

**NEW BUILDINGS  
2008 PARTICIPANT MANUAL**

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**Commissioning Policies and Procedures**

**1. PROGRAM OVERVIEW AND POLICIES**

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**1.1 INTRODUCTION**

The Energy Trust's New Buildings (NB) program provides assistance to building owners, architects, engineers, contractors and others involved in commercial and industrial new construction and major renovation projects. Projects that install energy efficiency measures in their project may be eligible for cash incentives and technical assistance.

In cases where there is a conflict between this manual and an incentive application's terms and conditions, the latter shall take precedence.

**1.2 PROJECT ELIGIBILITY**

**ELIGIBILITY REQUIREMENTS:**

To be eligible to receive incentives from the New Buildings program a project must meet **ALL** of the following criteria:

The project must be served by Portland General Electric or Pacific Power to receive incentives for electric measures and NW Natural or Cascade Natural Gas to receive incentives for gas measures.	<input type="checkbox"/>
The project must pay or plan to pay the public purposes charge.	<input type="checkbox"/>
The project site must be located in Oregon.	<input type="checkbox"/>
The project must be new construction, an addition to an existing structure or a major renovation to an existing structure.	<input type="checkbox"/>
The project must be a commercial, industrial, manufacturing or institutional building.	<input type="checkbox"/>

Eligible building types may include office, retail, health care and hospitals, warehouse or storage, restaurant, manufacturing, grocery, hotels and motels, public and private schools or colleges, mixed-use, high-rise multi-family residential (more than 3 stories) and parking garages.

### **NEW CONSTRUCTION OR MAJOR RENOVATION**

A major renovation of an existing commercial, non-residential structure is defined as the replacement of both lighting and HVAC that serve more than 50% of the total building floor area.

### **SELF-DIRECTING CUSTOMERS**

Under its agreement with the Oregon Public Utilities Commission (OPUC), the Energy Trust receives and invests some of the funds generated by the public purpose charge collected from the customers of PGE and Pacific Power. New Buildings program services are limited and restrictions apply to self-directing customers. Participants can find a complete copy of the Energy Trust's self-direction policy at <http://www.energytrust.org/library/policies/4.10.000.pdf>.

## **2. COMMISSIONING PROGRAM PROCESS AND REQUIREMENTS**

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### **2.1 GENERAL INFORMATION**

The commissioning option offers incentives to commission energy efficiency measures **approved and completed under the Program's Custom Track process**. Commissioning work must meet the standard for New Building Commissioning as outlined in the ASHRAE 2003 Applications Handbook Chapter 42.

#### **FORMS**

The forms used to apply for incentives include:

- **PROJECT ENROLLMENT: FORM 510E**

Your Project Enrollment form simply lets us know that you will be starting a new construction or major renovation project soon, establishes the project's intent to be energy efficient and to utilize New Building incentives, and provides the program with project data and contact information to steer this project through our program. This form does not approve you for any incentive dollars.

- **COMMISSIONING PROJECT INCENTIVE WORKBOOK: FORM 520CX**

The information required in this workbook will assist in determining the estimated amount of the incentive for your project.

- **PROFESSIONAL ENGINEER CERTIFICATION: FORM 540PE.**

This form is the second worksheet in the Commissioning Project Incentive Workbook. It should be submitted with the Completion Document: Form 540D.

- **COMPLETION DOCUMENT: FORM 540D**

This one-page completion document lets the program know that your project is finished and the energy efficient equipment is installed and in working

condition. The completion checklist is also included in the 540D form and details the documentation requirements for the project.

#### **INCENTIVE CALCULATION**

Incentive monies are calculated at \$0.03/kWh and \$0.20/therm for electric or natural gas savings *from eligible Custom Track energy efficiency measures*.

#### **INCENTIVE CAP**

Commissioning incentives are available up to \$40,000 per project.

#### **ELIGIBLE PROJECTS**

Projects that receive incentives for commissioning must meet the following eligibility requirements:

- The project **must have successfully completed a Custom Track project** through the New Buildings program.
- The Custom Project Completion Documentation: Form 540D must have been **approved after January 1, 2006**.

#### **ELIGIBLE MEASURES**

Measures eligible to receive incentives through the commissioning option are electrical and mechanical systems that have variable performance or controls. For example:

- Variable lighting systems with automatic controls;
- HVAC systems and controls;
- Building energy management systems;
- Variable capacity and efficiency performing equipment such as chillers;
- On/off time controls.

#### **INELIGIBLE MEASURES**

Static or fixed energy measures are not eligible for commissioning incentives. These include:

- Building envelope insulation;
- Windows improvements;
- Fixed lighting systems.

#### **COMMISSIONING AUTHORITY**

The Commissioning Authority (CA) must be a Professional Engineer (P.E.) registered in Oregon that has experience with the commissioning process and required documentation. A P.E. seal is required for the Professional Engineer Certification: Form 540PE.

## **2.2 THE 5-STEP PROCESS TO APPLY FOR AND RECEIVE INCENTIVES**

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### **New Buildings Program ♦ Portland Energy Conservation, Inc (PECI)**

1400 SW 5<sup>th</sup> Avenue, Suite 700 ♦ Portland, OR 97201  
Telephone 877-467-0930 ♦ Fax 503-961-7642  
Email [newbuildings@energytrust.org](mailto:newbuildings@energytrust.org)

Below is an outline of the process a Project Owner or Authorized Representative should follow to apply for and receive incentives through the Commissioning option.

**Comment [AR1]:** This has been removed in all other manuals, should it be removed here as well?

<b>Step 1</b>	<b>Participate in the New Buildings program Custom Track and contact the New Buildings program.</b>	<input type="checkbox"/>
<b>Step 2</b>	<p><b>Submit Commissioning Project Incentive Workbook: Form 520CX</b></p> <p><i>This form should be submitted in conjunction with or shortly after the project submits the completion documents for the Custom Track.</i></p> <p><b>Hard Copy Signature Required</b> A hard-copy of the application form with the Building Owner's signature must accompany the electronic version of the form in one of three ways: 1) emailed as a scanned document, 2) faxed, or 3) mailed to the program office.</p>	<input type="checkbox"/>
<b>Step 3</b>	<p><b>Complete the Commissioning process.</b></p> <p>The project must show progress within one year of their application submission and must complete the process within 2 years of the Program's approval date.</p>	<input type="checkbox"/>
<b>THE ELIGIBLE ENERGY MEASURES HAVE NOW FINISHED THE COMMISSIONING PROCESS.</b>		
<b>Step 4</b>	<p><b>Submit a Completion Certification Form.</b></p> <p>The New Buildings Completion Documentation: Form 540D and all supporting documentation must be received by the Program office <u>no later than 60 days</u> after the program-registered completion date. Completion dates may be revised by calling the New Buildings program at 877-467-0930.</p>	<input type="checkbox"/>

**Submit all supporting documentation.**

**Step 5**

- Professional Engineer's Commissioning Certification
- Summary of Commissioning Report that includes the following;
  - Description of systems commissioned;
  - Description of commissioning work performed;
  - Findings of commissioning work;
  - Description of any repairs or resolution of issues found during the commissioning.;
- Copies of completed functional test forms.

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### **3. COMMISSIONING DOCUMENTATION CHECKLIST**

#### **Application or Enrollment into the Program**

You do not need to resubmit the Project Enrollment: Form 510E. Your participation in the Custom Track satisfies the requirements for program enrollment

#### **Workbook Form Checklist**

- Commissioning Project Incentive Workbook: Form 520CX signed by the Project Owner.
- W-9 form. This form is available from the New Buildings program office.

#### **Completion Form Checklist**

- Completion Document: Form 540D signed by the Project Owner
- Professional Engineer's Certification: Form 540PE
- Summary of Commissioning report that includes the following
  - Description of systems that were commissioned;
  - Description of commissioning work performed;
  - Findings of commissioning work;
  - Description of repairs or resolution for any issues found during commissioning.
- Copies of completed functional test forms