul>	\$0.02 per sq ft			\$ -
<b>TOTALS FOR HVAC AND WATER HEATING</b>				<b>TOTAL INCENTIVES</b>	<b>TOTAL INSTALLED COST</b>





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**Grocery**

EQUIPMENT	REQUIREMENTS	INCENTIVE PER UNIT	QUANTITY	INCENTIVE TOTAL	INSTALLED COST
New Cooler Cases with Doors	<ul style="list-style-type: none"> <li>New remote medium temperature display cases with doors when additional cases are added or existing cases are replaced</li> <li>Self-contained condensing unit display cases are not eligible</li> <li>Refurbished cases are not eligible</li> <li>Eligible only for convenience, grocery stores and big box retail with grocery section</li> <li>Gas-heated spaces</li> </ul>				
	Stores < 14,000 sq ft	\$35 per linear ft of door			
	Stores ≥ 14,000 sq feet and < 75,000 sq ft	\$35 per linear ft of door			
	Stores ≥ 75,000 sq ft	\$35 per linear ft of door			

<b>TOTALS FOR LODGING AND FOOD SERVICE</b>	<b>TOTAL INCENTIVES</b>	<b>TOTAL INSTALLED COST</b>