

# Special Measure Calculation

## New Buildings | Incentive Application | Form 520SM



### 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. Any equipment which, either separately or as part of a project, has or will receive an incentive from any other Energy Trust offering is ineligible. With this **Incentive Application**, Project Owner can request incentive funding for an energy efficiency measure that requires a custom calculation to demonstrate potential energy savings. The Program may elect to develop the custom energy savings calculation or accept an energy savings calculation from Project Owner. If Project Owner is submitting this **Form 520SM** associated with a Market Solutions incentive application, then the Program will review submitted documentation for elective qualification purposes **only**; in such case, Project Owner's submitted Market Solutions incentive application governs and the Steps to Participate and Incentive Calculation information listed here do not apply.

Incentives are provided for energy efficiency savings resulting from the installation of eligible equipment and measures exceeding the 2014 Oregon Energy Efficiency Specialty Code or the 2019 Oregon Zero Energy Ready Commercial Code. To be eligible for incentives, measures must pass the Program's cost-effectiveness test.

### 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. Upon an initial review, the Program will determine whether the custom measure calculation will be completed by the Program or by Project Owner and will request all necessary information.
3. Provide all requested information to the Program for completing the custom measure calculation.
4. Once the calculation is complete and if approved by the Program, Project Owner will receive an incentive reservation notice from the Program. This notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to submit all required completion documentation.)
5. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
  - Complete and signed **Form 540PR: Payment Request**
  - Product data sheets, equipment schedules, or design drawings, as requested by the Program
  - Payment documentation, such as vendor invoices showing make, model, and quantity purchased
  - Project Owner's current W-9 (if not previously submitted)

If Project Owner submits other applications to the Program for installation incentives for this project, the request will be combined into one installation incentive reservation and, upon completion, Project Owner can submit a single **Payment Request** with all required accompanying documentation.

### INCENTIVE CALCULATION

Incentives are based on the estimated annual energy savings of the installed equipment and subject to Program per-project installation incentive caps. Incentives are calculated as follows:

- Electric incentives are calculated at \$0.20 per kWh, not to exceed 100% of incremental cost.
- Gas incentives are calculated at \$0.85 per therm, not to exceed 100% of incremental cost.

### PROJECT INFORMATION

<b>Project Owner Name</b>	<b>Company</b>
<input type="text"/>	<input type="text"/>
<b>Building/Project Name</b>	<b>Project ID (if known)</b>
<input type="text"/>	<input type="text"/>
<b>Expected Construction Completion Date</b>	
<input type="text"/>	

**RETURN FORM TO**  
Business Energy Solutions – New Buildings  
100 SW Main Street, #1500, Portland, OR 97204  
1.877.467.0930 **telephone** 503.961.7642 **fax**  
[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only  
OM:  
Project ID:  
PT ID:

# Special Measure Calculation

New Buildings | Incentive Application | Form 520SM



Please describe the building (*size, type, location, operating hours*)

---

### ENERGY ANALYST (*if applicable*)

Analyst Name	Title	Phone	Email

Firm Name	Address	City, State Zip

---

### ENERGY MEASURE INFORMATION

**Please describe the measure.** Include the source of energy savings, efficiency rating or typical energy use of the technology being investigated, and a brief overview of how the technology saves energy (example: moving heat is more efficient than generating heat). Attach relevant cutsheets or building plans.

**Please provide a base case.** What would you compare this equipment to?

**Provide any available savings estimate.** Can be from manufacturer's websites, industry websites, etc. Note source(s).

**What is the expected measure life?**

**RETURN FORM TO**  
Business Energy Solutions – New Buildings  
100 SW Main Street, #1500, Portland, OR 97204  
1.877.467.0930 **telephone** 503.961.7642 **fax**  
[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only  
OM:  
Project ID:  
PT ID:

# Special Measure Calculation

## New Buildings I Incentive Application I Form 520SM



**Provide the installed and incremental costs.** You can provide the cost as published (no calculations needed); can be from manufacturer's websites, industry websites, etc. If easily available, note the incremental cost above the baseline technology. Note source(s).

**Provide the labor costs for installation (if published).** Detailed estimated not required. Note source(s).

**List any rebate or incentives from sources other than Energy Trust of for this equipment.** Include known or easily found sources; not intended to be an exhaustive search.

### 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](http://energytrust.org/business) or call 1.877.467.0930

**RETURN FORM TO**  
Business Energy Solutions – New Buildings  
100 SW Main Street, #1500, Portland, OR 97204  
1.877.467.0930 **telephone** 503.961.7642 **fax**  
[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only  
OM:  
Project ID:  
PT ID: