**Early Design Meeting Agenda and Report Template for:** <Project Name>

*The topics below are required for the optional incentive add-on to discuss solar. To qualify for the additional $500 incentive, these conversations must be led by a Solar Trade Ally who attends the meeting.* ***This solar discussion is in addition to the required energy efficiency topics presented in the*** [***General Project Template***](https://www.energytrust.org/wp-content/uploads/2017/08/NBE_EDA-Template.docx)***.***

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|  **Meeting Details** |
| DATE | TIME |
| LOCATION |

**Required Agenda Topics for Early Design Meeting Solar Add-On Incentive:**

* + Building Design points to consider in order to balance solar production, solar incentive eligibility and other project goals
		- For reference: [Energy Trust of Oregon Solar Ready Design requirements](https://insider.energytrust.org/wp-content/uploads/nb_solarready_comm_design_construction_req.pdf)
		- System Layout
			* Building orientation and roof tilt
			* Walkways to meet Oregon fire code and provide access for maintenance
			* Minimize shade and obstructions to maximize solar system performance and customer return on investment
				+ Consider the height and location of HVAC equipment, parapet, elevator shafts, existing and future trees, etc.)
			* Total Solar Resource Fraction (TSRF): knowing the system layout and location of any obstructions will allow the solar trade ally to calculate how much of the available sun the system will receive
			* *Point to consider – do you want additional visible solar elements (solar awning, solar flower, etc.) to be included in addition to the main system on the roof?*
		- Structural
			* Engineer roof structure to meet necessary load requirements to support PV system
			* *Point to consider - Solar modules are attached to the building with “solar racking” systems. The type of roof system being used can affect the cost of the attachment and flashing that must be used to mount solar on the roof*
		- Electrical
			* *Point to Consider – Solar systems must be “plugged in” so you will need to plan space near a main electrical panel*
			* Include raceway and/or conduit runs from the roof to the electrical room or other space identified for the solar electrical equipment
			* Main electrical panel sized with space on the busbar for the solar system to be “plugged in”
			* Space for inverter and electrical balance of system in electrical room or space identified for the solar electrical equipment
	+ Financial Considerations & Economics
		- System size, tilt, orientation, and shade will allow the solar trade ally to calculate estimated annual production
		- General Cost guideline
		- Available Grants
			* Utility, state and federal grants, and other funding sources
		- Available Incentives – [Energy Trust of Oregon](https://www.energytrust.org/incentives/solar-for-your-business/#tab-two) cash incentive
		- Tax Benefits - Federal Investment Tax Credit (ITC) and Accelerated Depreciation
		- Financial Analysis
			* *Based on the discussion and project goals, we recommend that the Solar Trade Ally provide the project team with a generic financial summary based on a few proposed system sizes to guide the discussion and aid the design process.*
	+ Specific local permitting or zoning considerations
	+ Next steps to incorporate solar into your building & strategies to reduce barriers to solar later in the project timeline
		- Solar Development Assistance – contact program for information
		- [Solar Installation Incentive Information](https://www.energytrust.org/incentives/solar-for-your-business/) – [Energy Trust Solar for Business Website](https://www.energytrust.org/incentives/solar-for-your-business/)
		- [Solar Ready Construction Incentives](https://www.energytrust.org/wp-content/uploads/2016/10/NBE_FM0520SR.pdf) – [Solar Ready Incentive Application form](https://www.energytrust.org/wp-content/uploads/2016/10/NBE_FM0520SR.pdf)

Template for Action Plan

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| --- | --- | --- |
| **What** | **Who** | **By When** |
| *e.g., Provide proposed system sizes & financial analysis to project team* | *e.g., Solar Trade Ally* | *e.g., Next week* |
| *e.g., Explore Solar Development Assistance incentive* | *e.g., Project Team & Solar Trade Ally* | *e.g., in 1 month* |
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