

# Energy Assessment Cost-Share Incentives

Industry and Agriculture | Incentive Application | Form 420<sub>AC</sub>



**To be completed by Assessor**

Energy Trust is making incentives available to provide cost-share funding to help offset **up to 25% of the cost, not to exceed \$3,500**, of an energy assessment or energy audit delivered by a qualified energy assessor under the Oregon Rural and Agricultural Energy Assistance Program (ORAEA), administered by the Oregon Department of Energy (ODOE). Under that program, certain USDA REDA grant funding may be available to help pay for up to 75% of the cost of energy assessment or energy audits for eligible Oregon farms and ranches and rural small businesses.

Energy assessors working with the ORAEA program to provide a qualifying REDA grant-funded energy assessment or energy audit to an Oregon agricultural or rural small business site that receives electric service from Portland General Electric or Pacific Power, or natural gas service under an eligible rate schedule from NW Natural, Cascade Natural Gas or Avista, can apply for this Energy Trust incentive funding. Energy Trust's cost-share incentives are paid directly to the energy assessor to help reduce the remaining 25% (non-federal) cost-share amount owed by an eligible customer recipient.

See below for more information. Contact us at 1-866-202-0576 or [production@energytrust.org](mailto:production@energytrust.org) with questions about this Energy Trust incentive offering or eligibility requirements.

<p><b>Steps to Apply</b></p> <p><b>Submit</b> all of the following within 90 days and the same calendar year of the date of Assessor's energy assessment or energy audit invoice to ODOE for the REDA grant funding portion:</p> <ul style="list-style-type: none"> <li>▪ This completed and signed <b>Form 420AC</b> incentive application; and</li> <li>▪ Copy of Assessor's invoice for the Customer's completed energy assessment or energy audit, matching the cost information submitted in this application. Invoice must clearly show an Energy Trust incentive amount deduction matching the amount being requested by Assessor in this incentive application; and</li> <li>▪ If not already on file with Energy Trust, a completed <b>IRS Form W9</b> for Assessor. Energy Trust's incentives are payable directly to the Assessor.</li> </ul> <p><b>Send to:</b>                  Energy Trust of Oregon — Production Efficiency                  421 SW Oak Street, Suite 300                  Portland, OR 97204  <a href="mailto:production@energytrust.org">production@energytrust.org</a></p>	<p><b>Need-to-know information</b></p> <p>To apply for Energy Trust's Energy Assessment Cost Share incentives, the Assessor applicant must have:</p> <ul style="list-style-type: none"> <li>▪ <b>A signed agreement with ODOE</b> to perform a REDA grant-funded energy assessment or energy audit, through ORAEA, for the named Customer.</li> <li>▪ Confirmed the Customer's agricultural or rural small business site <b>receives electric or natural gas service that meet(s) Energy Trust's eligibility requirements.</b></li> <li>▪ Conducted a <b>qualifying energy assessment or energy audit</b> for the Customer as required by ODOE to receive the 75% REDA grant funding support.</li> <li>▪ <b>Included all required documentation</b> on its invoice to Customer for the completed energy assessment or energy audit, including the full amount of the Energy Trust cost-share incentive amount as a deduction to Customer's invoiced cost.</li> <li>▪ <b>Informed the customer</b> that Energy Trust may contact them to confirm information and discuss additional Energy Trust services or incentive opportunities.</li> </ul>
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## ORAEA Assessor Information

Company Name \_\_\_\_\_ (legal business name)

Payment Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Name \_\_\_\_\_ Contact Email \_\_\_\_\_ Phone \_\_\_\_\_

## Customer Information

Company Name \_\_\_\_\_ (legal business name)

Site Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

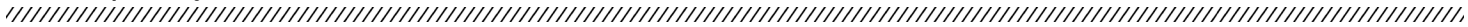
Electric Utility \_\_\_\_\_ Account # \_\_\_\_\_

Gas Utility \_\_\_\_\_ Account # \_\_\_\_\_

## Assessment Information

Date of Energy Assessment/Audit Report Completion (MM/DD/YYYY)	
Actual Total Cost of Energy Assessment/Audit	
ODOE Payment Amount	
Energy Trust Incentive Amount (25% of total audit cost up to \$3,500)	

To be completed by Assessor



**Assessor Signature**

By signing below, I represent that (i) I am authorized to enter into this agreement and have read, understand and agree to its terms and conditions on behalf of the named Assessor, (ii) I have completed this application truthfully and accurately to the best of my knowledge, and (iii) all accompanying invoice(s) and other supporting documentation are accurate and complete.

**Authorized Representative Signature**



\_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

**Additional Terms and Conditions**

- 1. Application.** Energy Trust’s Energy Assessment Cost Share Incentives are intended to benefit customers participating in ODOE’s Rural and Agricultural Energy Assistance Program (ORAEA) to receive a qualifying REDA grant-funded energy efficiency assessment or energy audit (for ease of reference, after this both types are simply referred to as the “Assessment”). To apply for this Energy Trust incentive offering, Assessor’s completed Assessment must fully meet all criteria outlined in the **Need-to-Know** section above, as confirmed by Energy Trust. Assessor agrees to accurately communicate Energy Trust’s Energy Assessment Cost Share Incentive offering to Customer and will be professional at all times at Customer’s site and in communicating with Energy Trust and its representatives. Assessor will inform Customer that Energy Trust may contact Customer to confirm information in this application, the Assessment, or provide information about other Energy Trust services or incentives that may be available to Customer.
- 2. Customer Site Eligibility.** Customer must be participating in the ORAEA program and working with ODOE and Assessor to receive an Assessment. To qualify for this Energy Trust incentive offering, Customer’s participating Oregon agricultural or rural small business site must be receiving electric service from Portland General Electric or Pacific Power, or natural gas service under an eligible rate schedule from NW Natural, Cascade Natural Gas or Avista. Assessor is responsible for reviewing and confirming with Energy Trust that the Customer’s site meets Energy Trust’s incentive eligibility criteria prior to communicating any potential Energy Trust incentive availability to Customer. Contact us before submitting this application if you have any questions about qualifying natural gas rate schedules or other eligibility criteria.
- 3. Energy Trust Incentives.** The Energy Trust incentive paid to Assessor for a qualifying Customer Assessment in connection with this application will not exceed \$3,500 or 25% of the actual cost of the Assessment, whichever is less. Energy Trust’s Energy Assessment Cost Share Incentives for completed, qualifying Assessments are payable to the named Assessor. Assessor understands and agrees that Energy Trust will not provide incentives to Assessor for an ineligible customer site or non-qualifying Assessment and Assessor fully assumes this risk. If Energy Trust does not have a current completed **IRS Form W-9** form on file for Assessor, one must be provided before Assessor can receive Energy Trust incentives. Funding for incentive is limited. Details of this Energy Trust offering, including incentives and other requirements, are subject to change without advance notice. Final determination of eligibility for incentives rests solely with Energy Trust.
- 4. Requesting Incentive Payment.** Applications will be processed on a first-come, first-served basis. To request the Energy Trust incentive payment, Assessor must submit this completed and signed application along with all required invoice documentation outlined in the **Steps to Apply** section above. **Energy Trust must receive all required application documentation within 90 days and within the same calendar year of the date of Assessor’s invoice to ODOE for the 75% REDA grant funding portion of the Assessment.** The Energy Trust incentive payment will be sent to Assessor at the check mailing address indicated in this application. Allow 6-8 weeks for incentive processing. Failure to provide all required documentation may result in delay or withholding of incentive payment.
- 5. Tax Liability.** Energy Trust is not responsible for any tax liability imposed on the Assessor or Customer as a result of the incentive funding. 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.
- 6. Information Release.** Energy Trust may include some or all of the following information in reports or other documentation submitted to the Energy Trust Board of Directors, funding utilities, Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, Oregon Legislature or other state agencies as necessary to meet Energy Trust responsibilities: Assessor and/or Customer name, city or county of business, a description of any Energy Trust services or incentives provided, or any resulting energy-savings or generation. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.
- 7. No Endorsement.** Energy Trust does not endorse any particular manufacturer, contractor or product in promoting its programs. The fact that the names of particular manufacturers, contractors, products or systems may appear on this application or elsewhere in its program offerings does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.
- 8. DISCLAIMER / NO LIABILITY.** The Assessor named in this incentive application is solely responsible for all of its separate contracting arrangements with ODOE and the Customer for any ORAEA participation and/or Assessment funding. Assessor understands and agrees that, while Energy Trust may provide cost-share incentive funding to Assessor in support of Customer’s Assessment as described in this agreement, Energy Trust is not responsible in any way for any Assessment performed or any separate funding arrangements with ODOE or Customer. Energy Trust does not guarantee any particular energy savings results by its approval of the application or by any other of its actions.