

Early Design Assistance

New Buildings Incentive Application Form 520_{ED}



OVERVIEW AND ELIGIBILITY

A signed copy of the **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. Early design assistance is provided to help offset some of the costs of holding a collaborative project team meeting, sometimes referred to as a design charette, to discuss energy-related topics with the entire project team.

To apply for an early design assistance incentive, Project Owner must be committed to exceeding applicable Oregon Energy Code requirements for the enrolled project, and the project must be in schematic design or earlier. Project Owners that intend to pursue whole building energy modeling incentives should submit **Part I of Form 520WB** to apply for Early Design Assistance instead of this form. Tenant improvement projects should contact the Program for additional eligibility requirements before submitting this form.

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:
 - Project team meeting agenda
 - List of invited attendees (include each person's role and contact information)
3. Schedule and conduct your project team meeting according to the chart below:

Attendees at Early Design Meeting	
Owner, Architect, Mechanical Engineer, Energy Analyst, Meeting Facilitator	Required
Lighting Designer, General Contractor, Energy Trust Program Rep, Building Operator	Recommended
Solar Trade Ally, Grid-interactive Efficient Building (GEB) Expert(s), Commissioning Agent	If Applicable
Discussion Topics: See Early Design Assistance Agenda and Report Template for detailed, and customizable agenda	

4. Submit a written summary that documents, at a minimum:
 - Project's energy performance goal
 - List of applicable strategies that will be evaluated in the next phase of design
 - How the team plans to address constraints related to energy performance
 - If applicable, all documentation required for any optional bonus incentive discussion topic (see EDA Agenda and Report Template for details)
5. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
 - Complete, signed **Form 540PR: Payment Request**
 - Meeting minutes or report from the project team meeting demonstrating that it met the attendance and discussion topic requirements for the incentives requested
 - Project Owner's current W-9 (if not previously submitted)

INCENTIVE CALCULATION

Subject to the additional requirements outlined below, the standard incentive amount available for early design assistance is shown in the following table:

Offering	Incentive Amount
Assistance for Early Design Meeting	\$2,500
Bonus for Solar Trade Ally Attending (see EDA Agenda and Report Template for required topics)	\$500
Bonus for GEB Expert Attending (See EDA Agenda and Report Template for required topics)	\$500
Bonus for Commissioning Agent Attending (See EDA Agenda and Report Template for required topics)	\$500

If the project is eligible for Energy Trust natural gas incentive funding but does not receive electric service from either Portland General Electric (PGE) or Pacific Power, the incentive available will be one-half the standard incentive amount shown in the table above for the Early Design Meeting and for Commissioning Agent Bonus. Solar Bonus and GEB Bonus incentives are only available to projects served by PGE or Pacific Power.

RETURN FORM TO:

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**

FOR PROGRAM USE ONLY:

OM:
 PT ID:
 Project ID:

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PROJECT INFORMATION

PROJECT OWNER NAME	COMPANY
BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)

Project Team Meeting Details

DATE	TIME	LOCATION
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Facilitator

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

SUBMITTAL

By signing 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.

All Projects: In addition, by submitting this application, I acknowledge and confirm Project Owner's commitment to exceeding applicable Oregon Energy Code requirements for the enrolled project through energy efficiency measures.

Submitted By: Must be an authorized representative of Project Owner.

SIGNATURE	DATE	
NAME	TITLE	COMPANY

FOR MORE INFORMATION

Please visit energytrust.org/commercial, call 1.877.467.0930, or email newbuildings@energytrust.org

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