



Program Guide for Solar Trade Allies

Developed by Energy Trust of Oregon

Part 3: Residential-Scale Incentive Offers

3.0 **Overview**

This section discusses the various incentive offers available to residential customers.

The Solar program has defined “residential-scale” as simple projects typically sized for a single family home. Multifamily developments typically mean a larger or more complicated installation and are therefore considered “business-scale” by the Solar program (and typically not a Level 1 interconnection application). Business-scale offerings can be found in **Part 4** of the Program Guide.

3.1 **Standard Solar Installation Incentives**

Solar installation incentives help make solar more affordable for customers. Customers receive the up-front benefit of the incentive from their solar trade ally to lower the initial cost of systems, and Energy Trust pays the incentive to the trade ally at the conclusion of the project. For simplicity, the Program offers flat incentives for standard market-rate residential solar customers. The incentives are set in consideration of many factors, such as system costs, project type, available tax credits, market demand and available budget. They are also based on an expectation that each solar system will remain operational for at least 20 years.

Most Energy Trust incentives are funded by the ratepayers of Portland General Electric (“PGE”) and Pacific Power. The funds Energy Trust receives from PGE and Pacific Power are managed separately, and as a result, solar incentive rates and maximum incentive amounts can vary between PGE and Pacific Power customers. Energy Trust sets incentive levels to manage consumer demand such that the Program can continue to accept new project applications throughout the year; however, incentive funding is always subject to availability and the incentive budget for one utility may be exhausted before the incentive budget for the other utility.

To manage its limited incentive funding, the Program makes incentives available using a “step” or allocation system. The Program allocates funds for a given incentive offer and announces what the next step down will be (typically a small incentive reduction) once those funds are exhausted. Timing for incentive changes depends on the level of demand for the current allocation. Depending on demand, the Program may choose to extend the current rate by adding funds to an allocation. Trade Allies can track status of the current incentive offerings and funding allocations using the weekly incentive status report on the Energy Trust Insider [website](#).

Incentive offerings are subject to funding availability and applications are processed on a first-come, first served basis. An application is not considered for funding until a complete, signed application package with all required materials is submitted to Energy Trust. ***The incentive application package must be submitted to program staff BEFORE a trade ally begins installing the system. Projects that have already begun or completed installation without submitting an application are not eligible for incentives.***

3.2 **Solar Within Reach**

Energy Trust has a commitment to diversity, equity, and inclusion, and acknowledges that historic participation in our renewable energy and energy efficiency programs has not extended to all Oregonians. Solar Within Reach was launched in 2019 to help expand access to customers who may be good candidates for solar but might not be able to afford the initial investment. Increased **Solar Within Reach** incentives are available for homeowners with moderate incomes, defined as at or below 120% of the state median income. In 2021, the Oregon state legislature reaffirmed this commitment by passing House Bill 3141, the public-purpose charge modernization bill, which requires that 25% of the funding allocated to Energy Trust's renewable energy programs benefits customers with low to moderate incomes.

Solar Within Reach is ideal for customers who own homes in good condition, but for whom an investment in solar is financially out of reach. It can also be a valuable component for new homebuilders who work with lower-income communities. This incentive offer was developed with expert input from more than a dozen community-based organizations, local governments, and others.

Solar Within Reach has three key features:

- Higher incentives to offset a greater portion of the upfront cost of a project;
- A subset of the highest-performing Solar trade allies who receive training and commit to higher service standards; and
- Targeted marketing campaigns and collaboration with community-based organizations or new community developments.

Only approved Solar trade allies are eligible to offer Solar Within Reach incentives to qualifying customers. Participating trade allies must meet all requirements set forth in **Section 2.6** of this program guide. Participating Solar Within Reach trade allies may submit applications for the Solar Within Reach incentive rate for a residential project for a customer that meets the Solar Within Reach eligibility criteria outlined below.

To apply for incentives, follow the standard incentive application instructions outlined in [Part 5 of the Program Guide](#), and check the box for Solar Within Reach. This will enable the correct incentive rate and forms to be accessible in PowerClerk. Before an incentive can be reserved, a signed copy of the customer's Solar Within Reach Income Verification (*Form 210SWR*) **OR** Solar Within Reach for Builders Qualification Verification (*Form 210B*) must be submitted to EnergyTrust, along with all other required incentive application documentation, as a part of the standard application process in PowerClerk.

The Solar Within Reach trade ally must itemize the Solar Within Reach incentive on the customer's invoice and provide it as an upfront discount on the customer's invoice.

The final determination of eligibility for Solar Within Reach incentives rests with Energy Trust. Energy Trust reserves the right to change incentives at any time.

3.2.1 Solar Within Reach Customer Eligibility Requirements

Homeowners

Prior to performing any Solar Within Reach work or assessments, the approved Solar Within Reach trade ally must confirm income eligibility of the customer using Energy Trust's Solar Within Reach Income Verification (*Form 210SWR*). In addition, the customer must own their home to qualify for Solar Within Reach incentives. Only income-qualified customers are eligible to receive Solar Within Reach incentives. All other Energy Trust eligibility requirements for residential incentive program participation continue to apply.

Builders and New Residential Construction

Prior to performing any Solar Within Reach work or assessments, the approved Solar Within Reach trade ally must confirm with the Builder representative the income eligibility of the end customer and future homeowner of the new residential construction using the Solar Within Reach for Builders Qualification Verification (*Form 210B*).

3.3 **Battery Storage Incentives**

Historically, Energy Trust's solar program was limited in providing incentives beyond those that supported the development and installation of solar projects. House Bill 3141, the public purpose charge modernization bill, passed in 2021, expanded the allowable technologies eligible for incentive funding. Energy Trust's residential Battery Storage Incentives support the installation of qualifying new battery energy storage systems when paired with solar.

The market for paired battery-storage systems is still evolving quickly. Interest in battery storage is growing as customers express desire to meet resilience needs due to the prospect of outages from natural disasters or extreme weather events. Our utility partners are working with customers to identify possible solutions to support a flexible electricity grid by combining paired solar+storage systems with interactive information signals. Energy Trust expects Solar trade allies to help support the advancement of the storage industry and meet these goals.

Eligible Equipment

Equipment eligible for an incentive must be UL9540 certified, have a manufacturer warranty that allows the battery to be used for grid flexibility and time of use arbitrage, and be secured to the home. Refer to the [Solar Insider page](#) for a list of up-to-date program requirements that battery energy storage systems must meet in order to receive incentives.

Trade allies are responsible for determining which battery systems qualify. They may reach out to Energy Trust at solar@energytrust.org in advance of applying for a new project if they are unsure if any new systems/components meet qualification criteria.

The market for battery storage includes a wide variety of available code-compliant technologies, however Energy Trust will only provide incentives for qualifying battery energy storage systems that are capable of supporting resilience and grid flexibility goals described above.

Incentive Offers

Energy Trust will provide incentives based on available budget and market demand. Incentives will support the installation of new qualifying battery energy storage systems when paired with new or existing solar installations. Battery storage incentives will be applied in the same structure as residential solar incentives, with customers receiving the benefit of the incentive upfront, and the incentive paid to trade allies at the conclusion of the project. The final approved battery incentive shall never exceed the total system cost. Projects with Battery Energy Storage Systems may receive a design review and installation verification.

All Solar trade allies in good standing are able to offer Battery Storage Incentives for standard customers. Trade Allies who qualify for Solar Within Reach incentives are also able to offer increased incentives for battery storage. Please refer to the [Solar Incentive Status Report](#) for current incentive availability.

3.4 Solar Ready

Energy Trust's Solar Ready programs are intended to support designers and builders in implementing solar ready features in new construction. Energy Trusts offers technical assistance and incentives to reduce the cost of constructing new homes and buildings with solar-ready features. These programs are available for both residential and commercial projects, managed by the Energy Trust New Homes and the Energy Trust New Buildings programs.