

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.

Program forms to be completed by Project Owner or authorized representative. Must be signed and returned to New Buildings program (Program).

Submittal Instructions

A signed copy of the **Project Enrollment: Form 510E** must precede this workbook. The **Standard Track Incentive Workbook: Form 520S** must be submitted to the Program electronically in the Excel worksheet format and as a signed copy.

Project Owner Information

Building Project Name _____ Project ID (if known) _____
 Project Contact Name _____ Phone _____
 Email _____

Building Information

Electric Utility: < Select from drop down > Gas Utility: < Select from drop down >
 Heating Fuel: < Select from drop down > Domestic Hot Water Fuel: _____

Requested Incentive Summary

The total estimated incentive amount will be calculated once the quantity and type of equipment has been identified in the worksheets.

Measure	Incentive Amount
Lighting	\$ -
Motors	\$ -
Air Conditioning	\$ -
Heat Pumps	\$ -
Air-to-Air Heat Exchangers	\$ -
Chillers	\$ -
Demand Control Ventilation	\$ -
Variable Frequency Drives (VFDs)	\$ -
Natural Gas Equipment	\$ -
Multifamily and Lodging	\$ -
Grocery	\$ -
Foodservice	\$ -
Ice Machines	\$ -
Total	\$ -

Required Attachments With This Form 520S

- Product data sheets demonstrating equipment compliance (these may be submitted for review either when submitting **Form 520S** or upon project completion)
- If Project Owner has previously applied for Technical Assistance, please submit a signed and complete Form 540PR and W-9 to ensure timely payment.

Standard Track Payment Requirements

The following documents must be submitted to the Program within 60 days of the estimated construction completion date. All Program forms must be signed and completed.

1. **Payment Request: Form 540PR**
2. Revised **Form 520S**, if needed
3. Product data sheets demonstrating equipment compliance (if not previously submitted)
4. Payment documentation (suppliers or contractors can send the copies of the invoices directly to the Program)
5. If the incentive amount exceeds \$10,000, a site verification visit is required
6. Project Owner's current W-9 (if not previously submitted)

Signature

In addition to this **Standard Track Workbook: Form 520S**, I have submitted all required documentation as described in this form. By my signature below, I represent and warrant to Energy Trust that (i) I am authorized to sign this agreement on behalf of Project Owner, (ii) I have completed this application completely, truthfully and accurately to the best of my knowledge, and (iii) I have read, understand and agree to the terms and conditions of this agreement.

Signature _____
Name _____ **Title** _____ **Date** _____

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Additional Terms and Conditions

ELIGIBILITY: Incentives from the New Buildings program (Program) are available for eligible commercial, industrial, agricultural, and institutional new construction or major renovation projects in the Oregon service territories of Portland General Electric (PGE), Pacific Power, NW Natural, or Cascade Natural Gas. This **Form 520S** applies only to projects permitted under the 2007 Oregon Structural Specialty Code Chapter 13 (Energy Code). Projects permitted under the 2010 Oregon Energy Efficiency Specialty Code may not be eligible to receive the estimated incentive amounts described in this **Form 520S**. See the Oregon Building Codes Division website: <http://www.cbs.state.or.us/bcd/> for details of the 2010 code effective date. Final determination of eligibility rests solely with Energy Trust. The PMC provides program management contractor services for the Program on behalf of the Energy Trust.

APPLICATION: Project Owner (Project Owner includes Project Owner's legal assigns and successors in interest) must submit a signed and complete **Standard Track Application: Form 520S** to the Program, along with all required supporting documentation as described in this **Form 520S**. This **Form 520S** must be accompanied by a **Project Enrollment: Form 510E**, unless Project Owner has previously enrolled the project with the Program by (1) submitting a **Project Enrollment: Form 510E**, and (2) receiving a written project enrollment notification from the PMC. **If Project Owner is applying for incentives equal to or less than \$5,000**, Project Owner must submit a signed and complete **Form 510E**, **Form 520S** and **Payment Request: Form 540PR** to the Program, with all required accompanying documentation, within 60 days of project completion. **If Project Owner is applying for incentives greater than \$5,000**, project enrollment must occur prior to the purchase of any materials or equipment associated with energy saving measures for which Project Owner is seeking incentives. Project Owner is advised to retain a copy of all materials submitted to Energy Trust, and Energy Trust will not be responsible for lost documentation pertaining to Project Owner's application.

MEASURE INSTALLATION: Project Owner represents and warrants that it is legally authorized to perform the energy savings measures on the property on which those measures are performed and that any necessary landlord, owner, or other consent has been obtained. Project Owner is solely responsible for implementing the measures and for ensuring that all equipment purchased and work performed complies with all federal, state and local safety, building and environmental codes and any manufacturer instructions.

PROJECT DOCUMENTATION: Project Owner must submit all documentation required by this form. The Program reserves the right to request additional project information for review, as it deems necessary, prior to any payment of incentives and to ensure accountability for Program funds. Project Owner agrees to maintain and provide all relevant records for a minimum period of one year after receipt of any incentives.

INCENTIVE & PAYMENT: Funds for incentives for the Program are limited and subject to availability. The total amount that Energy Trust will pay a Project Owner for a project requesting incentive under both a **Standard Track Application: Form 520S** and a **Custom Track & Commissioning Application: Form 520C** will never exceed a maximum of \$500,000. Details for this Program, including incentives, are subject to change without prior notice. For approved applications, incentive funds will be paid upon completion and submission of the signed **Payment Request: Form 540PR** to the Program, along with all required accompanying documentation. Project Owner's **Form 540PR** and all required documentation referenced in this form must be received by the PMC office no later than sixty (60) days after the completion date shown on this application. If Project Owner's **Form 540PR** has different energy savings than the original application form, then Project Owner will be required to re-submit a revised application form along with the **Form 540PR** for review and approval. Please allow 45 days from Energy Trust's receipt of all required information for delivery of the incentive payment. Failure to provide all required information may result in delay or withholding of payment.

VERIFICATION: Reviews of the project work before, during, and after measure installation are a critical part of Energy Trust's verification process and Project Owner agrees to provide Energy Trust and its representatives with reasonable access to the project site, and all technical and other project documentation related to the measures for which it is requesting Energy Trust incentive funding. When required by Energy Trust, satisfactory completion of a post-installation inspection of the measures must occur before any incentive payment will be issued. This inspection and verification is for Program purposes only and no warranty is implied.

ACCESS AND EVALUATION: Project Owner authorizes Energy Trust and its representatives to access energy usage data at the project's electric accounts at the physical address of the property, and agrees to provide Energy Trust with such other reasonable assistance as may be necessary to obtain such information. Project Owner agrees to allow Energy Trust and its representatives with reasonable access to the installation site to: (1) inspect and review the project during and after completion, (2) read the meter(s), and/or (3) evaluate the project's operation. Project Owner agrees to cooperate when contacted by Energy Trust to request meter readings or other information related to any of the project measures which receive incentive funding.

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INFORMATION ABOUT SELF-DIRECTION: Under its agreement with the Oregon Public Utility Commission (OPUC), Energy Trust receives and invests some of the funds generated by the public purpose charge collected from the customers of PGE and Pacific Power. Although payment of the public purpose charge is generally mandatory, certain large customers - those that use more than one average megawatt of electricity (8,760,000 kilowatt hours) at one site in one year - may "self-direct" their public purpose charge payments to fund certified energy efficiency or renewable expenditures at their own facilities. Self-direction is optional, and over time, a customer may change its self-direct status. Whether or not the Participant is currently self-directing or determines to self-direct in the future, will affect the services and incentives the Participant is eligible to receive from Energy Trust. Energy Trust's self-direct policy and a copy of our Frequently Asked Questions Regarding Self Direction can be found on our website at www.energytrust.org.

IMPACT OF SELF-DIRECTION: Project Owner may not receive any incentives from Energy Trust for a measure that it is seeking self-direct credits for through ODOE. With the exception of certain prescribed motors and air conditioning units, Project Owners that are currently using conservation self-direct credits against the public purpose charge are generally eligible for up to 50% of the incentives that a non-self directing entity is eligible for. A Project Owner who determines to self-direct within 36 months after receiving any Program service or incentive, will be required to notify Energy Trust immediately and to repay to Energy Trust a pro rated refund amount according to the following formula:

$$\text{Pro Rated Refund Amount} = 0.5 \times A \times B$$

A = total amount of Energy Trust incentives paid

B = 36 minus the number of months elapsed since payment of Energy Trust incentive, divided by 36

DISCLAIMER / LIMITATION OF LIABILITY: Project Owner understands and agrees that, while Energy Trust may provide incentive funding, Energy Trust and PMC are not supervising work performed for the Project Owner nor are Energy Trust or PMC liable in any way for proper completion of that work or proper performance of any equipment purchased. Energy Trust is simply providing incentive funding to assist the Project Owner in identifying and implementing energy savings measures. **Energy Trust's liability to Project Owner is limited to recovery of amounts due for any incentive payments due and under no circumstances will Energy Trust be liable for any further amount whatsoever. In no event will Energy Trust or its PMC be liable pursuant to this agreement to Project Owner or to any third party for any damages, whether characterized as general, special, direct, indirect, punitive, consequential or otherwise.**

HAZARDOUS MATERIALS: Energy Trust and its representatives shall have no responsibility for the discovery, presence, handling, or disposal of or exposure of persons to hazardous materials of any kind in connection with Project Owner's site or facility, including without limitation asbestos, asbestos products, PCBs or other toxic substances.

GOVERNING LAW: Project Owner agrees that any disputes arising in connection with this agreement will be governed by Oregon law, without reference to its principles of conflict of law.

NO ENDORSEMENT: Energy Trust and/or its representatives do not endorse any particular manufacturer, contractor, equipment, or system design in promoting the Program. The fact that the names of particular manufacturers, contractors, equipment or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, equipment, or systems not mentioned are not implied to be unsuitable or defective in any way.

TAX LIABILITY: Energy Trust and/or its representatives are not responsible for any tax liability, which may be imposed on the Participant as a result of payment of any incentives. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

INFORMATION RELEASE: Project Owner agrees that Energy Trust may include the following information in reports or other documentation submitted to the Energy Trust's Board of Directors, the Oregon Public Utility Commission (OPUC), Oregon Department of Energy, Oregon Department of Housing and Community Services, or the Oregon Legislature: Project Owner's name, a description and location of the measures which received incentive funding, the amount of any Energy Trust services or incentive payments provided to Project Owner, and any resulting energy savings or generation. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.

FACSIMILE/SCANNED SIGNATURES: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail shall be the same as delivery of the original signed document. At the request of Energy Trust, Project Owner shall confirm documents with a facsimile transmitted signature or a scanned signature by providing an original document.

ASSIGNMENT AND TERMINATION: Energy Trust may, at any time, assign its rights under this Agreement to a third party when requested to do so by the OPUC under the Grant Agreement between Energy Trust and the OPUC dated November 20, 2001, and as amended from time to time (Grant Agreement). Upon sixty (60) days written notice, Energy Trust may terminate this agreement in the event that the Grant Agreement is terminated. Unless stated otherwise in this document, regardless of whether or not this application is approved, these terms and conditions shall survive the completion of any incentive payments provided hereunder.

FOR MORE INFORMATION:

Please visit energytrust.org/newbuildings/, or call 1.877.467.0930

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Lighting



Please complete the lighting incentive worksheet below. The information provided to the Program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. When multiple fixture types fit within a measure category (row), list the subtotal for each in the Fixture Type column. Documentation must be submitted for each efficiency requirement before incentives can be approved. For more information and examples please refer to the **New Buildings Participant's Manual** or call the Program at 1.877.467.0930.

Photoluminescent Exit Signs		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - UL 924 compliance - Cannot require input or backup battery power	All sizes and types		\$20		
Compact Fluorescent Fixtures		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - Compact fluorescent lamp - Certified by a NRTL (nationally recognized testing laboratory such as Underwriters Laboratories - UL) - Hard-wired fixture	CF 7 to 26 Watts hard-wired		\$25		
	CF 27 to 55 Watts hard-wired		\$35		
	CF ≥ 56 Watts hard-wired		\$45		
Cold Cathode Fluorescent Lamps		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - Cold cathode fluorescent lamp (CCFL), which is not used with digital dimming systems - Certified by a NRTL (nationally recognized testing laboratory such as Underwriters Laboratories - UL) - Minimum 2 year warranty - Hard-wired fixture	3 Watt		\$4		
	5 Watt		\$4		
	8 Watt		\$4		
	13 Watt		\$4		
	18 Watt		\$4		
High-Efficiency Fluorescent Fixtures (T8 or T5)		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - T8 or T5 lamp(s) - Electronic ballast - No more than 4 lamps - Luminaire efficiency ≥ 72% for parabolic fixtures or open-bottom luminaires. ≥ 80% for prismatic lensed luminaires. (Luminaire efficiency shall be tested per IES standards.)	High-efficiency 1-lamp T8 or T5 fixture		\$10		
	High-efficiency 2-lamp T8 or T5 fixture		\$10		
	High-efficiency 3-lamp T8 or T5 fixture		\$10		
	High-efficiency 4-lamp T8 or T5 fixture		\$10		
Fluorescent Fixtures with High Performance T8 Lighting Systems		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: The fixture will include a high performance 48" T8 lamp with a not-to-exceed nominal wattage of 32W and ballast system that is listed on the CEE qualifying product list. Click on the following link and go to the Commercial lighting information for the product list links. Submit documentation for fixture, lamp, and ballast. http://www.cee1.org/	High performance 1-lamp T8 fixture		\$20		
	High performance 2-lamp T8 fixture		\$20		
	High performance 3-lamp T8 fixture		\$20		
	High performance 4-lamp T8 fixture		\$20		

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Lighting



High-Efficiency Pendant & Wall Mounted Indirect Fluorescent Fixtures		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - Electronic ballast - No more than 3 lamps - Indirect or indirect/direct light distribution - Overall luminaire efficiency shall meet or exceed 77% (Luminaire efficiency shall be tested per IES standards.)	quantity 4 ft. sections of T8 lamps		\$14		
	quantity 4 ft. sections of T5 lamps		\$20		
High Bay T8 or T5 Fixtures		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - Electronic ballast - T5 fixture must have 3 or more lamps - T8 fixture must have 4 or more lamps - Luminaire efficiency ≥ 88% for T5 fixture ≥ 81% for T8 fixture - Fixture must be installed in a high bay area with a minimum ceiling height of 15 ft.	T8 or T5 lamps		\$35		
Bi-Level Lighting		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - 2 Lamp, 4' T8/T5 - Integrated occupancy sensor and dimming ballast capable of ≥ 50% wattage reduction - Installed in a restroom, stairwell, or emergency egress corridor - Units required by code are not eligible (Note 1)	quantity 4 ft. sections of T5/T8 lamps		\$26		
Fluorescent Controls		Qty	Unit Incentive	Total Incentive	Fixture Type
Efficiency Requirements: - Hard-wired device - Passive infrared technology and/or ultrasonic technology, or two-technology - Control a minimum of 100 Watts - Units with non-resetting manual "ON" override are not eligible - Units required by code are not eligible (Note 1) Include Watts controlled per sensor in submission	Occupancy sensors (wall mounted)		\$75		
	Occupancy sensors (ceiling mounted)		\$75		
	Occupancy sensors (fixture mounted)		\$50		
	Occupancy sensors (wall switch)		\$25		

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Lighting



<p>Efficiency Requirements:</p> <ul style="list-style-type: none"> - Photo sensor - Control a minimum of 200 Watts - Units with non-resetting manual "ON" override are not eligible - Units required by code are not eligible (Note 2) 	<p>Daylight controlled dimming Include Watts controlled per sensor in submission</p>		\$100		
<p>Efficiency Requirements:</p> <ul style="list-style-type: none"> - Control fluorescent fixtures based on occupancy - Control a minimum of 200 Watts - Ballast power consumption in "Low" mode must not exceed 50% of full-load - Units with non-resetting manual "ON" override are not eligible - Units required by code are not eligible (Note 1) 	<p>Occupancy controlled hi-low switching Include Watts controlled per sensor in submission</p>		\$60		
HID Controls		Qty	Unit Incentive	Total Incentive	Fixture Type
<p>Efficiency Requirements:</p> <ul style="list-style-type: none"> - Control HID fixtures based on occupancy - Control a minimum of 700 Watts - Units with non-resetting manual "ON" override are not eligible - Units required by code are not eligible (Note 1) 	<p>Occupancy controlled hi-low switching Include Watts controlled per sensor in submission</p>		\$75		
<p>Efficiency Requirements:</p> <ul style="list-style-type: none"> - Photo sensor - Control a minimum of 700 Watts - Units with non-resetting manual "ON" override are not eligible - Units required by code are not eligible (Note 2) 	<p>Daylight controlled dimming Include Watts controlled per sensor in submission</p>		\$100		
LED Refrigeration Case Lighting		Qty	Unit Incentive	Total Incentive	Fixture Type
<p>Efficiency Requirements:</p> <ul style="list-style-type: none"> - LED refrigeration case lighting - Permanently installed fixture with electronic ballast - at least an 18 hour day 	<i>See Grocery & Foodservice tab</i>				
Total Lighting Worksheet Requested Incentive					\$0
<p>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application.</p>					

Notes:

- Offices less than 300 ft², meeting rooms, conference rooms, and classrooms are required by the Oregon Structural Specialty Code, Chapter 13 (Energy Code) to install occupancy sensors. Units in these space types are not eligible for Energy Trust incentives.
- Daylight dimming control units in atriums and classrooms, and on exterior lighting are required by the Oregon Structural Specialty Code, Chapter 13 (Energy Code), with some limited exceptions. Units in these spaces are not eligible for Energy Trust incentives.

Please complete the motor incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the *New Buildings Participant's Manual* or call the Program at 1.877.467.0930.

Table 1 — Incentive Level

Hp	Incentive Per Motor	Minimum Nominal Efficiency to Qualify as a Premium Motor					
		Open, Drip-proof (ODP)			Totally-enclosed, Fan-cooled (TEFC)		
		1200	1800	3600	1200	1800	3600
1	\$10	82.5	85.5	77.0	82.5	85.5	77.0
1.5	\$15	86.5	86.5	84.0	87.5	86.5	84.0
2	\$20	87.5	86.5	85.5	88.5	86.5	85.5
3	\$30	88.5	89.5	85.5	89.5	89.5	86.5
5	\$50	89.5	89.5	86.5	89.5	89.5	88.5
7.5	\$75	90.2	91.0	88.5	91.0	91.7	89.5
10	\$100	91.7	91.7	89.5	91.0	91.7	90.2
15	\$150	91.7	93.0	90.2	91.7	92.4	91.0
20	\$200	92.4	93.0	91.0	91.7	93.0	91.0
25	\$250	93.0	93.6	91.7	93.0	93.6	91.7
30	\$300	93.6	94.1	91.7	93.0	93.6	91.7
40	\$400	94.1	94.1	92.4	94.1	94.1	92.4
50	\$500	94.1	94.5	93.0	94.1	94.5	93.0
60	\$600	94.5	95.0	93.6	94.5	95.0	93.6
75	\$750	94.5	95.0	93.6	94.5	95.4	93.6
100	\$1,000	95.0	95.4	93.6	95.0	95.4	94.1
125	\$1,250	95.0	95.4	94.1	95.0	95.4	95.0
150	\$1,500	95.4	95.8	94.1	95.8	95.8	95.0
200	\$2,000	95.4	95.8	95.0	95.8	96.2	95.4

KEY	
	Select from drop-down lists
	Enter data

Motors must be within the size range listed in Table 1 to be eligible for Standard track incentives.

Table 2 — Motor Incentive Worksheet

Hp	ODP or TEFC	RPM	Nominal Efficiency	Minimum Efficiency	Incentive Amount	Qty	Total Incentive	Notes:
Ex. 15	TEFC	1200	92	91.5	\$150	2	\$300	Mfrg-ABC, Mod#123
Total Motor Worksheet Incentive						0	\$0	
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application.</i>								

Please complete the air conditioning incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the *New Buildings Participant's Manual* or call the Program at 1.877.467.0930.

Table 1 – Premium Efficiency Air Conditioning Incentives

Tons	EER	Incentive Per Unit
6	11	\$ 120
7.5	11	\$ 165
8.5	11	\$ 185
10	11	\$ 175
12.5	10.8	\$ 375
15	10.8	\$ 495
17	10.8	\$ 475
20	10	\$ 225
25	10	\$ 300

KEY	
	Select from drop-down lists
	Enter data in shaded cells

Air conditioning units must be within the size range listed in Table 1 to be eligible for Standard track incentives.

Table 2 – Premium Efficiency Air Conditioning Incentive Worksheet

Size	EER	Incentive Amount	Qty	Total Incentive	Notes
<i>Ex.: 6</i>	<i>11</i>	<i>\$438</i>	<i>2</i>	<i>\$876</i>	<i>Mfrg XYZ, Model 789</i>
Total AC Worksheet Incentive					
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application.</i>			0	\$0	

Please complete the heat pump incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the **New Buildings Participant's Manual** or call the Program at 1.877.467.0930.

Air to Air Heat Pumps (AAHP) *

Size	Minimum Efficiency		Incentive Amount
	Tons	HSPF/ COP	
6	10.6	3.5	\$900
7.5	10.6	3.5	\$1,125
8.5	10.6	3.5	\$1,275
10	10.6	3.5	\$1,500
12	10.1	3.5	\$1,800
12.5	10.1	3.5	\$1,875
15	10.1	3.5	\$2,250
17	10.1	3.5	\$2,550
20	10.0	3.5	\$3,000
25	10.0	3.5	\$3,750

Water Source Heat Pumps (WSHP) *

Size	Minimum Efficiency		Incentive Amount
	Tons	HSPF/ COP	
1	14.0	4.6	\$200
1.5	14.0	4.6	\$300
2	14.0	4.6	\$400
2.5	14.0	4.6	\$500
3	14.0	4.6	\$600
3.5	14.0	4.6	\$700
4	14.0	4.6	\$800
5	14.0	4.6	\$1,000
6	14.0	4.6	\$1,200
7.5	14.0	4.6	\$1,500
8.5	14.0	4.6	\$1,700
10	14.0	4.6	\$2,000
12	14.0	4.6	\$2,400
12.5	14.0	4.6	\$2,500
15	14.0	4.6	\$3,000
17	14.0	4.6	\$3,400
20	14.0	4.6	\$4,000
25	14.0	4.6	\$5,000

Ground Source Heat Pumps (GSHP) *

Size	Minimum Efficiency		Incentive Amount
	Tons	HSPF/ COP	
1	15.0	3.4	\$300
1.5	15.0	3.4	\$450
2	15.0	3.4	\$600
2.5	15.0	3.4	\$750
3	15.0	3.4	\$900
3.5	15.0	3.4	\$1,050
4	15.0	3.4	\$1,200
5	15.0	3.4	\$1,500
6	15.0	3.4	\$1,800
7.5	15.0	3.4	\$2,250
8.5	15.0	3.4	\$2,550
10	15.0	3.4	\$3,000

Heat pumps must be within the size range listed in these tables to be eligible for Standard track incentives.

KEY	
	Select from drop-down lists
	Enter data in shaded cells

* Not all sizes with corresponding requirements may be available at this time.

Unit Type	Unit Size	Cooling Efficiency	Heating Efficiency	Incentive Amount	Qty	Total Incentive	Notes
AAHP, WSHP, or GSHP	Tons	EER	HSPF or COP	\$		\$	Unit Labels (HP-1), Manufacturer & Model number
TOTAL HEAT PUMP WORKSHEET INCENTIVE (Add total qty & incentive amounts) Please attach equipment cut sheets containing Product Model Number, Manufacturer & Product Specifications to this application.					0	\$0	

Packaged Terminal Heat Pump incentives are available for Multifamily & Lodging projects. See the Multifamily & Lodging tab for details.

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Air-to-Air Heat Exchangers



Please complete the air-to-air heat exchanger incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the ***New Buildings Participant's Manual*** or call the program at 1.877.467.0930.

Air-to-Air Heat Exchangers

HEX technologies eligible for an incentive include the following: Countercross Heat Exchangers, Heat Wheels, Heat Pipe Heat Exchangers, and Runaround Heat Recovery Loops.

Notes:

1. Project must be in participating gas utility territory of NW Natural or Cascade Natural Gas. Incentive may be reduced for projects not in participating electric utility territories of PGE or Pacific Power.
2. Heat exchangers for exhaust air heat recovery on HVAC fan systems with supply air flow rates $\leq 1,000$ or $\geq 10,000$ cfm are not eligible (Section 1318.3).
3. Heat exchangers must meet or exceed Code-required performances as follows:
 - a. Capable of increasing the outside air supply temperature at design heating conditions by 20°F in Climate Zone 1 and 30°F in Climate Zone 2 (Section 1318.3).
 - b. For pools, spas and hot tubs over 200 square feet, heat recovery effectiveness shall be 70% at winter design conditions (Section 1315.5.3, item 1).
4. Heat exchangers are not eligible for heated indoor pools, spas or hot tubs over 200 square feet where heat recovered through dehumidification is used to heat pool, spa or hot tub room supply air (Section 1315.5.3).
5. Heat exchangers for buildings with fume hood systems having a total exhaust rate greater than 15,000 cfm are not eligible if they do not at least have one of either a) variable air volume hood exhaust and room supply systems, or b) direct makeup (auxiliary) air supply equal to at least 75% of the exhaust rate, both in accordance with the performance conditions specified in Section 1317.2.1 of the 2004 Oregon Structural Specialty Code (Energy Code).

Unit Label	Incentive Amount	CFM*	Total Incentive	Notes
Ex.: AHU-1	\$0.60/cfm	1,000	\$600	Manufacturer & Model Number of AHU and Manufacturer & Model Number of HEX
	\$0.60/cfm			
	\$0.60/cfm			
	\$0.60/cfm			
	\$0.60/cfm			
	\$0.60/cfm			
	\$0.60/cfm			

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Air-to-Air Heat Exchangers



	\$0.60/cfm		
TOTAL AIR-TO-AIR HEX WORKSHEET INCENTIVE (Add total qty & incentive amounts) <i>Please attach equipment cut sheets containing Product Model Number, Manufacturer & Product Specifications to this application.</i>		\$0	

* Outside air volume (cfm) should be used to calculate incentive amount.

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Business Energy Solutions—New Buildings
Chillers



Please complete the chiller incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the **New Buildings Participant's Manual** or call the Program at 1.877.467.0930.

Equipment Type		Equipment Size (tons)	Minimum IPLV*	Incentive Amount (\$/ton)	Test Procedure
Air-Cooled, With Condenser	Screw, Scroll, & Reciprocating	Less than 150 tons	3.30	\$50	ARI 550-92 or ARI 590-92 as appropriate
		150 tons and greater	3.18	\$50	
Air-Cooled, Without Condenser	Screw, Scroll, & Reciprocating	All Capacities	3.59	\$50	
Water-Cooled	Screw & Scroll	Less than 150 tons	5.40	\$50	ARI 550-92 or ARI 590-92 as appropriate
		150 tons to less than 300 tons	5.80	\$50	
		300 tons and greater	6.56	\$50	
	Centrifugal	Less than 150 tons	5.94	\$50	ARI 550-92
		150 tons to less than 300 tons	6.73	\$50	
		300 tons and greater	7.40	\$50	
	Reciprocating	All Capacities	6.41	\$50	ARI 590-92

KEY	
	Select from drop-down lists
	Enter data in shaded cells

Equipment Type		Unit Size	Unit Efficiency		Incentive Amount	Qty	Total Incentive	Notes
<i>Air-Cooled or Water-Cooled</i>	<i>Screw, Scroll, Centrifugal, or Reciprocating</i>	<i>Tons</i>	<i>IPLV</i>	<i>Min IPLV (see table above)</i>	<i>\$/ton</i>		<i>\$</i>	<i>Unit Label(Example:CH-1), Mfgr, & Model</i>
					\$0		\$0	
					\$0		\$0	
					\$0		\$0	
					\$0		\$0	

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Business Energy Solutions—New Buildings
Chillers



<p style="text-align: center;">TOTAL CHILLER WORKSHEET INCENTIVE (Add total qty & incentive amounts) <i>Please attach equipment cut sheets containing Product Model Number, Manufacturer & Product Specifications to this application.</i></p>	0	\$0	
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* IPLV is Integrated Part-Load Value

Please complete the demand control ventilation incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the ***New Buildings Participant's Manual*** or call the program at 1.877.467.0930.

Notes:

1. **Incentive may be reduced for projects not in participating gas utility territories of NW Natural and Cascade Natural Gas. Incentive may be reduced for projects not in participating electric utility territories of PGE and Pacific Power.**
2. Maximum Outside Air volume (cfm) controlled by demand control ventilation (usually the minimum outside air requirement for an air handler) should be used to calculate incentive amount.
3. Ventilation controls required by the Oregon Structural Specialty Code, Chapter 13, paragraph 1317.2.2 (Energy Code) are not eligible. Those areas include: classrooms, airport baggage and waiting areas, assembly without fixed seats, bowling centers, and stages and platforms. (Oregon Mechanical Specialty Code Table 1004.1.1)
4. Outside Air volume (cfm) must be greater than or equal to 500 cfm to be eligible for incentives.

Demand Control Ventilation - Gas Heating				
Equipment Label	Incentive Amount	Maximum Ventilation CFM*	Total Incentive	Notes
<i>Ex.: AHU-1</i>	<i>\$0.50/cfm</i>	<i>1,000</i>	<i>\$500.00</i>	<i>Manufacturer & Model of AHU and Manufacturer & Model Number for CO2 sensor</i>
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			

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Business Energy Solutions—New Buildings
Demand Control Ventilation



	\$0.50/cfm			
	\$0.50/cfm			
	\$0.50/cfm			
TOTAL DEMAND CONTROL VENTILATION WORKSHEET INCENTIVE (Add total qty & incentive amounts) <i>Please attach equipment cut sheets containing Product Model Number, Manufacturer & Product Specifications to this application.</i>			\$0	

Form 520S
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Business Energy Solutions—New Buildings
Variable Frequency Drives



Please complete the variable frequency drive (VFD) incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples, please refer to the *New Buildings Participant's Manual* or call the Program at 1.877.467.0930.

Table 1 – Eligible Fan or Pump Application Code

Code	Application
SFA	Supply Fan on a VAV air handler
SFP	Supply fan on a VAV packaged rooftop HVAC unit
RFA	Return fan on VAV air handler
RFP	Return fan on a VAV packaged or rooftop HVAC unit
BEF	Building exhaust fan
CWP	Chilled water distribution pump
HWP	Heating water distribution pump
FWP	Boiler feed water pump

* For other VFD applications, please submit a Custom/High Performance application.

Table 2 – VFD Incentives

Cumulative Motor HP Controlled By Each VFD	Incentive Amount Per Unit
3	\$700
5	\$900
7.5	\$1,100
8	\$1,150
9	\$1,200

** VFD is required on all fan and pump motors >= 10 hp, as stated in section 1317.10.3.1 in the 2007 Oregon Structural Specialty Code. They are thus ineligible for program incentives.

KEY	
	Select from drop-down lists
	Enter data in shaded cells

VFD units must be within the size range listed in Table 2 to be eligible for Standard track incentives.

Table 3 – VFD Incentive Worksheet

HP Controlled	Application Code	Incentive Amount	Qty	Total Incentive	Notes
<i>Ex.: 7.5</i>	<i>SFA</i>	<i>\$1,100</i>	<i>1</i>	<i>\$1,100</i>	<i>Mfgr DEF, Model# 456</i>
TOTAL VFD WORKSHEET INCENTIVE					
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application.</i>			0	\$0	

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Natural Gas



Please complete the gas equipment incentive worksheet below. Incentives for these measures are only available for projects in participating gas utility territories of NW Natural and Cascade Natural Gas. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the ***New Buildings Participant's Manual*** or call the Program at 1.877.467.0930.

Measure	Minimum Efficiency	Basis of Incentive	\$ Per Unit	No. Units	Unit Input (kBtuh)	Total Incentive	Notes
Domestic Hot Water							
Condensing Tank	91% Thermal eff or AFUE	kBtuh Input	\$2.50			\$0	
Tankless/Instantaneous w/Standing Pilot	70.8% Energy Factor	kBtuh Input	\$1.50			\$0	
Tankless/Instantaneous w/Electronic Ignition	73.8% Energy Factor	kBtuh Input	\$2.00			\$0	
Heating Equipment							
High-Efficiency Unit Heater - Non-Condensing with Electronic Ignition	86% AFUE	kBtuh Input	\$1.50			\$0	
High-Efficiency Condensing Furnace	91% AFUE	kBtuh Input	\$3.00			\$0	
Direct-Fired Radiant Heating	N/A	kBtuh Input	\$6.50			\$0	
Boiler Vent Damper	1000 kBtu input min	No. Dampers	\$1,000			\$0	
High-Efficiency Condensing Boiler with Electronic Ignition (Small: <300 kBtuh)	90% AFUE	kBtuh Input	\$4.00			\$0	
High-Efficiency Condensing Boiler with Electronic Ignition (Medium: 300 kBtuh - 2,500 kBtuh)	90% Thermal eff	kBtuh Input	\$4.00			\$0	
High-Efficiency Condensing Boiler with Electronic Ignition (Large: >2,500 kBtuh)	90% Combust. Eff	kBtuh Input	\$4.00			\$0	
TOTAL NATURAL GAS EQUIPMENT REQUESTED INCENTIVE						\$0	
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application</i>							

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Multifamily and Lodging



Please complete the Multifamily and Lodging incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the ***New Buildings Participant's Manual*** or call the Program at 1.877.467.0930.

Measure	Efficiency Requirements	Installation Requirements	\$ Per Unit	No. Units	Total Incentive	Notes
Packaged Terminal Heat Pump (PTHP)	Please contact the Program to determine model eligibility.	Installed in a multifamily setting.	\$100			
Bathroom Motion Sensor Nightlight		Installed in a commercial lodging.	\$10			
ENERGY STAR® Refrigerators	See Grocery & Foodservice Tab					
Electric Domestic Hot Water (See Note 4)						
Showerheads	Rated at 2 GPM	Installed in either a multifamily, lodging or public assembly setting	\$6			
Aerators - Bath	Aerators rated at 0.5 GPM or lower.		\$3			
Aerators - Kitchen			\$5			
Clothes Washers with Electric Domestic Hot Water (See Note 4)						
Commercial model Modified Energy Factor ≥ 2.0 / WF ≤ 6.0	<u>CEE Tier 2 or 3 qualifying products.</u> <u>See list of qualifying products on CEE website.</u>	Installed in a commercial laundry, lodging, or multifamily building	\$300			
Modified Energy Factor ≥ 2.2 electric dry	<u>See list of qualifying products on ENERGY STAR website</u>	Installed in a multifamily setting	\$75			
Modified Energy Factor ≥ 2.2 gas dry (See Note 1)			\$75			
Gas Domestic Hot Water (See Notes 3 and 2)						
Showerheads - gas DHW	Rated at 2 GPM	Installed in either a multifamily, lodging or public assembly setting	\$6			
Aerators - gas DHW - Bath	Bath aerators rated at 0.5 GPM or lower		\$3			
Aerators - gas DHW - Kitchen	Kitchen aerators rated at 1.5 GPM or 1.0 GPM		\$5			

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Business Energy Solutions—New Buildings
Multifamily and Lodging



Clothes Washers with Gas Domestic Hot Water						
Commercial model Modified Energy Factor \geq 2.0 / WF \leq 6.0 (See Notes 1 and 2)	<u>CEE Tier 2 or 3 qualifying products.</u> <u>See list of qualifying products on CEE website.</u>	Installed in a commercial laundry, lodging, or multifamily building	\$200			
Modified Energy Factor \geq 2.2 electric dry (See Notes 1 and 4)	<u>See list of qualifying products on ENERGY STAR website</u>	Installed in a multifamily setting	\$75			
Modified Energy Factor \geq 2.2 gas dry (See Note 3)			\$75			
TOTAL MULTIFAMILY AND LODGING EQUIPMENT REQUESTED INCENTIVE <i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application</i>					\$0	

Notes:

1. Incentive may be reduced for projects not in participating gas utility territories of NW Natural and Cascade Natural Gas
2. Incentive may be reduced for projects not in participating electric utility territories of PGE and Pacific Power
3. Project must be in participating gas utility territories of NW Natural and Cascade Natural Gas
4. Project must be in participating electric utility territories of PGE and Pacific Power

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Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Grocery



Please complete the grocery incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the *New Buildings Participant's Manual* or call the Program at 1.877.467.0930.

Measure	Requirements	Basis of Incentive	\$ Per Unit	No. Units	Total Incentive	Notes
Refrigeration Systems						
Commercial Electrically Commutating Motor (ECM) Motor for Refrigeration Systems	N/A	each	\$45			
Night Covers - Vertical	Must be applied for at least 6 hrs in a 24-hr period	per linear foot	\$10			
Night Covers - Horizontal			\$10			
Residential Refrigerator	ENERGY STAR®	each	\$50			
Commercial Freezer (0 ft ³ - 36 ft ³)			\$150			
Commercial Freezer (37 ft ³ - and up)			\$150			
Commercial Refrigerator (0 ft ³ - 36 ft ³)			\$150			
Commercial Refrigerator (37 ft ³ and up)			\$150			
Controls: Evaporator Fan - Shaded Pole Walk-in Cooler	Reduce fan motor power by at least 75% when operating at reduced speed	per fan controlled	\$25			
Controls: Anti-Sweat Heat - Medium Temp. (1°F - 35°F)	Install device that reduces energy consumption of anti-sweat heaters by at least 50%	per linear foot	\$40			
Controls: Anti-Sweat Heat - Low Temp. (<0°F)			\$50			
Floating Head Pressure Controls (FHPC)	Select County:	< Select from drop down >	Compressor hp	\$40		
	Select Condenser Type:	< Select from drop down >				
	Requirements: Saturated condensing temperature (SCT) control uses ambient following temperature difference strategy, rather than fixed head pressure (SCT). - Low temp systems must have a TD of 8. - Medium temp systems must have a TD of 13.					

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Business Energy Solutions—New Buildings
Grocery



Floating Suction Pressure Controls (FSPC)	Select County:	< Select from drop down >	Compressor hp	\$15			
	Select Condenser Type:	< Select from drop down >					
	Requirements: - Add FSPC thus increasing the 'suction' pressure when possible to reduce the load on the compressor. Suction pressure will float up as the temperature in the case is met.						
VFD on Condenser Fans	Select County:	< Select from drop down >	Condenser fan hp	\$100			
	Select Condenser Type:	< Select from drop down >					
	Requirements: - This measure constitutes adding a single VFD to control a multi-fan condensing unit. - This measure may not be combined with the Oversized Condenser measure. - VFD needs to be installed on inverter duty rated fan motors						
Oversized Condenser with VFD	Select County:	< Select from drop down >	Condenser capacity (tons)	\$60			
	Select Condenser Type:	< Select from drop down >					
	Requirements: - For air cooled condensers, a TD of 13 must be achieved - For evaporative condensers, a TD of 18 must be achieved - Condenser capacity is limited to 150% of evaporator load						
Lighting							
LED Refrigeration Case Lighting	Low-Temp 18 hr day	Permanently installed fixture	per linear foot -width of display case	\$30			
	Med-Temp 18 hr day			\$30			
	Low-Temp 24 hr day			\$30			
	Med-Temp 24 hr day			\$30			
TOTAL GROCERY EQUIPMENT REQUESTED INCENTIVE							
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application</i>				\$0			

Form 520S
Standard Track Incentive Workbook
Business Energy Solutions—New Buildings
Foodservice



Please complete the foodservice incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier which will link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the *New Buildings Participant's Manual* or call the Program at 1.877.467.0930.

Measure		Efficiency Requirements	Basis of Incentive	\$ Per Unit	No. Units	Total Incentive	Notes
Food Heating							
Electric Convection Oven	Full Size	ENERGY STAR®	each	\$300			
	Half Size			\$300			
Hot Food Holding Cabinet	Full Size			\$400			
	Half Size			\$275			
Gas Fryer (See Note 2)				\$1,000			
Gas Griddle (See Note 2)				\$150			
Gas Convection Oven - Full Size (See Note 2)				\$300			
Electric Steam Cooker				\$1,300			
Gas Steam Cooker (See Note 2)				\$1,300			
Ventilation							
Commercial Vent Hood Gas hot water (See Notes 1 and 3)		Variable Frequency Drives installed on vent hood and make-up air unit	hp (vent fan + make-up air fan)	\$750			
Commercial Vent Hood Electric hot water (See Note 2)				\$750			
Energy Management and Controls							
Restaurant Energy Management System (See Notes 1 and 3)		Approved by Energy Trust	each	\$2,750			

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Business Energy Solutions—New Buildings
Foodservice



Commercial Dishwashers							
Under counter	High temp Gas hot water (See Note 1 and 3)	ENERGY STAR®	each	\$200			
	High temp Electric hot water			\$200			
Single tank door/upright	High temp Gas hot water (See Note 1 and 3)	ENERGY STAR®	each	\$400			
	Low temp Gas hot water (See Note 2)			\$400			
	High temp Electric hot water			\$400			
	Low temp Electric hot water			\$400			
Single tank conveyor	High temp Gas hot water (See Note 1 and 3)	ENERGY STAR®	each	\$500			
	Low temp Gas hot water (See Note 2)			\$500			
	High temp Electric hot water			\$500			
	Low temp Electric hot water			\$500			
TOTAL FOODSERVICE AND LODGING EQUIPMENT REQUESTED INCENTIVE Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application						\$0	

Notes:

1. Incentive may be reduced for projects not in participating gas utility territories of NW Natural and Cascade Natural Gas
2. Only for projects in participating gas utility territories of NW Natural and Cascade Natural Gas
3. Incentive may be reduced for projects not in participating electric utility territories of PGE and Pacific Power

Please complete the ice machines incentive worksheet below. The information provided to the New Buildings program must include the quantity of each type of equipment and the identifier to link the type of equipment to the product data sheets and purchase data. For more information and examples please refer to the ***New Buildings Participant's Manual*** or call the Program at 1.877.467.0930.

Table 1 – Ice Machines Incentives

Equipment Type (air-cooled only)	Ice Harvest Rate (lbs/24 hrs)	Incentive for Tier III Equipment	Incentive for ENERGY STAR Equipment
Self-Contained Unit (SCU)	< 175	\$300	\$200
Self-Contained Unit (SCU)	≥ 175	\$300	\$200
Ice-Making Head (IMH)	< 450	\$300	\$200
Ice-Making Head (IMH)	≥ 450	\$400	\$300
Remote Condensing Unit (RCU)	< 1000	\$300	\$200
Remote Condensing Unit (RCU)	≥ 1000	\$500	\$400

KEY	
	Select from drop-down lists
	Enter data in shaded cells

Table 2 - Ice Machines Incentive Worksheet

Ice Harvest Rate	Equipment Type	Incentive Amount	Qty	Total Incentive	Notes/Model Number
<i>Ex.: 150</i>	<i>Tier III</i>	<i>\$300</i>	<i>2</i>	<i>\$600</i>	<i>Mfrg XYZ, Model 789</i>
Total Ice Machines Worksheet Incentive					
<i>Please attach product data sheets containing Product Model Number, Manufacturer, & Product Specifications to this application.</i>			0	\$0	