

OVERVIEW AND ELIGIBILITY

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

With this **Incentive Application**, the Project Owner can request incentive funding to support activities that improve energy performance after occupancy. Funding can be used to support one or more of the following activities: performing functional testing, installing energy metering, and/or achieving zero energy certification. Project Owners must submit this **Incentive Application** no later than 60 days after the Program-documented construction completion date.

Projects pursuing Path to Net Zero incentives must be committed to achieving the Architecture 2030 Challenge targets adopted by the American Institute of Architects (AIA) through energy efficiency and/or renewable strategies. Contact the Program to discuss Path to Net Zero eligibility requirements. Only projects eligible for Path to Net Zero can submit this **Incentive Application**.

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 post-occupancy activities to be implemented
 - An estimate of the total cost and hours required for post-occupancy activities identified in the summary
3. Following its review of the application, Energy Trust will notify Project Owner via email of its decision. If a proposed post-occupancy activity is approved for an incentive reservation, you will receive a written notice. The Energy Trust incentive reservation notice will inform the Project Owner of the incentive reservation period for the Program-approved post-occupancy activity (i.e. the deadline to complete the proposed activity and submit all required completion documentation).

For *each* post-occupancy activity that you wish to receive incentives:

4. Perform the work described in the “Qualifications” section below.
5. Submit the information described in the “Submission Requirements” sections below.
6. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
 - Complete, signed **Payment Request (Form 540PR)**
 - Project Owner’s current W-9 (if not previously submitted)

REQUIREMENTS AND INCENTIVE CALCULATION

Functional Testing

1. **Description:** Once building systems are installed and accessible, functional testing can be performed to help ensure that the systems operate per the design specifications. All functional tests must be documented in the final Commissioning (Cx) report and an issues log must be maintained.
2. **Qualifications:** To qualify for functional testing incentives, project teams must perform functional testing on all primary energy using systems. At a minimum this must include HVAC systems and controls, lighting and daylighting controls, domestic hot water systems, and renewable energy systems (if applicable); additional systems may be considered primary energy using systems for certain building types (e.g. refrigeration system in a grocery store). The functional testing must meet the standards outlined in ASHRAE Guideline 0-2005 and be completed by the Commissioning Authority (CxA) that is either an independent third-party or from the same company as the design firm but unaffiliated with the building project. In addition, the CxA shall:
 - Be a professional engineer registered in Oregon, **or**
 - Provide documentation showing they were the CxA on at least two previous projects
3. **Submission Requirements:** Submit the full Cx Report with an Executive Summary that includes:
 - Description of systems receiving functional testing
 - Description of functional testing work performed

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**

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OM:

Project ID:

PT ID:

- Findings of functional testing
 - Description of repairs or resolutions for any issues found during functional testing
 - Clear indication that all issues impacting building energy performance are resolved
4. **Incentive Calculation:** 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, then an incentive of \$0.15 per square foot up to \$40,000 is available for qualifying projects that perform functional testing on all primary energy-using systems. If the project site is not electric-only and is eligible for Energy Trust electric incentives only, then the maximum functional testing incentive available will be \$0.12 per square foot up to \$32,000; or if the project site is eligible for Energy Trust natural gas incentives only, then the maximum functional testing incentive available will be \$0.03 per square foot up to \$8,000.

Energy Metering

1. **Description:** In high-performance buildings, it is critical that the building operation is monitored, as actual energy performance may differ significantly from what was predicted. Additionally, system-level sub-metering enables building owners and operators to assess the performance of individual systems in order to diagnose operational issues and find areas for improvement.
2. **Qualifications:** To qualify for Energy Metering incentives, at minimum, project teams must install metering equipment for the site that provides whole-building, 15-minute interval data for electricity, one-hour interval data for gas, and one-hour interval for any on-site renewable energy. Projects who install sub-metering equipment will also qualify. Project teams are encouraged to sub-meter the following end uses: HVAC equipment, Lighting systems, Plug loads, Process loads (e.g. data servers and food service equipment).
3. **Submission Requirements:** Submit the following documentation:
 - A list of all metering equipment installed including: systems being metered, metered data type, data collection frequency, make, model, and quantity of metering equipment
 - Product information detailing the capabilities of the metering equipment installed
 - Payment documentation including vendor invoices showing the metering equipment costs and installation labor costs
4. **Incentive Calculation:** 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, then the incentive will be calculated as 50% of the actual costs of the metering equipment and labor, as approved by the Program, up to a maximum of \$20,000. If the project site is not electric-only and is eligible for Energy Trust electric incentives only or if the project site is on a qualifying rate schedule eligible for Energy Trust natural gas incentives only, then the incentive will be calculated as 25% of the actual costs of metering equipment and labor, as approved by the Program, up to a maximum of \$20,000.

Zero Energy Certification

1. **Description:** This incentive supports project teams that attain the International Living Future Institute's (ILFI's) Zero Energy Certification. In order to achieve the Zero Energy Certification, buildings must show 12 months of consecutive zero energy performance data. For more information on eligibility and steps on how to apply for the Zero Energy Certification, visit <http://living-future.org/netzero>.
2. **Qualifications:** To qualify for this incentive, the project team must complete all steps to apply for and achieve ILFI's Zero Energy Certification.
3. **Submission Requirements:** Submit the following documentation:
 - Copies of the project documentation submitted to ILFI for Zero Energy Certification, which may include:
 - a. Completed Energy Usage Table with monthly information gathered from tracking systems that clearly record energy consumed and produced
 - b. Energy bills for a continuous 12-month period

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Post Occupancy for Path to Net Zero

New Buildings Incentive Application | 520^{PO-PTNZ}

- c. Photographs of energy consuming and energy producing systems
 - d. Narrative describing the renewable energy system(s) and major components, their function, and location(s)
- Documentation showing ILFI's final notice of approval of the Zero Energy Certification
 - Payment documentation showing the paid Zero Energy Certification registration and certification fees
- 4. Incentive Calculation:** The incentive amount available for qualifying projects that apply for and achieve Zero Energy Certification, as approved by the Program, is \$2,000.

PROJECT INFORMATION

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

Commissioning Authority (CxA) for Functional Testing (if applicable)

CONTACT 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.

Path to Net Zero Projects: In addition, by submitting this application, I acknowledge and confirm the Project Owner's commitment to achieving the Architecture 2030 Challenge targets adopted by the American Institute of Architects (AIA) through energy efficiency and/or renewable strategies.

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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