

# Design Review

New Buildings Incentive Application Form 520<sub>CX-DR</sub>



## OVERVIEW AND ELIGIBILITY

A signed copy of **Form 510A: Project Enrollment Application** must accompany or precede this form, and only those projects approved for enrollment by the New Buildings program (Program) can apply for incentive funding.

A design review is a critical step in comprehensive commissioning that can help reduce project costs by identifying potential issues before a building is constructed. Design reviews are used by project owners to help inform whether, at the end of certain design milestones, the project appears to be on track to meet the owner's project requirements.

To be eligible for Energy Trust design review incentives, the design review must meet the standards outlined in ASHRAE Guideline 0-2019 and be completed by a Commissioning Authority (CxA) that is either an independent third-party or from the same company as the design firm but is unaffiliated with the building project. In addition, the CxA shall:

- Be a professional engineer (PE) registered in Oregon,

**OR**

- Provide documentation showing they were the CxA on at least two previous projects (projects do not need to have received Energy Trust incentives)

## PROJECT INFORMATION

PROJECT OWNER NAME	COMPANY
BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)
SITE ADDRESS	CITY, STATE, ZIP
EXPECTED CONSTRUCTION COMPLETION DATE	EXPECTED COMPLETION DATE OF DESIGN REVIEW

### Commissioning Authority (CxA)

CONTACT NAME	TITLE	PHONE	EMAIL
FIRM NAME	ADDRESS	CITY, STATE, ZIP	

## STEPS TO PARTICIPATE

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Complete this **Incentive Application** and submit it to the Program, along with the following:
  - A brief (1 page or less) summary outlining the design review activities to be implemented. At a minimum this must include design document review of HVAC systems and controls, lighting and daylighting controls, domestic hot water systems, and renewable energy systems if applicable.
  - An estimate of the total cost and hours required for design review activities identified in the summary
3. Following its review of the application, Energy Trust will notify Project Owner via email of its decision. If the application is approved for an incentive reservation, you will receive written notice. The incentive reservation notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e., the deadline to submit all required documentation to the program).
4. Work with your project team to develop the Owner Project Requirements, Basis of Design, and Commissioning Plan, and have your CxA complete the design review activities at the appropriate times during the design process.
5. Submit a summary of the design review as completed that includes the following:

## RETURN FORM TO: FOR PROGRAM USE ONLY:

Energy Trust of Oregon – New Buildings  
 421 SW Oak Street, #300, Portland, OR 97204  
 1.877.467.0930 **telephone**  
 503.961.7642 **fax**  
 newbuildings@energytrust.org **email**

OM:  
 PT ID:  
 Project ID:

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- Description of the completed design review activities, specifically indicating the stage of the documents in relation to when each identified activity was completed and the time of review completion
  - Findings of design review
  - Description of resolutions for any issues identified during design review
6. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
- Complete, signed **540PR: Payment Request**
  - Project Owner's current W-9 (if not previously submitted)
  - Design review payment documentation (invoice showing final, actual costs paid for CxA's design review activities) and Qualifications of CxA performing the design review (**Form 540PE** if CxA is an Oregon registered PE)

### INCENTIVE CALCULATION

In all cases, the Program will calculate the incentive based on the Program's review of the submitted, final cost documentation for the CxA's eligible, completed design review activities:

- If the project site has eligible electric and natural gas (on a qualifying rate schedule) utility service, or if the project site is an electric-only site (i.e. all site energy provided solely by a participating electric utility, no other site fuel source) eligible for Energy Trust electric incentives, the design review incentive will be calculated as 50% of the actual, eligible design review costs, up to a maximum of \$15,000.
- If the project site is not electric-only and is eligible for Energy Trust electric incentives only, the design review incentive will be calculated as 40% of actual, eligible design review costs, up to a maximum of \$12,000.
- If the project site is on a qualifying rate schedule eligible for Energy Trust natural gas incentives only, the design review incentive will be calculated as 20% of actual, eligible design review costs, up to a maximum of \$3,000.

### SUBMITTAL

By typing or printing my name below, I represent to Energy Trust that (i) I have completed this application completely, truthfully and accurately to the best of my knowledge, (ii) I have read, understand and agree that the terms and conditions contained in this **Incentive Application** are in addition to, and governed by, Project Owner's **Project Enrollment Application** agreement with Energy Trust for the identified project; (iii) I am authorized to enter into this agreement on behalf of the named Project Owner; and (iv) all of the information in the submitted **Project Enrollment Application** agreement remains true and correct as of the date of this submission.

**Submitted By:** (Must be an authorized representative of Project Owner)

\_\_\_\_\_  
SIGNATURE TITLE DATE

\_\_\_\_\_  
FIRM NAME PHONE EMAIL

### FOR MORE INFORMATION

Please visit [energytrust.org/commercial](http://energytrust.org/commercial), call 1.877.467.0930, or email [newbuildings@energytrust.org](mailto:newbuildings@energytrust.org)

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