

# Solar Development Assistance

Solar Program I Incentive Application I Form 220<sub>SDA</sub>



To be completed by Trade Ally

## Section 1: Overview and Eligibility

Energy Trust's Solar Development Assistance incentive offering provides project development incentive funds to help eligible project owners reduce their costs to engage an approved [Solar Electric Trade Ally](#) to prepare a qualifying feasibility study to help analyze their proposed solar electric project. Projects proposed for solar feasibility assistance under Energy Trust's New Buildings Solar Ready offering (*Form 520SF*) or Energy Trust's Solar Plus Storage offering (*Form 220SF*), are not eligible to apply for this Solar Development Assistance incentive.

Please review the following eligibility criteria to apply for this incentive:

- a. A signed copy of Project Owner's (as named in Section 4 below) **Project Enrollment Application** (*Form 210A*) must accompany or precede this form, and only those projects approved for enrollment by Energy Trust's Solar program can apply for this Solar Development Assistance incentive funding
- b. Project Owner must be a public entity, non-profit entity, or non-residential customer that will perform the role of either system owner or host for a proposed solar electric system site served by Portland General Electric or Pacific Power
- c. If Project Owner is a not a public or non-profit entity, then Project Owner must be planning to pursue a (PGE or Pacific Power) utility grant program for the proposed solar electric system at the non-residential customer site to be eligible to submit this application
- d. The proposed solar electric system project studied must be capable of meeting Energy Trust's [Solar Electric Installation Requirements](#)
- e. Trade Ally must submit this **Incentive Application** (*Form 220SDA*) to Energy Trust for review and consideration *before beginning* any of the work on the feasibility study. Study activities cannot already be underway and the proposed system must be at a point in the design phase where there is still opportunity to make changes
- f. Project Owner's Solar Electric Trade Ally contractor must deliver a qualifying Feasibility Study, meeting all of the requirements outlined in this **Incentive Application**, by the deadline indicated in the incentive reservation letter (see **Section 3, Step 3** below)

## Section 2: Incentive Calculation

This Solar Development Assistance incentive will be calculated as 90 percent of the Solar Electric Trade Ally's total, final eligible, invoiced costs to develop and deliver a qualifying Feasibility Study, up to a maximum amount of **\$1,800**. The actual incentive amount payable may vary from reserved estimates and will be determined by Energy Trust based on review of Project Owner's submitted Feasibility Study completion documentation and actual costs.

## Section 3: Steps to Participate

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Confirm eligibility and submit this **Incentive Application** (*Form 220SDA*) to Energy Trust's Solar program for review and approval, along with a copy of your Solar Electric Trade Ally contractor's pricing agreement to conduct the proposed Feasibility Study.
3. After reviewing your application, Energy Trust will notify Project Owner and its Solar Electric Trade Ally contractor by email. If your submitted application is APPROVED for an incentive reservation, Energy Trust's emailed notice will inform you of the Solar Development Assistance incentive reservation period and the reserved Solar Development Assistance incentive amount. If the application is DENIED, then Energy Trust has determined that we are NOT able to provide incentive support as requested. Please contact us if you have questions.
4. Complete and submit a Feasibility Study for the proposed project, consisting of all of the following documentation, to Energy Trust for review and comment within the incentive reservation period. The Study must be prepared by an approved Solar Electric Trade Ally in coordination with Project Owner. At a minimum, the completed Feasibility Study must include:
  - System Design Documents including, at a minimum:
    - o Solar Resource Assessment - sun chart or a report from an approved solar resource assessment tool showing the performance impact of shading and non-ideal tilt and orientation
    - o Electrical schematic diagram - detailed system design drawing that accurately depicts all planned electrical components, plus main service panel and utility connection. Include module series/parallel wiring, conductor and ground wire types and sizing, length of wire runs, conduit types and sizing, AC & DC breaker sizing and voltage drop calculations. Schematic diagram will include a detailed schedule of system components.

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- Physical layout diagram - physical layout map that accurately depicts the locations of installed modules and inverter(s), location of all applicable electrical panels and meters, roof or installation site layout, pre-existing renewable energy systems, and the location where the lowest TSRF measurement was taken
  - System Proposal Document(s) that include, at a minimum:
    - Executive summary - including a description of key findings, description of how and when the solar analysis was conducted, description of Project Owner's motivation for pursuing the project, and an anticipated timeline for project completion.
    - Financial summary - estimated cost, including any estimated tax credits, accelerated depreciation, grants, and potential Energy Trust incentives, as may be applicable to the proposed system installation. Include one or more of the following financial metrics over a 10-30 year basis: simple payback, modified internal rate of return, net present value, savings to investment ratio or return on investment.
    - A brief outline of any design, permitting, zoning, structural, electrical, or interconnection considerations that may affect the potential system design, project timeline or installation cost.
    - Additional documentation –provide copies of any associated documentation including structural engineering report, roof life assessment, permit application, utility interconnection application, etc. including unlocked versions of any underlying models, spreadsheets or other analysis created or prepared as part of or in support of the Feasibility Study
  - Final Feasibility Study Invoice and Payment Documentation – provide a copy of Solar Electric Trade Ally contractor's final invoice(s) itemizing the final, total Feasibility Study costs, subtracting the anticipated Energy Trust Solar Development Assistance incentive, and identifying the remaining net, or out of pocket, cost paid to Solar Electric Trade Ally by Project Owner.
5. Energy Trust's Solar Development Assistance incentive funds will be paid directly to Project Owner's Solar Electric Trade Ally upon completion of Project Owner's qualifying Feasibility Study.

### Section 4: Project Owner

Legal Company Name (must match W-9)

Mailing Address City State Zip

Owner Representative Title Phone Email

Address City State Zip

### Section 5: Solar Electric Trade Ally (Required)

Contact Name Title Phone Email

Company Name

Mailing Address City State Zip

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## Section 6: Project Information

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

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

Anticipated Time to Complete the Feasibility Study: \_\_\_\_\_

### Grants the project will be applying to receive (check all that apply):

- Portland General Electric RDF Grant
- Pacific Power Blue Sky Grant
- USDA REAP Grant
- ODOE RED Grant
- Other: \_\_\_\_\_

## Additional Terms and Conditions

Project Owner understands and agrees:

- All **Terms and Conditions** as set forth in Project Owner's submitted **Project Enrollment Application** agreement (Form 210A) are hereby fully incorporated by reference into this **Incentive Application** (Form 220SDA).
- While Energy Trust may provide incentive funding to Project Owner's contracted Solar Electric Trade Ally to assist Project Owner with the development of a qualifying Feasibility Study, Energy Trust is not performing or supervising the Feasibility Study work. Energy Trust does not provide legal, financial, tax, or investment advice. Nothing in the Feasibility Study process constitutes any representation by Energy Trust as to whether or not you should install solar. Any decisions regarding the feasibility, selection, design, installation, use or operation of any potential solar electric system is the sole responsibility of Project Owner should perform its own independent reviews of any and all Feasibility Study information and consult your own technical, legal, financial, tax, investment and other professionals to determine what is best for Project Owner's needs.

## Submittal

By signing below, I represent to Energy Trust that (i) all of the information in Project Owner's submitted **Project Enrollment Application** agreement remains true and correct as of the date of this **Incentive Application** submission, (ii) all information as set forth in this **Incentive Application** is true and correct to the best of my knowledge, and (iii) Project Owner has read and understands the terms and conditions of this **Incentive Application** agreement, including without limitation the incorporated terms and conditions of Project Owner's governing Project Enrollment Application agreement. Project Owner further understands that approval or denial of this application for project development assistance incentives rests solely with Energy Trust.

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

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