

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. Energy modeling assistance is provided to help offset some of the costs of creating a whole building energy model to identify energy efficiency opportunities and demonstrate energy savings. Project Owners that do not submit the required subsequent **Form 520MS: Modeled Savings Incentive Application** will not qualify for this incentive.

STEPS TO PARTICIPATE

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Complete this **Energy Modeling Assistance Incentive Application**, including Proposed Energy Analysis Plan section and submit it to the Program.
3. The Program will review the project's energy analysis costs and savings estimates as set forth in the Proposed Energy Analysis Plan. 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 a written notice. The incentive reservation notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to complete the energy model and submit all required completion documentation).
4. Complete the energy analysis as described in the Proposed Energy Analysis Plan.
5. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
 - Complete, signed **Form 540PR: Payment Request**
 - Energy Analysis Report: projects are encouraged to use the **Energy Analysis Report Template**
 - Energy analysis, including all energy model documentation
 - Energy analysis payment documentation (invoice)
 - **Savings Summary Worksheet**
 - A completed **Modeled Savings Incentive Application**
 - Project Owner's current W-9 (if not previously submitted)

INCENTIVE CALCULATION

The actual incentive amount payable by Energy Trust to Project Owner for the energy modeling assistance will not exceed a maximum of \$25,000 and will be determined by Energy Trust based on a review of the project site's electric and natural gas utility service, the energy analysis costs, and the estimated electric and natural gas energy savings as indicated in the Program-approved version of Project Owner's submitted Energy Analysis Report.

For the purpose of this incentive calculation, an "electric-only site" is a site where all of the site's energy is provided solely by PGE or Pacific Power (i.e. site has no gas or other fuel source). The energy modeling assistance incentive will be calculated as follows:

- If the project site has both electric and natural gas (on a qualifying rate schedule) utility service eligible to receive Energy Trust incentives **or** is an electric-only site (see description above), then the incentive will be the higher calculated amount of either:
 - \$0.075 per kWh and \$0.40 per therm based on the program-approved energy savings estimates, or
 - 50% of the eligible energy analysis costs.
- For all other sites, the incentive will be calculated at as \$0.075 per kWh and \$0.40 per therm based on the program-approved energy savings estimates for each eligible utility service.

RETURN FORM TO
Energy Trust of Oregon – New Buildings

100 SW Main Street, #1500, Portland, OR 97204
1.877.467.0930 **telephone** 503.961.7642 **fax**
newbuildings@energytrust.org **email**

For Program Use Only

OM:
Project ID:
PT ID:

Energy Modeling Assistance

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PROJECT INFORMATION

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

Energy Analysis Information

ANALYSIS START DATE		ANALYSIS COMPLETION DATE		NOT-TO-EXCEED COST OF ANALYSIS	
ANALYST NAME	TITLE	PHONE	EMAIL		
FIRM NAME	ADDRESS			CITY, STATE, ZIP	

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/business or call 1.877.467.0930

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PROPOSED ENERGY ANALYSIS PLAN

Please fill out the following sections. You may attach additional information as needed.

Project Description: Briefly describe the type, use and square footage of the facility. Identify whether or not the project is new construction or a major renovation. In the case of a major renovation clearly identify those building components and systems that are part of the renovation, and the extent to which they will be renovated and/or replaced.

Baseline Selection: Identify baseline systems and characteristics (HVAC, service hot water, and/or process loads) for the “code” building (based on the 2014 Oregon Energy Efficiency Specialty Code requirements). See [Technical Guidelines](#) for more information about selecting a baseline.

Proposed Systems: Identify proposed HVAC, service hot water and/or process load systems and characteristics.

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Energy Efficiency Equipment and Systems: List each energy efficiency equipment option or system that will be considered in the Energy Analysis Report. For each item, acknowledge that the specific component is in addition to and/or exceeds the requirements of the 2014 Oregon Energy Efficiency Specialty Code. Identify how each item will yield energy savings. The analyst is encouraged to use the [Savings Summary Worksheet](#) in conjunction with early savings and cost estimates as a decision making tool to help identify the cost-effectiveness of proposed equipment or systems.

Early Gross Estimate of Annual Energy Savings: Identify the following:

- Estimated baseline facility energy consumption (gas and electric)
- Assumptions used in the calculations
- Energy use factors, and their source (i.e. CBECS median electrical intensity)
- Estimate of annual energy savings beyond 2014 Oregon Energy Efficiency Specialty Code for both natural gas and electric

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Description of Analysis: Provide a description of the analysis work that will be performed and the analytical approach that will be used (i.e. spreadsheet calculations, manufacturer calculation tools, simulation model). Include:

- Description of the modeling software and/or manual calculations that will be used to estimate energy savings
- An estimate of the labor hours required for the needed task areas (i.e. baseline model development, proposed model development, spreadsheet calculations, analysis report procurement, etc.)
- The total not-to-exceed cost estimate to perform the energy analysis plan identified herein
- Duration and milestones: the estimated start and end dates for the study as well as all deliverable and milestone dates

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