

**Form 520MS**  
**Incentive Application: Modeled Savings**  
**Business Energy Solutions – New Buildings**

For Program Use Only      OM:      Project ID:      FT ID:

Portland Energy Conservation, Inc. (PECI) is a Program Management Contractor (PMC) for Energy Trust of Oregon, Inc.



## 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® or Low-rise Multifamily ENERGY STAR® incentives from the Program cannot apply for this incentive. Any measure which, either separately or as part of a project, has or will receive an incentive from any other Energy Trust offering is ineligible. This **Incentive Application** applies only to projects permitted under the 2010 Oregon Energy Efficiency Specialty Code (Oregon Energy Code).

Modeled savings incentives are available for energy efficiency savings resulting from the installation of qualifying energy measures identified by the Program in a project's submitted modeling analysis documentation. To be eligible for incentives, the equipment and measures must exceed the Oregon Energy Code, must have a minimum of at least a one-year simple payback, and must pass the Program's cost-effectiveness test. Please refer to the **Technical Guidelines**, available on the Program website, for further information regarding our modeling requirements.

## 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, along with:
  - Narrative describing the energy efficiency measures (projects are encouraged to use the Energy Analysis Report Template ([http://energytrust.org/library/forms/NBE\\_TP\\_RptTemplate.doc](http://energytrust.org/library/forms/NBE_TP_RptTemplate.doc)))
  - Whole building energy modeling files
  - Savings Summary Worksheet ([http://energytrust.org/library/forms/NBE\\_TL\\_SavingsSummaryWorksheet.xls](http://energytrust.org/library/forms/NBE_TL_SavingsSummaryWorksheet.xls))
  - Supporting equipment documentation relevant to the energy efficiency measures, including product data sheets, mechanical drawings, equipment schedules, lighting fixture plans and schedules, floor plans, and architectural drawings. Refer to the Technical Guidelines ([http://energytrust.org/library/forms/NBE\\_PG\\_TechGuidelines.pdf](http://energytrust.org/library/forms/NBE_PG_TechGuidelines.pdf)) for further information regarding requirements.
3. If qualifying measures are identified and this application is approved, Project Owner will receive an incentive reservation notice from the Program. This notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to install the measures and submit all required completion documentation).
4. Install the energy efficiency measures.
5. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
  - Complete and signed **Payment Request (Form 540PR)**
  - Product data sheets (if not previously submitted)
  - Payment documentation, such as vendor invoices showing make, model, and quantity purchased; or CPA's letter submitted with the BETC completion documents; or AIA Payment Documents for the project.
  - Project Owner's current W-9 (if not previously submitted)

If Project Owner applies for additional installed measure incentives using other Energy Trust tools, workbooks, or forms, the Program will combine all approved installed measure incentives into one payment and only one signed **Payment Request** is required.

6. A site verification visit may be required by the Program prior to final payment.

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**Incentive Calculation**

Incentives are based on the estimated annual energy savings of the measures and are subject to Program per-project installation incentive caps. Incentive rates are calculated based on the percent energy savings beyond Oregon Energy Code, according to the following tables:

**New Construction Projects**

% savings beyond code	Electric Incentive Rate(\$ per kWh)	Gas Incentive Rate (\$ per therm)
1-15%	\$0.15	\$0.80
16%	\$0.16	
17%	\$0.17	
18%	\$0.18	
19%	\$0.19	
20%	\$0.20	
21%	\$0.21	
22%	\$0.22	
23%	\$0.23	
24%	\$0.24	
25%	\$0.25	
26%	\$0.26	
27%	\$0.27	
28%	\$0.28	
29%	\$0.29	
30% or greater	\$0.30	

**Major Renovation Projects**

% savings beyond code	Electric Incentive Rate (\$ per kWh)		Gas Incentive Rate (\$ per therm)
	Lighting Measures	Non-Lighting Measures	
1-17%	\$0.17	\$0.25	\$1.00
18%	\$0.18		
19%	\$0.19		
20%	\$0.20		
21%	\$0.21		
22%	\$0.22		
23%	\$0.23		
24%	\$0.24		
25%	\$0.25		
26%	\$0.26	\$0.26	
27%	\$0.27	\$0.27	
28%	\$0.28	\$0.28	
29%	\$0.29	\$0.29	
30% or greater	\$0.30	\$0.30	

For major renovation projects, the following additional requirements apply:

- Lighting measure incentives are capped at 35% of eligible project cost, not to exceed 100% of incremental cost.
- Non-lighting electric incentives are capped at 50% of eligible project cost, not to exceed 100% of incremental cost.
- Gas incentives are capped at 35% of eligible project cost, not to exceed 100% of incremental cost.

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**Project Information**

<b>Project Owner Name</b>	<b>Company</b>
<input type="text"/>	<input type="text"/>

<b>Building/Project Name</b>	<b>Project ID (if known)</b>
<input type="text"/>	<input type="text"/>

**Expected Construction Completion Date**

**ENERGY ANALYST (if applicable)**

<b>Analyst Name</b>	<b>Title</b>	<b>Phone</b>	<b>Email</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

<b>Firm Name</b>	<b>Address</b>	<b>City, State Zip</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Submittal**

Project Owner understands and agrees that the terms and conditions contained in this **Incentive Application** are in addition to, and governed by, its **Project Enrollment Application** agreement with Energy Trust for the identified project. Project Owner further agrees that 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)**

<b>Type or Print Name Here</b>	<b>Title</b>	<b>Date</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

<b>Firm Name</b>	<b>Phone</b>	<b>Email</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

**FOR MORE INFORMATION:**

Please visit [energytrust.org/business](http://energytrust.org/business) or call 1.877.467.0930