

### OVERVIEW AND ELIGIBILITY

A signed copy of the **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. Early design assistance is provided to help offset some of the costs of holding a collaborative project team meeting, sometimes referred to as a design charrette, to discuss energy-related topics with the entire project team.

To apply for an early design assistance incentive, Project Owner must be committed to exceeding applicable Oregon Energy Code requirements for the enrolled project, and the project must be in schematic design or earlier. This incentive applies only to projects permitted under the 2014 Oregon Energy Efficiency Specialty Code. Tenant improvement projects should contact the Program for additional eligibility requirements before submitting this form.

**Path to Net Zero projects:** If Project Owner is pursuing Path to Net Zero (PTNZ) incentives in connection with this **Incentive Application**, Project Owner must additionally be committed to achieving the Architecture 2030 Challenge targets adopted by the American Institute of Architects (AIA) through energy efficiency and/or renewable measures. Contact the Program to discuss Path to Net Zero eligibility 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:
  - a. Project team meeting agenda
  - b. 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:

#### Attendees at Early Design Meeting

Owner, Architect, Mechanical Engineer, Energy Analyst, Meeting Facilitator	<b>Required for all projects</b>
Lighting Designer, General Contractor, Energy Trust Program Rep, Solar Trade Ally (if applicable)	<b>Recommended for general projects; Required for Path to Net Zero</b>
Commissioning Agent, Building Operator	<b>Recommended</b>

#### Discussion Topics

<ol style="list-style-type: none"> <li>I. Meeting Objectives:                     <ol style="list-style-type: none"> <li>a. Establish project’s energy goals and identify strategies to meet those goals</li> </ol> </li> <li>II. Meeting Outcomes:                     <ol style="list-style-type: none"> <li>a. Documentation of energy performance goals</li> <li>b. Prioritized strategies for team to pursue through further analysis/design</li> <li>c. Understanding of potential Energy Trust incentives to support achievement of goals</li> <li>d. Clarity on next steps</li> </ol> </li> <li>III. Discussion Topics:                     <ol style="list-style-type: none"> <li>a. Energy performance goals</li> <li>b. Energy use breakdown by end use</li> <li>c. Strategies for achieving energy savings goals</li> </ol> </li> </ol>	<b>Required for all projects</b>
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#### RETURN FORM TO

Business Energy Solutions – New Buildings

100 SW Main Street, #1500, Portland, OR 97204  
1.877.467.0930 **telephone** 503.961.7642 **fax**

[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only

OM:  
Project ID:

FT ID:

<ul style="list-style-type: none"> <li>i. Reduce loads</li> <li>ii. Use efficient systems</li> <li>iii. Plan for plug loads and occupant behavior</li> <li>iv. Use solar and other renewables to meet remaining demand</li> <li>v. Additional discussion topics</li> </ul> <ul style="list-style-type: none"> <li>d. How Energy Trust New Buildings may support project</li> <li>e. Next Steps</li> </ul> <p>* See Early Design Assistance Template for detailed, and customizable, agenda</p> <ul style="list-style-type: none"> <li>• <a href="#">General Project Template</a></li> <li>• <a href="#">Path to Net Zero Template</a></li> </ul>	
<ul style="list-style-type: none"> <li>I. Discussion Topics for Solar Add-On             <ul style="list-style-type: none"> <li>a. Building design points to consider in order to balance solar production, solar incentive eligibility and other project goals                 <ul style="list-style-type: none"> <li>i. System Layout, Structural &amp; Electrical Considerations</li> <li>ii. Financial Considerations &amp; Economics</li> </ul> </li> </ul> </li> </ul> <p>*See Solar Add-On agenda template for required topics.</p> <ul style="list-style-type: none"> <li>• <a href="#">Solar Add-On Agenda Template</a></li> </ul>	<p><b>Required for projects pursuing Solar Incentive Add-On.</b></p> <p><b>Conversation must be led by Solar Trade Ally.</b></p>

5. Submit (by Project Owner/Owner's Representative) a written summary that documents:
  - Project's energy performance goals
  - List of applicable strategies that will be evaluated in the next phase of design
  - How the team plans to address constraints
6. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
  - Complete, signed **Form 540PR: Payment Request**
  - 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)

### INCENTIVE CALCULATION

The standard incentive amount available to a qualifying project for early design assistance is shown in the table below.

Project Type	Incentive Amount	Bonus for Solar Trade Ally Attending	Bonus for Commissioning Agent Attending
Efficiency Projects	\$2,500	\$500 (see <a href="#">Solar Add-On Agenda Template</a> for required topics)	\$500
Path to Net Zero projects ≤ 20,000 square feet	\$5,000	N/A (Required Attendee for PTNZ)	N/A
Path to Net Zero projects > 20,000 square feet	\$10,000	N/A (Required Attendee for PTNZ)	N/A

If the project site is served by only one eligible utility, the early design assistance incentive available will be one-half the amounts shown in the table above, unless the project uses only an electric fuel source and is located in an eligible electric utility territory. The Solar Add-On incentive is only available to projects served by an eligible electric utility.

### PROJECT INFORMATION

PROJECT OWNER NAME	COMPANY
BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)

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# Early Design Assistance

## New Buildings I Incentive Application I Form 520ED



### Project Team Meeting Details

DATE	TIME	LOCATION
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### Facilitator (the team meeting will be facilitated by the following contact)

FACILITATOR NAME	TITLE	PHONE	EMAIL
FIRM NAME	ADDRESS	CITY, STATE, ZIP	

### SUBMITTAL

By typing or printing 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 remains true and correct as of the date of this submission.

**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 efficiency measures.

**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 measures.

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

\_\_\_\_\_  
**Signature** **Title** **Date**

\_\_\_\_\_  
**Firm Name** **Phone** **Email**

### FOR MORE INFORMATION

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

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