

# Project Enrollment

Solar Program | Project Enrollment Application | Form 210A



To be completed by Trade Ally or Project Owner

## Description and Purpose of this Form

Energy Trust makes project development assistance incentive funds available to help assist with early phase project development activities for qualifying new solar projects that will benefit Pacific Power and Portland General Electric (PGE) ratepayers in the State of Oregon.

This *Project Enrollment Application (Form 210A)* must be completed and submitted to the Solar program (Program) for processing before you begin project development activities. Project Owners pursuing multiple projects must submit a *Project Enrollment Application* form for each proposed project. To enroll your proposed project in the Program so that you can seek Energy Trust incentives, the *Project Enrollment Application* must be completed, signed, and submitted to the Program by an authorized representative of the Project Owner identified below.

## Project Owner

Legal Company Name (must match W-9)

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Owner Representative \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

## Primary Contact (if different from Project Owner)

Contact Name \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Company Name \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Project Information

Project name \_\_\_\_\_

Site Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Project Description:

Please provide us with a description of the proposed project, including information about the customer or project site that might be pertinent. If you have any completed any relevant studies or other helpful information, please attach them.

### Project Team Summary

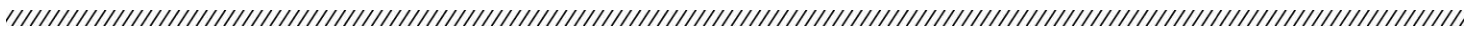
Please provide us with a list of any additional project team members who are actively working and engaging to develop the proposed project and the role that each is playing. Project owner authorizes Energy Trust to discuss and otherwise release information about this project with its designated project team members below, and as may be updated by the Project Owner from time to time.

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Project Questionnaire	
Electric utility serving site address:	<input type="checkbox"/> Portland General Electric <input type="checkbox"/> Pacific Power
Project type:	<input type="checkbox"/> New Construction <input type="checkbox"/> Existing Building <input type="checkbox"/> Expansion to existing solar project
Building owner: <input type="checkbox"/> Private <input type="checkbox"/> Public/Government <input type="checkbox"/> Nonprofit	Building ownership type: <input type="checkbox"/> Rented/Leased <input type="checkbox"/> Owner Occupied
Does the Project Owner plan to apply for Energy Trust solar incentives? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is Project Owner applying for or receiving any state/federal funding, grants, discounts, rebates, or incentives towards this project? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does this project serve low-income customers?: <input type="checkbox"/> Yes <input type="checkbox"/> No      If yes, describe:	

Property Type(s) Choose all that apply			
<input type="checkbox"/> Assembly/Community	<input type="checkbox"/> Assisted Living	<input type="checkbox"/> Auto Services	<input type="checkbox"/> Brewing/Winery
<input type="checkbox"/> College/University	<input type="checkbox"/> Data Center	<input type="checkbox"/> Grocery	<input type="checkbox"/> Gym/Athletic Club
<input type="checkbox"/> Hospital/Health	<input type="checkbox"/> Other Health	<input type="checkbox"/> Infrastructure	<input type="checkbox"/> Institutional/Government
<input type="checkbox"/> K-12 School	<input type="checkbox"/> Lodging/Hotel/Motel	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Multifamily Property
<input type="checkbox"/> Multifamily- Mixed Use	<input type="checkbox"/> Office	<input type="checkbox"/> Office- Mixed Use	<input type="checkbox"/> Parking Structure/Garage
<input type="checkbox"/> Restaurant	<input type="checkbox"/> Retail	<input type="checkbox"/> Retail- Mixed Use	<input type="checkbox"/> Warehouse/Distribution
<input type="checkbox"/> Other			

## Project Enrollment and Incentive Application Process

- ENROLLMENT:** Complete and submit this *Project Enrollment Application (Form 210A)* to Energy Trust at solar@energytrust.org. The Program will review the application for basic eligibility requirements and may contact you for additional information. Energy Trust will notify you of approval or denial of project enrollment via email.
- INCENTIVE APPLICATION(S):** If approved for enrollment you can request Energy Trust incentives by completing and submitting the *Incentive Application(s)* that correspond to qualifying activities. You must submit the most current version available at the time of submittal. Each Incentive Application may contain additional requirements and terms and conditions that apply to that particular Incentive Application.
- INCENTIVE RESERVATION:** Energy Trust will notify you of approval or denial of your specific request(s) via email. If a request is approved, the email will include the estimated incentive amount and incentive reservation expiration date.
- COMPLETION:** Complete the required activity before the incentive reservation expiration date and submit all required completion documentation to request the incentive payment.

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## Terms and Conditions

**1. Applying for Incentives.** To apply for incentives for specific project development activities for an enrolled project, Project Owner must submit a completed and signed **Incentive Application** with all required accompanying documentation to Energy Trust for review. Any additional terms and conditions included in the **Incentive Application** are incorporated in this agreement by this reference. If a specific project development activity is approved for an incentive reservation, Energy Trust will notify Project Owner of the estimated incentive amount reserved and the incentive reservation expiration date in writing. Approval or denial of a specific activity for incentive reservation rests solely with Energy Trust. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust. Project Owner is advised to retain a copy of all materials submitted to Energy Trust.

**2. Incentives.** Funds for incentives are limited and available on a first-come first-served basis. Energy Trust's program requirements and incentives are subject to change without prior notice and may vary by utility service area, depending on the pace of demand in each utility territory and the available incentive budget. Incentive amounts paid may vary from amounts reserved depending on the project activity's final documented, eligible costs.

**3. Incentive Reservations.** Energy Trust's incentive reservation will automatically expire as of the incentive reservation expiration date indicated; any request for an extension beyond such date must be submitted to Energy Trust in writing and in advance for review and consideration. Energy Trust retains the right to withdraw an incentive reservation at any point during the reservation period if we determine that Project Owner is not progressing appropriately and in good faith to perform timely completion of project development activity work. Funds that have been reserved for a specific activity are not transferable to other projects or activities. If requested, Project Owner will provide Energy Trust with documentation to show that an activity is moving forward on a timely basis. Energy Trust may modify or cancel an incentive reservation or enrollment, if (i) the project is no longer consistent with the project description as submitted by Project Owner and reviewed by Energy Trust for eligibility and enrollment purposes hereunder, (ii) an activity is no longer consistent with a pre-approved Request for Funding, or (iii) progress towards project activity completion is unreasonably prolonged during the incentive reservation or enrollment period. Determination of eligibility for Energy Trust incentives or appropriate progress rests solely with Energy Trust.

**4. Activity Completion; Documentation Required for Payment.** Project Owner is solely responsible for ensuring that its project development activity work complies with all federal, state, local and utility specifications and requirements. Energy Trust's payment of any reserved incentives under this agreement is conditioned upon the enrolled Project Owner providing Energy Trust with all documentation listed in the instructions for payment, which are included with the Energy Trust email approving an incentive reservation. Please allow 45 days from Energy Trust's receipt of all required information for incentive payment processing. Failure to provide all required information may result in delay or withholding of payment.

**5. Repayment of Energy Trust Incentives.** To be eligible for Energy Trust incentive funding, a project must either be located in PGE or Pacific Power service territory or planning to sell power to one of those utilities. By submitting this project for enrollment, Project Owner is representing that the resulting project's generated energy will be delivered to either PGE or Pacific Power. If, after receiving an Energy Trust incentive under this agreement, Project Owner moves forward with its renewable energy project, but does not offset or deliver energy for the benefit of the Oregon customers of PGE or Pacific Power, Energy Trust may require Project Owner to repay all or a portion of the Energy Trust incentive funds provided. In addition, if the Project Owner sells the deliverables supported by the project development assistance incentives (e.g. study results and other information) to a third party within three years of receiving that assistance, Energy Trust may require repayment of all or a portion of the project development assistance funds.

**6. Use of Information; Information Release.** In connection with Energy Trust's review of Project Owner's potential renewable energy project ONLY, Project Owner agrees that Energy Trust may reproduce, distribute, or otherwise use the project information collected or prepared as part of this application or any activity approved for an incentive reservation in a submitted **Incentive Application**. Project Owner understands and agrees that such a review by Energy Trust may include certain authorized consultants that have signed confidentiality agreements with Energy Trust. Project Owner agrees that Energy Trust may include some of all of the following information in reports or other documentation submitted to Energy Trust's Board of Directors, the Oregon Public Utility Commission (OPUC), the Oregon Legislature, Bonneville Power Administration, the Oregon Department of Energy, Oregon Housing and Community Services, or other state agencies as necessary to meet Energy Trust's responsibilities: Project Owner's name and city/county location (non-residential only), a general description of the project development assistance and proposed renewable energy project, the amount of any Energy Trust services or incentive payments provided to Project Owner, and any resulting energy savings or generation. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate. Project Owner agrees and acknowledges that Energy Trust may use and distribute information gathered and provided in any reports, spreadsheets, or other documentation resulting from the project development activity work for which incentive funding is provided, so long as any such information is aggregated and/or anonymized.

**7. Self Direction Status.** The project development incentive funding provided under this agreement is subject to Energy Trust's self-direction policy. Self-direction status affects eligibility for Energy Trust services and incentives. Energy Trust's self-direct policy and a copy of our Frequently Asked Questions Regarding Self Direction are available for review on our website at [www.energytrust.org](http://www.energytrust.org). Contact us with any questions before submitting this form. By submitting this **Incentive Application**, Project Owner represents and



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## Submittal

By my signature below, I represent to Energy Trust that (i) the information contained herein is complete, truthful and accurate to the best of my knowledge, (ii) I am authorized to sign this agreement on behalf of the named Project Owner, and (iii) I have read, understand and agree to the terms and conditions of this agreement on behalf of Project Owner.

**Submitted By:** (Must be an authorized representative of Project Owner)

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**Signature** **Date**

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**Name** **Title** **Company**

## FOR MORE INFORMATION

Please visit [www.energytrust.org/solar](http://www.energytrust.org/solar) or call 1.866.368.7878