

# Small-Scale Community Solar Custom Incentive

Solar | Preliminary Reservation Application | Form 290CS



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## Application for Oregon Community Solar Projects seeking Energy Trust of Oregon's Portland General Electric or Pacific Power Custom Incentive Funds.

This custom incentive offering for Oregon Community Solar Project Managers is to allocate limited incentive dollars for smaller community solar projects that have specific goals to serve customers that traditionally are underrepresented in public processes and programs to incent the installations of solar electric projects. Energy Trust has limited incentive funds available for this offering, and some projects may not be funded.

Selected projects will receive a 6-month preliminary reservation for a custom incentive amount. During that time, the Project Manager will be required to complete key progress milestones, including obtaining Pre-certification with the Oregon Community Solar Program, engaging an Energy Trust Solar trade ally contractor, completing the technical design, and submitting a complete Energy Trust incentive application package for an eligible community solar system.

Project Managers that successfully complete all progress milestones by the 6-month expiration date, as confirmed by Energy Trust, would then receive a custom incentive reservation, for up to two years, to complete their Energy Trust verified project installation and Oregon Community Solar Program certification.

### Who Should Apply?

Project Managers registered with the Oregon Community Solar Program who are developing small-scale (<360 kW-ac) community solar projects that will serve customers of Portland General Electric or Pacific Power. Proposed projects must additionally satisfy specific equity goals, see the Eligibility Criteria below for additional details.

### Amount of Funding Available:

\$1,200,000 is available to allocate for Portland General Electric projects.

\$500,000 is available to allocate for Pacific Power projects.

### Application Deadline:

Applications must be received via email at [solar@energytrust.org](mailto:solar@energytrust.org) by **5:00 pm on July 16, 2021 July 26, 2021** to be considered.

### Instructions:

#### *Step 1 – Complete this Form 290CS*

Interested Community Solar Project Managers should complete, sign and submit this **Form 290CS Small-Scale Community Solar Custom Incentive Preliminary Reservation Application** with the required supplemental documentation. Completed **Form 290CS** requests are due to Energy Trust by the Application Deadline listed above. Project Managers may submit one application per project for one or more project(s), subject to the incentive limits described below in the Eligibility Criteria.

#### *Step 2 – Eligibility Screening*

Energy Trust, in its sole discretion, will conduct an initial screening process to determine if a proposed project meets Energy Trust's eligibility criteria as set forth below:

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Eligibility Criteria	
Project type	Project intends to be certified with the Oregon Community Solar Program and serve the customers of Portland General Electric or Pacific Power.
Aggregate project capacity	Aggregate project capacity is at least 25 kW <sub>AC</sub> and less than (but not equal to) 360 kW <sub>AC</sub> .
Requested incentive	Incentive request per project is no more than: <ul style="list-style-type: none"> <li>• \$400,000 for a project that serves Portland General Electric customers <i>or</i></li> <li>• \$250,000 for a project that serves Pacific Power customers.</li> </ul>
Maximum total incentive per Project Manager for this solicitation	Project Manager's incentive requests, in aggregate, are no more than: <ul style="list-style-type: none"> <li>• \$600,000 for projects that serve Portland General Electric customers <i>and</i></li> <li>• \$250,000 for projects that serve Pacific Power customers.</li> </ul>
Customer outreach plan and equity goals	<p>Customer outreach plan contains specific goals to significantly serve customers traditionally underrepresented in public processes and programs to incent and advance solar energy installations. Specifically, to demonstrate this commitment, the project will satisfy at least one of the following options:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Eligibility Option 1: 50% or more of the project will be reserved for low-income customers (&lt;80% State Median Income).</li> <li><input type="checkbox"/> Eligibility Option 2: Project Manager is, or has partnered with, an eligible Project Proponent to develop an outreach plan for this project to enroll customers traditionally underrepresented in public processes and programs to incent and advance solar energy installations. Project Proponent is a one of the following:                             <ul style="list-style-type: none"> <li>○ <b>Tribe</b> <i>One of the nine federally recognized tribes of Oregon</i></li> <li>○ <b>Eligible Nonprofit Organization</b> <i>A 501(c)(3) nonprofit organization that (i) is registered with the Oregon Secretary of State, Corporation Division, (ii) is not identified on the Oregon Department of Justice list of "Disqualified Charities," and (iii) has a stated mission and track record of delivering programs directly benefiting communities and individuals including, but not limited to, Black, Indigenous, and other communities of color, communities experiencing lower incomes, federally recognized Indian tribes, rural communities, coastal communities, communities with limited infrastructure, and other communities and individuals traditionally underrepresented in public processes and programs to incent and advance solar energy installations</i></li> </ul> </li> </ul> <p>Application includes a signed <b>letter of support</b> from the Project Proponent documenting the outreach plan partnership.</p>
Project development schedule	Development schedule demonstrates that, if selected, Project Manager is capable of obtaining Pre-certification with the Community Solar Program and completing other key progress milestones within 6 months and completing installation within 2.5 years of project selection.

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Eligibility Criteria	
Above market cost	<p>Cash flow model demonstrates the total incentive request is no more than the project's above-market cost. Project financial model includes other sources of incentive or grant funding and tax benefits, uses reasonable cost assumptions and targets a rate of return of no more than 8%.</p> <p><i>Above-market cost is the difference between the financial value of the power produced by a proposed project and the projected cost to produce the power from the proposed project including a reasonable rate of return. If the cost to produce the power is less than the value received by selling the power, then there are no above-market costs.</i></p>
Trade ally and installation	<p>Has committed to, if selected, engaging an Energy Trust Solar trade ally to install the project and otherwise meeting applicable standards detailed in Energy Trust's <a href="#">Solar Electric Installaton Requirements</a>.</p>

### Step 3 – Project Ranking

Eligible projects will be ranked based on their Total Incentive Request from lowest to highest request. Starting with the top-ranked (lowest total incentive) request and continuing in order of ranking, Energy Trust will select as many projects as can be supported, with the available funding for this offering, by utility. Selected projects will receive a preliminary reservation notice.

Energy Trust expects that available funding may allow it to select at least three top-ranked projects serving Portland General Electric customers and two top-ranked projects serving Pacific Power customers. Additional projects may be supported through this process, as funds allow. If there are insufficient remaining funds to cover the next incentive request in the ranking, Energy Trust may at its discretion offer a partial incentive, allocate more funds to this solicitation or reallocate those funds to support other renewable energy projects.

If there is a tie between two incentive requests, the project with the larger aggregate capacity (in kW<sub>AC</sub>) will be ranked higher. If two or more projects have the same total incentive request and aggregate capacity, Energy Trust will perform a qualitative review of each project schedule and customer outreach plan (see Sections 4 and 5, below). The project that is deemed to have made the most progress toward successful commercial operation and customer enrollment will be ranked higher.

### Step 4 – Notification of Selections

**By August 31, 2021**, Energy Trust will publish a ranked list, on its website at [www.energytrust.org/community-solar/](http://www.energytrust.org/community-solar/), of the selected projects, by utility, with the following information: Project Name, Project Manager Name, Location (City), Aggregate Project Capacity, and Total Incentive Request.

Project Managers with selected projects will additionally receive a written notification from Energy Trust detailing specific preliminary reservation requirements (see Step 5, below).

Projects that are not selected will be notified in writing on an individual basis. Energy Trust will not publish any information about these project applications to its website.

### Step 5 – Preliminary Reservation

Selected projects will receive a **Preliminary Reservation Notice** from Energy Trust, along with a **Form 220CS Small-Scale Community Solar Incentive Agreement** with instructions explaining how to complete and submit the form online through PowerClerk.

The notice will include key progress milestones that Project Manager will need to accomplish before the stated 6-month deadline in order to obtain a two-year incentive reservation from Energy Trust, including:

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- Engaging an Energy Trust Solar trade ally
- Completing Project Pre-Certification with the Oregon Community Solar Program
- Developing system design documentation, as required in the [Solar Electric Installation Requirements](#)
- Submitting a **Form 220CS** through PowerClerk

If a Project Manager fails to complete all of the progress milestones by the 6-month preliminary reservation deadline, Energy Trust may choose to select another project from the ranked list or reallocate the incentive funds. Energy Trust will consider extension requests submitted in writing prior to the preliminary reservation deadline.

## Step 6 – Incentive Reservation

Project Managers that successfully complete all required progress milestones, including submittal of a complete **Form 220CS** incentive agreement for a selected project by the 6-month preliminary reservation deadline, would then receive a two-year custom incentive reservation to complete a verified system in accordance with the terms of the **Form 220CS** incentive agreement.

Energy Trust incentive funding is subject to availability and may change.

## How to apply:

Complete this **Form 290CS** incentive application with all required supplemental documents, in PDF, Word or Excel format. Submit the completed, signed application via email (scanned signatures are acceptable) at [solar@energytrust.org](mailto:solar@energytrust.org).

**Applications must be received by 5:00 p.m. on July 16, 2024 July 26, 2021.**

Section 1. Project Manager and Contact Information							
Project Manager Legal Business Name							
Project Manager Business Entity Type		<input type="checkbox"/> Nonprofit/public <input type="checkbox"/> Private/for-profit		Telephone		<input type="checkbox"/> office <input type="checkbox"/> mobile	
Primary Contact Name				Primary Contact Title			
Primary Contact Email				<i>This email will be used for notification of project status.</i>			
Mailing Address				City		State	Zip

Section 2. Project Summary									
Project Name						Proposed operating date			
Site Address or Coordinates				City			State	Zip	
<i>For multiple sites, write "multiple" and attach a list.</i>									
Has a Trade Ally installer been selected for this project?						<input type="checkbox"/> No <input type="checkbox"/> Yes.		Utility <input type="checkbox"/> PGE <input type="checkbox"/> Pacific Power	

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Project Size (<360 kW <sub>AC</sub> )	kW <sub>AC</sub>	kW <sub>DC</sub>
Trade Ally:		
<p><i>Please review the Eligibility Criteria, above, and select the eligibility option that qualifies this project:</i></p> <p><input type="checkbox"/> Eligibility Option 1:     % (50% or more) of the project will be reserved for low-income customers.</p> <p><input type="checkbox"/> Eligibility Option 2: Project Manager is, or has partnered with, an eligible Project Proponent. <i>Complete Section 3, below.</i></p>		

Section 3. Project Proponent and Contact Information			
<p><i>Complete this section if Eligibility Option 2 is selected in Section 2, above. For Eligibility Option 1, skip this section.</i></p> <p>Attach a <b>Letter of Support</b> from the Project Proponent on letterhead and signed by an authorized representative. The letter should state the Project Proponent's commitment to the project and describe how the project will benefit underrepresented customers.</p>			
Project Proponent Name			
Project Proponent Entity Type	<input type="checkbox"/> Tribe <input type="checkbox"/> Eligible nonprofit	Telephone	<input type="checkbox"/> office <input type="checkbox"/> mobile
Primary Contact Name	Primary Contact Email		
Primary Contact Title			
Mailing Address	City	State	Zip

Section 4. Customer Outreach Plan
<p>Attach a <b>Customer Outreach Plan</b>. The plan should include:</p> <ul style="list-style-type: none"> <li><b>Why this project?</b> Provide a description of the project, including information about the choice of location, whether you plan to sell subscriptions or ownership shares in the project, the types of participants you plan to recruit and the reasons or motivations for developing this project.</li> <li><b>What's your goal?</b> Provide specific goals or targets (e.g. X% or X kW of the project, X number of participants, X% savings) you have for serving and/or deeply benefiting customers traditionally underrepresented in public processes and programs to incent and advance solar energy installations.</li> <li><b>Who will implement the plan?</b> Provide a description of the team that will be working to find and enroll customers. What are the roles of the Project Manager, the Project Proponent (if applicable) or other allied organizations in providing outreach? What qualifications or experience does the team have to engage with customers and meet project goals?</li> <li><b>What do you plan to do?</b> Provide a description and timeline of planned or completed activities that will help you find and enroll customers and meet project goals.</li> </ul>

Section 5. Project Development Schedule

Attach a Project Development Schedule showing that the project can meet the requirements outlined in this Form 290CS. Provide a detailed project schedule, including:

- Trade Ally selected and engaged
Community Solar Program Pre-certification and Certification
Interconnection studies, if required, and interconnection agreement
Lease or other site control agreement
Construction agreements
System design
Permitting
Equipment procurement
Site preparation
System installation
Commissioning
Customer sales and enrollment milestones

Section 6. Incentive Request and Financial Details

Total Incentive Request will be rounded to the nearest dollar and must be less than the limits described in the Eligibility Criteria, above. \$

Attach a Financial Model that demonstrates the total incentive request is no more than the project's above-market cost (see definition in Eligibility Criteria, above) and targets a rate of return of no more than 8%. Include descriptions of project ownership, financing and/or subscription structure, as needed to clarify the model. The model should show project cash flow over time and include, in as much detail as is available, estimates of:

- Total incentive request from Energy Trust
Energy Trust Community Solar Development Assistance funds
Other grants or incentives, including tax benefits
Project capital costs
Interconnection costs, if known (or an estimated range)
Customer outreach and participant enrollment costs
Ongoing operations and maintenance costs
Ongoing participant management costs
Participant subscription or purchase revenue
Utility bill credits generated for participants

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## Section 7. Terms and Conditions

### No Commitment

This application does not constitute an offer to provide any incentive or to enter into a contract with the Energy Trust, nor does it commit Energy Trust to enter into a contract or similar undertaking with the Project Manager or any organization associated with the Project Manager. Energy Trust reserves the right to suspend or modify this application process or to issue a new process or application that would supersede and replace this one.

Any commencement of discussion or negotiations in connection with this application does not signify a commitment by Energy Trust to provide incentive funding, execute a contract or to continue discussions with respect to the Project Manager. Any party involved in these discussions or negotiations can terminate contact at any time and for any reason. Energy Trust is under no obligation to pursue this application, or to disclose to the Project Manager any information concerning its disposition of, or action on, the application. Any recommendations or conclusions from this incentive application process concerning the Project Manager shall not constitute a right (property or otherwise). No binding obligation shall be created unless Energy Trust or its representative and the concerned parties execute a binding *Form 220CS* incentive agreement. Any awards made by the Energy Trust as a result of this application will be subject to the terms of a definitive written agreement between the parties.

### Confidentiality

Submitted applications may be reviewed by any Energy Trust employee, Board member, or contractor. If Energy Trust uses an outside party to help review the application, it will require that party to sign a confidentiality agreement. Subject to litigation or other legal disclosure requirements, Energy Trust will not otherwise disclose information submitted in this application except for that limited information which Project Manager provides written authorization to Energy Trust to release.

### Information Release

Project Manager understands that Energy Trust intends to publicly disclose, including without limitation publication to its website, a ranked list of projects selected as a result of this process. By its submittal of this application, Project Manager expressly agrees that, if this application is selected for a preliminary incentive reservation, Energy Trust is authorized to disclose the following information: Project Name, Project Manager Name, Aggregate Project Capacity, Utility, Location (City) and the amount of the Total Incentive Request for the Project.

### Waiver of Claims

Project Manager waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust, Energy Trust's Board of Directors, Energy Trust's Renewable Advisory Council, Energy Trust's agents, employees, or contractors with respect to any matter arising out of any process associated with this application.

### Costs

All costs associated with completing this application are the sole responsibility of Project Manager and that this application and all materials submitted with it shall become the property of Energy Trust and shall not be returned to the Project Manager.

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## Section 8. Project Manager Certification and Signature

I hereby certify that:

1. Project Manager is duly authorized to submit this application and the undersigned is authorized by the Project Manager to submit this application to Energy Trust on Project Manager's behalf;
2. The information provided by Project Manager in this application, and any other related documents delivered to Energy Trust, is true, accurate and complete to the best of Project Manager's knowledge;
3. Project Manager has read, understands and agrees to all of the terms and conditions as set forth in this application;
4. Project Manager understands and accepts that the approval or rejection of this application is within the sole discretion of Energy Trust;
5. Project Manager understands and accepts that all costs associated with completing this application are the sole responsibility of Project Manager and that the application and all materials submitted with it shall become the property of Energy Trust and shall not be returned to the Project Manager;
6. Project Manager authorizes Energy Trust to contact references and to investigate the business financial credit history of the Project Manager, its affiliates, and all associated partners, principals and management and authorizes the release of all said information to Energy Trust;
7. Project Manager has included in this application all information necessary to ensure that the statements herein do not in whole or in part mislead Energy Trust as to any material fact; and
8. Project Manager will report immediately in writing to Energy Trust any changes to the information contained herein at any time while this application is under consideration.

Project Manager  
Name

*(printed)*

Signature

Date

Authorized  
Representative

*(printed)*

Title