

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. Projects seeking LEED® incentives from the Program cannot apply for this incentive. If you are interested in installing energy efficient equipment not included on the accompanying Small Retail Incentive Workbook, please contact the Program for eligibility.

This is a packaged offering open to retail buildings less than 70,000 square feet pursuing energy efficiency levels above 2014 Oregon Code. This Incentive Application applies only to projects permitted under the 2014 Oregon Energy Efficiency Specialty Code. The incentives are centered on the choice of HVAC system and lighting design, with additional incentives available by selecting elective options. Equipment or measures that have or will receive Energy Trust incentives through another offering are not eligible for this incentive.

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. For detailed requirements, refer to the **Small Retail Incentive Workbook**.
3. 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 submit all required documentation to the Program).
4. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
 - Complete, signed **Payment Request (Form 540PR)**
 - Completed **Small Retail Incentive Workbook** (using version in effect at date of incentive reservation or later)
 - Product data sheets, plans, and schedules demonstrating equipment compliance (see **Small Retail Incentive Workbook**)
 - Payment documentation (suppliers or contractors can send the copies of the invoices directly to the Program)
 - A site verification visit may be required by the Program prior to final payment
 - Project Owner's current W-9 (if not previously submitted)

INCENTIVE CALCULATION

The incentive is calculated based on square footage. The efficiency of your installed HVAC equipment will determine what level of incentives your project qualifies for. You may then select additional elective equipment and systems to qualify for increased incentives. See **Small Retail Incentive Workbook** for details about what systems meet each level requirement.

Small Retail Incentives (per sq. ft.)		
Good	Code compliant packaged single zone (PSZ) or split system heat pump, or AC Unit with gas heat	\$0.20
	15% reduction in lighting power density (LPD)	
	1-2 non-lighting electives	
Better	High efficiency PSZ or split system heat pump, or AC Unit with gas heat with economizers & demand controlled ventilation (DCV)	\$0.30
	15% reduction in LPD	
Best	"Better" requirements + variable frequency drive (VFD) on supply fan	\$0.50

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:
FT ID:

Electives <ul style="list-style-type: none"> • High-performance windows • Condensing furnace • Demand controlled ventilation (for "Good" tier only) • Standard equipment (commercial dishwashers, refrigeration equipment, ice machines, others as applicable) • Special Measures 	Incentive See Small Retail Incentive Workbook for incentives associated with each option
Higher-Efficiency Interior Lighting <ul style="list-style-type: none"> • Total 25% LPD reduction • Total 35% LPD reduction • Total 45% LPD reduction • Total 55% LPD reduction 	Incentive \$0.10/sq ft \$0.20/sq ft \$0.30/sq ft \$0.40/sq ft

PROJECT INFORMATION

PROJECT OWNER NAME	COMPANY
BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)

EXPECTED CONSTRUCTION COMPLETION DATE	PROJECT SIZE (SQ. FT.)
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Please select your incentive package level: Good Better Best	Number of electives that will be added: One Two Three Four +	Based on the equipment you have selected in the Small Retail Workbook, please enter your estimated incentive:	\$
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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)

Name	Title	Date
Firm Name	Phone	Email

FOR MORE INFORMATION

Please visit energytrust.org/business or call 1.877.467.0930

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