

# Whole Buildings and Path to Net Zero

New Buildings | Multi-Incentive Application | Form 520WB-2019



## OVERVIEW AND ELIGIBILITY

A signed copy of **Form 510A: Project Enrollment Application** must accompany or precede this form, and only those projects approved for enrollment by the New Buildings program (Program) can apply for incentive funding. The Energy Trust incentives available for an enrolled project via this **Form 520WB-2019** cannot be combined with any other Energy Trust incentives.

To submit an **Incentive Application** using this **Form 520WB-2019**, the enrolled project must meet Program eligibility requirements, plus the additional criteria listed below, as of the **Incentive Application** submittal date:

- Be permitted under the 2019 Oregon Energy Efficiency Specialty Code.
- Develop and submit a whole building energy model which meets Program requirements. See Part One below for details.
- Commit to achieving at least 5% savings over the code-minimum performance; and
- Identify a target Energy Use Intensity (EUI), appropriate to the building. See [Technical Guidelines](#) for instructions on setting an EUI target. Projects with an EUI target that meets or exceeds Architecture 2030 Challenge for 2020 guidelines (energy consumption performance standard of 80% below the regional average/median for that building type) may be eligible for the Program's higher Path to Net Zero installation incentive rates. See Part Two below for additional information.

## STEPS TO PARTICIPATE

This **Form 520WB-2019** contains three separate **Incentive Applications** (Part One, Part Two, and Part Three) that Project Owner can complete and submit to the Program, as the project progresses. Submit the relevant **Incentive Application**, along with all required submission documentation listed. Program requirements and incentives are subject to change.

Each **Incentive Application** will be reviewed independently by the Program to determine whether that specific **Incentive Application** qualifies for an incentive reservation subject to Program requirements and incentives in effect for this offering as of the submittal date. Determination of eligibility for Energy Trust incentives rests solely with Energy Trust. If approved for an incentive reservation, the Program will notify Project Owner via an e-mailed incentive reservation notice. See the [Project Enrollment](#) for additional details

To request payment in connection with an **Incentive Application**, submit a signed **Form 540PR: Payment Request** along with all required documentation before the incentive reservation expiration deadline indicated in the notice. A complete, accurate, and verifiable W-9 for Project Owner will be required for incentive payment.

## PROJECT INFORMATION

PROJECT OWNER NAME		COMPANY	
BUILDING/PROJECT NAME		PROJECT ID (IF KNOWN)	
SITE ADDRESS		CITY, STATE, ZIP	
PERMITTED UNDER 2019 ENERGY CODE?	TARGET EUI (CAN BE ESTIMATED)	EXPECTED CONSTRUCTION COMPLETION DATE	

Click the boxes below to be linked to the corresponding Incentive Application:

Design Assistance and Energy Modeling Incentive Application

Whole Buildings Project Installation Incentive Application

Metering and Certification Incentive Application

### RETURN FORM TO:

Energy Trust of Oregon – New Buildings  
421 SW Oak Street, #300, Portland, OR 97204  
1.877.467.0930 **telephone**  
503.961.7642 **fax**  
newbuildings@energytrust.org **email**

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## Part One: Design Assistance and Energy Modeling Incentive Application

### DESIGN ASSISTANCE AND ENERGY MODELING INCENTIVES

To apply for any **Form 520WB-2019** Part One: Design Assistance and Energy Modeling incentives, Project Owner must confirm that the enrolled project meets the criteria listed in the Overview and Eligibility section and that Project Information section is accurate. If any updates are needed, contact a Program representative before submitting this form to confirm eligibility.

### DESIGN ASSISTANCE REQUIREMENTS AND INCENTIVE CALCULATION

- Description:** This incentive supports project teams that hold a qualifying collaborative project team meeting, sometimes referred to as a design charette, to discuss energy use target and other energy-related topics with the entire project team (project must be in schematic design or earlier)
- Submittal Requirements:** Complete this **Incentive Application** and submit it with:
  - Project team meeting agenda
  - List of invited attendees (including each person’s role and contact information). To qualify, the project team meeting must be consistent with the following:
    - Required:** Owner, Architect, Mechanical Engineer, Energy Modeler, Meeting Facilitator, Lighting Designer, Energy Trust Program Representative
    - Recommended:** General Contractor, Building Operator
    - Additional Incentives Available:** Solar Trade Ally, Grid-interactive Efficient Building (GEB) expert, Commissioning Authority
    - Discussion topics:** see [Early Design Assistance Template](#) for detailed and customizable agenda
- Incentive Calculation:** The standard incentive amount available for a qualifying project team meeting is shown below.

Offering	Incentive Amount
Assistance for Early Design Meeting	<b>\$5,000</b>
Bonus for Solar Trade Ally Attending (see <a href="#">EDA Agenda and Report Template</a> for required topics)	<b>\$500</b>
Bonus for Commissioning Agent Attending (See <a href="#">EDA Agenda and Report Template</a> for required topics)	<b>\$500</b>
Bonus for GEB Expert(s) Attending (See <a href="#">EDA Agenda and Report Template</a> for required topics)	<b>\$500</b>

If the project is eligible for Energy Trust natural gas incentive funding but does not receive electric service from either Portland General Electric (PGE) or Pacific Power, the incentive available will be one-half the standard incentive amount shown in the table above for the Early Design Meeting and for Commissioning Agent Bonus. Solar Bonus and GEB Bonus incentives are only available to projects served by PGE or Pacific Power.

- Form 540PR Documentation:** Project team meeting minutes or report, including attendees, demonstrating that it met the attendance and discussion topic requirements for the incentives requested. Must include a written summary (by Project Owner/Owner’s Representative) addressing, at a minimum:
  - Project’s energy performance goals (Target EUI)
  - List of applicable strategies that will be evaluated in the next phase of design  
How the team plans to address constraints related to energy performance
  - If applicable, all documentation required for any optional bonus incentive discussion topic (see [EDA Agenda and Report Template](#) for details)

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### TECHNICAL ASSISTANCE AND ENERGY MODELING REQUIREMENTS AND CALCULATIONS

1. **Description:** This incentive supports qualifying technical studies that examine unique or aggressive energy saving opportunities for the project, such as: shoebox modeling, computational fluid dynamics (CFD)/bulk airflow analysis, daylighting studies, commissioning design review, or similar studies as may be approved by the Program. In addition, incentive assistance is available to develop a qualifying whole building energy model. Submittal of a whole building energy model, meeting Program requirements, for the project is a **Form 520WB** application requirement.
2. **Submittal Requirements:** If not previously submitted for early design assistance (above), complete this **Incentive Application** and submit it to the Program, along with the following documentation for each proposed study or energy modeling assistance. If multiple studies are proposed, the required documentation listed below must be submitted each time and each request will be independently reviewed for incentive eligibility and reservation purposes. Please note that if the project site is served by only one participating utility (electric or natural gas), the proposed study must be relevant to that energy source. For *each* proposed study, submit the information outlined in the box below.
  - a. For whole-building energy modeling, complete and submit the [Energy Modeling Summary Workbook](#), with the Project Description tab completed, to provide the information below.
  - b. For all other technical studies, applicants are encouraged to use the [Technical Study Summary Template](#), to provide the information below.

<p>Project Description</p> <ul style="list-style-type: none"><li>o Briefly describe the type, use and square footage of the facility.</li><li>o Identify whether the project is new construction or a major renovation. In the case of a major renovation clearly identify those building components and systems that are part of the renovation, and the extent to which they will be renovated and/or replaced.</li></ul> <p>Description of Analysis:</p> <ul style="list-style-type: none"><li>o Name and contact information for the firm that will perform the analysis, a description of the analysis work that will be performed, the analytical approach that will be used (i.e. spreadsheet calculations, manufacturer calculation tools, simulation model), and how the results will inform the final energy savings calculations.</li><li>o Estimate of the labor hours required for the needed task areas (i.e. baseline model development, proposed model development, spreadsheet calculations, analysis report procurement, etc.)</li><li>o Total not-to-exceed cost estimate to perform the technical assistance plan identified herein</li></ul> <p>Duration and milestones: Estimated start and end dates for the study as well as all deliverable and milestone dates</p>
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- c. When available, submit 50% Construction Documents (CD) for review that design progression is in alignment with target EUI.
3. **Incentive Calculation:** For the purpose of this incentive calculation, an “electric-only site” is a site where all the site’s energy is provided solely by PGE or Pacific Power (i.e., site has no natural gas or other fuel source). This incentive will be calculated as follows:
  - a. If the project site has both electric and natural gas (on a qualifying rate schedule) utility service eligible to receive Energy Trust incentives **or** is an electric-only site (see description above), then the incentive will be calculated per study as 60% of actual eligible study costs, as approved by the Program, up to a maximum total incentive for all studies combined of \$40,000.
  - b. For all other sites, the proposed study must be relevant to the building systems served by the applicable participating utility (electric or natural gas) and the incentive will be calculated per study as 60% of actual eligible study costs, as approved by the Program, up to a maximum total incentive for all studies combined of \$20,000.

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## 4 Form 540PR Documentation:

- c. Technical assistance study analysis report. Reports can be in any format
- d. Whole building energy model (for energy modeling payment) or other analysis files (for all other technical study payments), including all supporting documentation
- e. Technical assistance study or energy modeling payment documentation (itemized invoice)

## SUBMITTAL

By signing 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 and in this **Form 520WB-2019** remains true and correct as of the date of this submittal, including without limitation the project's permitting under the 2019 Oregon Zero Energy Ready Commercial Code.

**All Projects:** In addition, by submitting this application, I further acknowledge and confirm Project Owner's commitment to exceeding applicable Oregon Energy Code requirements for the enrolled project through energy efficient design and equipment.

**Path to Net Zero Projects:** In addition, by submitting this application, I acknowledge and confirm Project Owner's commitment to achieving the Architecture 2030 Challenge targets adopted by the American Institute of Architects (AIA) through energy efficiency and/or renewable energy resources.

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

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
COMPANY

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## Part Two: Whole Building Project Installation Incentive Application

To apply for any **Form 520WB-2019** Part Two: Whole Building Project Installation incentives, Project Owner must confirm that the enrolled project meets the criteria listed in the Overview and Eligibility section and that Project Information section is accurate. If any updates are needed, contact a Program representative before submitting this form to confirm eligibility.

### REQUIREMENTS AND INCENTIVE CALCULATION

- Description:** Modeled savings incentives are available for energy efficiency savings resulting from Project Owner's installation of qualifying energy efficient design features identified by the Program in submitted project modeling analysis documentation.
- Submittal Requirements:** Complete this **Incentive Application** and submit it with the full Cx Report, with an Executive Summary, that includes:
  - Completed [Energy Modeling Summary Workbook](#)
  - Whole building energy modeling files
  - Supporting equipment documentation relevant to the energy efficient design features, including product data sheets, mechanical drawings, equipment schedules, lighting fixture plans and schedules, floor plans, and architectural drawings. Refer to the **Technical Guidelines** for further information regarding requirements.
- Incentive Calculation:** An on-site Program verification visit is required. Installation incentives are based on the Program's estimated annual energy savings for the whole building project and are subject to Program per-project installation incentive caps. Incentive rates are calculated based on whether Path to Net Zero approved EUI is achieved:

EUI Achieved?	Electric Incentive Rate (\$ per estimated kWh savings)	Natural Gas Incentive Rate (\$ per estimated Therm savings)
Above-code	\$0.25	\$0.80
Path to Net Zero	\$0.40	\$1.20

- Form 540PR Documentation:** Payment documentation, such as vendor invoices showing make, model, and quantity purchased; or AIA Payment Documents for the project. Product data sheets (if not previously submitted).

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## SUBMITTAL

By signing 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 and in this **Form 520WB-2019** remains true and correct as of the date of this submittal, including without limitation the project's permitting under the 2019 Oregon Zero Energy Ready Commercial Code.

**All Projects:** In addition, by submitting this application, I acknowledge and confirm Project Owner's commitment to exceeding applicable Oregon Energy Code requirements for the enrolled project through energy efficient design and equipment.

**Path to Net Zero Projects:** In addition, by submitting this application, I acknowledge and confirm the Project Owner's commitment to achieving the Architecture 2030 Challenge targets adopted by the American Institute of Architects (AIA) through energy efficiency and/or renewable energy resources.

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

SIGNATURE

DATE

NAME

TITLE

COMPANY

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### Part Three: Metering and Certification Incentive Application

To apply for any **Form 520WB-2019** Part Three: Metering and Certification incentives, Project Owner must confirm that the enrolled project meets the criteria listed in the Overview and Eligibility section and that Project Information section is accurate. If any updates are needed, contact a Program representative before submitting this form to confirm eligibility. **To be eligible for incentives, this Part Three Incentive Application must be submitted no later than 60 days after the Program-documented construction completion date**

#### REQUIREMENTS AND INCENTIVE CALCULATIONS

##### Energy Metering

- Description:** In high-performance buildings, it is critical that the building operation is monitored, as actual energy performance may differ significantly from what was predicted. Additionally, system-level submetering enables building owners and operators to assess the performance of individual systems in order to diagnose operational issues and find areas for improvement. To qualify for this incentive, at minimum, project teams must install metering equipment for the site that provides whole-building, 15-minute interval data for electricity, one-hour interval data for gas, and one-hour interval for any on-site renewable energy. Projects with installed sub-metering equipment will also qualify. Project teams are encouraged to sub-meter the following end uses: HVAC equipment, lighting systems, plug loads, process loads (e.g. data servers and food service equipment).
- Submittal Requirements:** Complete this **Incentive Application** and submit it with:
  - A brief (1 page or less) summary outlining the metering activities to be implemented, consistent with the Description above
  - An estimate of the total cost and hours required for the metering activities identified in the summary
- Incentive Calculation:** For the purpose of this incentive calculation, an “electric-only site” is a site where all the site’s energy is provided solely by PGE or Pacific Power (i.e. site has no gas or other fuel source). This incentive will be calculated as follows:
  - If the project site has both electric and natural gas (on a qualifying rate schedule) utility service eligible to receive Energy Trust incentives **or** is an electric-only site (see description above), then the incentive will be calculated as 50% of the actual costs of the metering equipment and labor, as approved by the Program, up to a maximum of \$20,000.
  - For all other sites, the incentive will be calculated as 25% of the actual costs of metering equipment and labor, as approved by the Program, up to a maximum of \$20,000
- Form 540PR Documentation**
  - List of all metering equipment installed, including: systems metered, metered data type, data collection frequency, make, model, and quantity of metering equipment
  - Product information detailing the capabilities of the metering equipment installed
  - Payment documentation including vendor invoices showing the metering equipment costs and installation labor costs

##### Zero Energy Certification

- Description:** This incentive supports project teams that attain the International Living Future Institute’s (ILFI’s) Zero Energy Certification. In order to achieve the Zero Energy Certification, buildings must show 12 months of consecutive zero energy performance data. For more information on eligibility and steps on how to apply for the Zero Energy Certification, visit [living-future.org/zero-energy/certification](http://living-future.org/zero-energy/certification). To qualify for this incentive, the project team must complete all steps to apply for and achieve ILFI’s Zero Energy Certification.
- Submittal Requirements:** Submit this Incentive Application, along with:
  - A brief (1 page or less) summary outlining the Zero Energy Certification application process and timeline, consistent with the Description above

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- An estimate of the total cost and hours required for the application activities
- 3. **Incentive Calculation:** The incentive amount available for qualifying projects that apply for and achieve Zero Energy Certification is \$2,000.
- 4. **Form 540PR Payment Request Documentation:**
  - Copies of the project documentation submitted to ILFI for Zero Energy Certification, which may include:
    - Completed Energy Usage Table with monthly information gathered from tracking systems that clearly record energy consumed and produced
    - Energy bills for a continuous 12-month period
    - Photographs of energy consuming and energy producing systems
    - Narrative describing the renewable energy system(s) and major components, their function, and location(s)
  - Documentation showing ILFI's final notice of approval of the Zero Energy Certification
  - Payment documentation showing the paid Zero Energy Certification registration and certification fees

## SUBMITTAL

By signing 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 and in this **Form 520WB-2019** remains true and correct as of the date of this submittal, including without limitation the project's permitting under the 2019 Oregon Zero Energy Ready Commercial Code.

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

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
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