

OVERVIEW AND ELIGIBILITY

A signed copy of the **Project 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.

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**.

With this **Incentive Application**, Project Owner can request incentive funding to support enhanced design work to identify unique or aggressive energy saving opportunities and/or create a whole building energy model for a Path to Net Zero project. Technical Assistance for Path to Net Zero projects may encompass one or more studies, such as:

- Early design shoebox modeling
- Computational fluid dynamics (CFD)/Bulk airflow analysis
- Daylighting studies
- Building energy modeling
- Commissioning design review
- Additional studies as approved by the Program

To qualify for incentives, the scope of the additional design work for each proposed study must be acceptable to the Program. Eligibility for Technical Assistance for Path to Net Zero incentive funding is determined solely by Energy Trust.

STEPS TO PARTICIPATE

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Complete this **Incentive Application** and submit to the Program, along with the following documentation for one or more of the proposed studies. If multiple studies are proposed in connection with this Incentive Application, each one will be individually reviewed for incentive eligibility purposes. Please note that if the project site is eligible and served by only one participating utility (electric or natural gas), any proposed study must be relevant to that energy source.
3. For *each* proposed study, submit:
 - 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.
 - Description of Analysis:
 - Provide the name and contact information for the firm that will perform the analysis, 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).
 - 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 technical assistance plan identified herein
 - Duration and milestones: the estimated start and end dates for the study as well as all deliverable and milestone dates

And, if the proposed study will address building energy modeling, also include:

- Baseline Selection
 - Identify baseline systems and characteristics for the “code” building (based on the 2014 Oregon Energy Efficiency Specialty Code requirements).
 - See **Technical Guidelines** for more information about selecting a baseline.

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:

- Proposed Systems
 - Identify proposed HVAC, service hot water and/or process load systems and characteristics that vary from the baseline selection.
 - Discuss process or other loads that are expected to vary from the baseline assumptions.
 - Energy Efficiency Equipment and/or Systems:
 - List each energy efficiency equipment option or system that will be considered in the proposed study.
 - For each item, acknowledge that the specific equipment 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
 - 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
4. The Program will review each study proposal submitted in connection with this Incentive Application and notify Project Owner via email of its decision. If a proposed study is approved for an incentive reservation, you will receive a written notice. The Energy Trust incentive reservation notice will inform Project Owner of the estimated incentive reservation period for that study (i.e. the deadline to complete the study and submit all required completion documentation).
 5. Complete the study as proposed.
 6. To request payment for a study in connection with this Incentive Application, submit the following to the Program, before the established incentive reservation deadline for that study, for verification:
 - Complete, signed **Payment Request (Form 540PR)**
 - Technical assistance study analysis report. Reports can be in any form. For building energy modeling, projects are encouraged to use the **Energy Analysis Report Template**
 - Model or other analysis files, including all supporting documentation
 - Technical assistance study payment documentation (invoice)
 - **Savings Summary Worksheet** (if applicable)
 - Project Owner's current W-9 (if not previously submitted)

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, incentives will be calculated per study as 75% of actual eligible study costs, as approved by the Program, up to a maximum total **Technical Assistance for Path to Net Zero** incentive for all studies combined of \$50,000.

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, the proposed study must be relevant to the building systems served by the applicable participating utility (electric or natural gas) and incentives will be calculated per study as 50% of actual eligible study costs, as approved by the Program, up to a maximum total **Technical Assistance for Path to Net Zero** incentive for all studies combined of \$25,000.

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Technical Assistance for Path to Net Zero

New Buildings I Incentive Application | 520_{TA-PTNZ}



PROJECT INFORMATION

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

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/commercial or call 1.877.467.0930

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