

**Form 520ED
Incentive Application: Early Design Assistance
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. To apply for an early design assistance incentive, projects must be in schematic design or earlier. Tenant improvement projects should contact the Program for additional eligibility requirements before submitting this form. Projects seeking Low-rise Multifamily ENERGY STAR[®] incentives from the Program cannot apply for this incentive.

Early design assistance is provided to help offset some of the costs of holding a collaborative project team meeting to discuss energy-related topics with your entire project team.

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:
 - Project team meeting agenda
 - List of invited attendees (include each person's role and contact information)
3. Following its review of the application, Energy Trust will notify Project Owner via e-mail of its decision. If the application is approved for an incentive reservation, you will receive a written notice. The incentive reservation notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to complete the project team meeting and submit all required completion documentation).
4. Schedule and conduct your project team meeting according to the following requirements:

Required attendees:

- Owner
- Architect
- Mechanical Engineer
- Energy Analyst
- Meeting Facilitator

Optional attendees (recommended):

- Energy Trust Program Representative
- General Contractor
- Commissioning Agent
- Operator

Required discussion topics:

- Building attributes (building shape, orientation and massing) and programmatic assumptions (building type, usage, occupancy and equipment scheduling)
- Preliminary energy end-use breakdown based on the building type's typical energy use.
- Energy efficiency measures:
 - Building envelope design (% glazing, glazing performance, external shading, wall & roof performance, infiltration)
 - Daylighting & lighting design (efficient lighting fixtures, lighting controls)
 - Heating, ventilation & air conditioning systems and passive heating and cooling strategies
 - Domestic hot water systems
 - Plug load & miscellaneous load management

Optional topics (recommended):

- Results of studies identifying climate conditions and site potential
- On-site renewable considerations
- Operation and maintenance strategies
- Strategy for lifecycle cost analysis of energy measures, including preliminary list of measures to analyze
- Monitoring of building performance

5. Prepare a written report or minutes documenting your project team meeting discussion and results.
6. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
 - Complete, signed **Payment Request (Form 540PR)**
 - Meeting minutes or report from the project team meeting demonstrating that it met the requirements identified above
 - Project Owner's current W-9 (if not previously submitted)

**Form 520ED
Incentive Application: Early Design Assistance
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.

Incentive Calculation

The maximum incentive amount available to a qualifying project for early design assistance is \$2,500. If the project site is served by only one eligible utility, the maximum early design assistance incentive available will be \$1,250, unless the project uses only an electric fuel source and is located in an eligible electric utility territory.

Project Information

Project Owner Name	Company
Building/Project Name	Project ID (if known)

Check the box below to indicate Project Owner's commitment (required):

- Yes, Project Owner is committed to achieving at least 5% energy savings beyond applicable Oregon energy code requirements for the enrolled project through energy efficiency measures.**

PROJECT TEAM MEETING DETAILS

Date	Time	Location

FACILITATOR *(the team meeting will be facilitated by the following contact)*

Facilitator Name	Title	Phone	Email
Firm Name	Address	City, State Zip	

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)

Type or Print Name Here	Title	Date
Firm Name	Phone	Email

FOR MORE INFORMATION:

Please visit energytrust.org/business or call 1.877.467.0930