

Development Assistance Incentives

Solar I Request for Funding I Form 230_{RF}



To be completed by Project Proponent

Submission Instructions: A completed, signed **Form 210CS: Project Enrollment** must precede this **Form 230RF: Request for Funding**. Only projects approved for enrollment are eligible for **Form 230RF** review. All terms and conditions of Project Proponent's approved **Form 210CS** for this project apply to and are hereby incorporated into this **Form 230RF**.

To be considered for project development assistance incentives, this **Form 230RF** must be submitted to Energy Trust for review and consideration *before* Project Proponent begins any of the work on any activity that is the subject of the request. Energy Trust may request additional information or documentation. Approval or denial of a specific activity for incentive reservation rests solely with Energy Trust. Final determination of eligibility for and payment of Energy Trust incentives rests solely with Energy Trust.

Eligible Community Solar Development Activities: Energy Trust may provide funding for certain activities that Energy Trust and the Project Proponent determine are necessary to develop the project as an Oregon Community Solar Project. Project Proponent may request development assistance incentives for work to be performed by a third-party consultant and, if Project Proponent is a public or nonprofit entity, work performed by the Project Proponent. Project development activities eligible for development assistance incentives include, but are not limited to:

Grant-writing: Completing grant applications for non-Energy Trust project funding opportunities.

Technical assistance: Performing work or engaging a consultant to provide expert assistance with technical development activities, such as: preliminary system design, assistance with permitting, utility interconnection, contract development, accounting and tax treatment, project management, customer acquisition and management planning, and product (subscription) development.

Feasibility work: Assessing the technical and financial feasibility of the project. Feasibility studies commonly include or consist of solar resource assessment; financial modeling and analysis; siting options; design, permitting, zoning, structural and interconnection considerations; engineering studies; development timeline; assessment of equipment options; assessment of the market potential for subscribers/owners; and additional conclusions and recommendations.

Activities *ineligible* for community solar development assistance include, but are not limited to:

- Purchase or lease of equipment, facilities, land or resources, or investment in a physical asset
- Permit or interconnection fees
- Oregon Community Solar Program fees
- Closing costs or other costs involved with finalizing a deal with an investor
- Construction or site prep costs
- Activities already started or completed

Incentives for approved activities are calculated and paid on a reimbursement basis following Energy Trust's review of submitted final completion documentation. Project Proponent is responsible for paying its consultant(s) in full. The maximum total amount of development assistance incentives that Energy Trust will provide to a project for all approved development activities will not exceed the caps shown in the table below. In addition, the maximum total amount of development assistance incentives that Energy Trust will provide to a single Project Proponent working on multiple projects is \$50,000.

Incentives for *public/nonprofit* applicants

Party performing the work	Incentive covers	Total Incentive Cap	
		≤ 360 kW _{AC}	> 360 kW _{AC}
Third-party contractor or consultant	80% of eligible costs	\$5,000	\$10,000
Nonprofit or public Project Proponent	80% of eligible costs	\$5,000	\$10,000
Maximum total development assistance incentives per project		\$10,000	\$20,000

Incentives for *private, for-profit* applicants

Party performing the work	Incentive covers	Total Incentive Cap
		≤ 360 kW _{AC}
Third-party contractor or consultant	50% of eligible costs	\$5,000
Maximum total development assistance incentives per project		\$5,000

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Project Information			
Project Proponent Legal Business Name		Project Name	
<i>(must match Project Proponent's enrollment agreement)</i>			

Development Assistance Activity Description

Provide a detailed description of the proposal/scope of work for which you are requesting development assistance. Include expected deliverables, how this work fits into the overall project development process, and how it is important to the overall progress of the project. Describe the key information or accomplishments expected to result from each activity and what you next step will be following the completion of this work. You may attach additional pages, as necessary.

Provide a budget for the scope of work and an explanation of how costs were calculated. If the request includes multiple activities, please break out the cost of each activity individually. If the work will be performed by the Project Proponent, include an estimate for the time the activity will take and the cost, as an hourly rate, for the staff that will perform the work. Please note any other outside funding sources supporting this work. You may attach additional pages, as necessary.

If work will be performed by a third party, please provide the business name and qualifications of the third-party independent consultant(s) who will perform work, unless the consultants' qualifications were submitted with a previous request. You may attach additional pages, as necessary.

If work will be performed by a non-profit or public entity Project Proponent, please provide the name and qualifications of the individuals who will be performing the work. You may attach additional pages, as necessary.

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Activity List				
List the activities for which you are requesting funding, their projected start and end date, what the final deliverable will be, a cost estimate and an estimate of the incentive you are requesting, based on the incentive caps shown on page 1. Each activity you are requesting funding for should be listed separately and any ineligible activities or costs should be excluded from your cost estimate. You may use this table or attach your own, using a similar format. The language in <i>italicized text</i> is an example and can be deleted.				
Activity Description	Estimated Start and End Date	Final Completion Documentation*	Cost Estimate	Incentive Request
<i>Feasibility study performed by XYZ consultant on resource potential.</i>	<i>11/21/2019-12/31/2019</i>	<i>Copy of final feasibility study prepared by consultant XYZ</i>	<i>\$10,000</i>	<i>\$8,000</i>
TOTAL			\$10,000	\$8,000

* **Final Completion Documentation** should reference electronic copies of applicable items to be provided by Project Proponent as proof of activity completion, such as:

- Grant writing:** proof that a grant was submitted, such as an acknowledgement from the funded that the application was received or a copy of the submitted grant application
- Feasibility:** a completed feasibility study with any underlying models, spreadsheets, studies or analysis and a summary of the next steps the Project intends to take. Products such as engineering studies, development timelines or market assessments.
- Technical assistance:** A summary memo from the party that completed the work reporting on the results of the work performed, including next steps and recommendations or lessons learned. Final products such as completed permit(s), interconnection documents or agreements, design and engineering documents, marketing plans, etc.

Project Proponent agrees to provide any additional final completion documentation as may be requested by Energy Trust for it to complete its review.

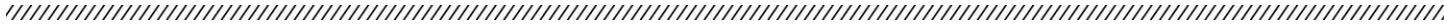
Signature	
By signing below, I represent to Energy Trust that (i) I have completed this Request for Funding completely, truthfully and accurately to the best of my knowledge, (ii) I have read, understand and agree that any terms and conditions contained herein are in addition to, and governed by, Project Proponent's Project Enrollment Application agreement with Energy Trust for the identified project; and (iii) I am authorized to enter into this agreement on behalf of the Project Proponent. Project Proponent further agrees that all information provided to Energy Trust in its Project Enrollment Application agreement remains truthful and correct as of the date of this submission.	
SIGNATURE:	DATE:
PRINT NAME AND TITLE:	

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Next Steps:

- Submit this completed this **Form 230RF: Request for Funding** to Energy Trust at solar@energytrust.org.
- Energy Trust will review your requests for funding and notify you of approval or denial of your specific request(s) for eligibility for payment via email. That notice will include a list of activities that have been approved as eligible, as shown in the Notice of Denial or Approval table, below. Unless a specified activity has been identified as approved as eligible by Energy Trust in the Notice, then such request is DENIED as ineligible for payment. If DENIED, then Energy Trust has determined that we are NOT able to provide incentive support for the project development assistance as requested. Determination of eligibility for payment is not a promise of payment by Energy Trust. Energy Trust will provide payment only upon its determination, in its sole discretion, that the eligible activity has been completed and the Project Proponent has submitted all required completion documentation.
- Complete your project development activity by the incentive Reservation Expiration Date indicated on the Notice of Denial or Approval.
 - If you need an extension to complete an activity, submit a request to Energy Trust by email **before** the Incentive Reservation Expiration Date. Unless an extension request is approved by Energy Trust in advance, the reservation will expire and the incentive funds will be released for other projects.

To Request Payment:

- To request payment, submit all of the required completion documentation electronically to Energy Trust at solar@energytrust.org. The documentation must include:
 - All required completion documentation for the specified activity, including Final Completion Documentation and any other required documentation requested by Energy Trust for a specified activity, identified by approved Activity #; and
 - A legible copy of an itemized invoice(s) for the development activity work. If the work was performed by the Project Proponent, the invoice must show, for each approved activity, the staff person who performed the work, their hours and hourly rate.
- Energy Trust reserves the right to request, and Project Proponent agrees to provide, any additional backup documentation requested by Energy Trust. By submitting the completion documentation to request payment, Project Proponent is certifying to Energy Trust that the project development assistance work has been completed consistent with the Energy Trust-approved **Request for Funding** and the information provided is true and correct.

Notice of Denial or Approval
To be completed by Energy Trust and emailed to the Project Proponent

Energy Trust has reviewed this **Request for Funding** and approves as eligible for incentive payment the activities specifically listed below. If an activity is not listed then that request is DENIED. If you have submitted previous incentive reservation requests, these will also be listed below *in italicized text*.

The amount of incentives approved for reservation by Energy Trust may differ from the amount requested. If, at any time during the development activity work, the scope, schedule or cost changes from that presented to Energy Trust in the approved **Request for Funding**, you must notify Energy Trust and we may require you to submit a revised **Request for Funding** or other documentation. The incentive reservation for an activity will expire and be void as the Reservation Expiration Date.

If you have any questions, please contact us at solar@energytrust.org.

Approved Activity #	Approved Activity	Reserved Incentive Amount	Reservation Expiration Date
ACTIVITY #			
ACTIVITY #			
ACTIVITY #			
TOTAL INCENTIVE RESERVATION AMOUNT			