

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 charette, 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 2019 Oregon Energy Efficiency Specialty Code. Project Owners that intend to pursue whole building energy modeling incentives should submit Part I of Form 520WB to apply for Early Design Assistance instead of this form. Tenant improvement projects should contact the Program for additional eligibility requirements before submitting this form.

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. Schedule and conduct your project team meeting according to the chart below:

Attendees at Early Design Meeting

Owner, Architect, Mechanical Engineer, Energy Analyst, Meeting Facilitator	Required
Lighting Designer, General Contractor, Energy Trust Program Rep, Building Operator	Recommended
Solar Trade Ally, Commissioning Agent	If Applicable

Discussion Topics

See [Early Design Assistance Template](#) for detailed, and customizable agenda

4. Submit a written summary that documents:
 - Project's energy performance goal
 - 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
5. 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 Solar Add-On Agenda Template for required topics)	\$500

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 **email**

For Program Use Only

OM:
Project ID:

FT ID:

Early Design Assistance

New Buildings I Incentive Application I Form 520ED-2019



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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)

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.

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

Signature	Title	Date
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Firm Name	Phone	Email
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FOR MORE INFORMATION

Please visit energytrust.org/business or call 1.877.467.0930

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