



# **Program Guide for Solar Trade Allies**

**Developed by Energy Trust of Oregon**

## **Part 4: Business-Scale Incentive Offers**

## 4.0 Overview

Part 4 of the Program Guide discusses the various incentive offers available to “business-scale” customers. The Solar program has defined “residential-scale” as simple projects typically sized for a single-family home. Residential-scale offerings can be found in [Part 3 of the Program Guide](#). 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).

### 4.1 Standard Solar Installation Incentives

Solar installation incentives help make solar more affordable for businesses. Business incentives are different from the Residential incentive program, which are always paid to the *trade ally* at the completion of the project. Instead, business *customers* can elect to receive the payment directly at the completion of the project. Business incentives are capacity-based or size-based, and scale up as the system gets larger, up to a project incentive maximum.

Most businesses served by Portland General Electric (PGE) and Pacific Power (PAC) are eligible for standard solar installation incentives. Some very large energy users in the state elect to “self-direct” their public purpose charge contribution, which impacts their eligibility for Energy Trust incentives. If you think a potential customer might fit this description, please reach out to program staff at [solar@energytrust.org](mailto:solar@energytrust.org) prior to proceeding with the project to verify incentive eligibility.

The maximum eligible project size for all business customers is  $\leq 360$  kW-AC (about 480 kW-DC).

The funds Energy Trust receives from PGE and Pacific Power are managed separately and solar incentive rates and maximum incentive amounts can vary between PGE and Pacific Power businesses. Energy Trust sets incentive levels and manages the annual budget based on consumer demand and program goals. 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 posts future incentive rates and steps 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.***

### 4.2 Equitable Solar Initiative: Tribes, Qualifying Nonprofits, and Affordable Multifamily Incentives

Helping the entities that serve and support lower-income customers, communities of color, and rural communities is an important way to overcome awareness barriers and foster access. As part of the ***Equitable Solar Initiative***, Energy Trust offers increased incentives for eligible customers as a way of combatting some of the additional financial and market barriers to installing solar.

Solar trade allies can submit applications for a higher-than-standard **Equitable Solar Initiative** incentive rate for a new solar project for an eligible nonresidential, institutional, or multifamily host customer that meets the **Equitable Solar Initiative** eligibility criteria outlined below.

All of Energy Trust's program procedures for project application submission, review, installation, and verification apply for **Equitable Solar Initiative** projects. To access the increased incentive for an eligible customer project, trade allies must additionally submit an **Equitable Solar Initiative Eligibility Attestation (Form 210SE)**, signed by the customer, with the application package. This form must be included at the time of incentive application submission and kept with the project record.

**Equitable Solar Initiative** incentives are available on a first-come, first-served basis and are subject to change and availability. Incentive rates will follow standard program procedures and will gradually reduce over time; however, due to Energy Trust's limited budget, these increased **Equitable Solar Initiative** incentives may not remain available year-round. Energy Trust will announce all available incentive allocations, rates, and project caps for increased incentives at the beginning of each calendar year.

Energy Trust will not maintain a waitlist. Trade allies can monitor all incentive rates and availability by viewing the [Solar Status Report](#), which is updated weekly.

#### 4.2.1 Equitable Solar Initiative Customer Eligibility Requirements

To qualify for increased incentives, the nonresidential, institutional, or multifamily customer (System Owner if submitting a **Form 220C**, or Host if submitting a **Form 220T**) must satisfy one of the additional eligibility criteria below, as indicated on the customer's signed **Equitable Solar Initiative Eligibility Attestation (Form 210SE)**.

- **Tribes:** Owned and operated by a federally recognized tribe.
- **Affordable Multifamily Property:** An affordable multifamily property where at least 50% of the property's dwelling units associated with the project are and shall remain dedicated for residents who are at or below 80% Area Median Income (AMI) for at least ten years after project completion.
- **Qualifying Nonprofit Organization:** Owned and operated by a 501(c)(3) nonprofit organization that (i) is registered with the Oregon Secretary of State, Corporation Division, (ii) is not identified on the Oregon Department of Justice list of "Disqualified Charities," and (iii) has a stated mission and track record of delivering programs directly benefiting communities and individuals including, but not limited to, Black, Indigenous, and other communities of color, communities experiencing lower incomes, federally recognized Indian tribes, rural communities, coastal communities, communities with limited infrastructure, and other communities and individuals traditionally underrepresented in public processes and programs to incent and advance solar energy installations.

Other eligibility requirements for program participation include:

- Electric utility must be PGE or Pacific Power
- Maximum project size: ≤360 kW-AC (about 480 kW-DC)
- Project cannot have an existing incentive reservation with Energy Trust

- Installation site may be existing or new construction
- Maximum incentive provided by Energy Trust shall not exceed 75% of the eligible Total Project Cost

#### **4.2.2 Applicable Forms**

##### *Direct-Owned Commercial (Form 220C)*

The system owner is either (i) the owner of the site property, or (ii) a tenant who has received written permission from the property owner to install and operate the system at the site (requires submission of the Owner/Lessor Addendum).

The system owner is further identified as either a for-profit business or non-profit/government/school, and incentive rates may differ depending on the categorization.

The power produced by the solar system will be net-metered to a utility account held by either the property owner or a tenant.

##### *Third Party-Owned Commercial (Form 220T)*

The system owner is a third party (i.e. not the utility customer) with a written agreement to deliver the solar system's power to a host who is either (i) the site property owner, or (ii) a tenant who has received written permission from the property owner to have the system installed and operated (requires submission of the Owner/Lessor Addendum).

### **4.3 Solar Development Assistance and Battery Storage Development Assistance**

The Solar Development Assistance (SDA) incentive supports qualifying nonresidential customers through the early stages of developing a solar system. The Battery Storage Development Assistance (BSDA) incentive supports qualifying nonresidential customers through the early stages of developing an advanced battery energy storage system that is paired with a solar system. Advanced battery energy storage systems are capable of providing additional services to both the customer and the utility grid in addition to providing backup power during an outage.

The SDA and BSDA offerings are intended for complex projects with long construction timelines that would benefit from receiving a financial incentive prior to construction. The incentive is available for a limited set of specific customer and project types, detailed in **Section 4.3.1** below. The incentive offsets the cost of developing a *Solar* or *Solar + Storage Feasibility Report* ("Report") for the customer. This site-specific Report is more expansive than a standard incentive application package and includes a solar site evaluation, preliminary system design(s), initial engineering, and enough utility interconnection due diligence to ensure a solar system is technically and financially feasible.

After completing the Report and the SDA process, the qualifying customer and trade ally can then submit an application for solar installation incentives if they choose to proceed with installation. Some customers may require a detailed Report in order to support the

next phase of their project for their contractor procurement requirements and may not be ready to move forward with an installation incentive process, but the SDA offering is an important tool to support their needs.

Funding amounts for the SDA and BSDA offers are available on the Energy Trust [website](#).

#### **4.3.1 SDA Customer Eligibility**

SDA applicants are only eligible to receive one SDA and one BSDA incentive per site and must not have received an SDA for the site before or have an active solar incentive application open for the same project.

To qualify for the SDA incentive, the project site and the proposed solar system must be capable of meeting Energy Trust's [Solar + Storage Design and Installation Requirements](#), the planned solar system must be roof mounted, and the site must have at least 1,500 square feet of contiguous, unobstructed and unshaded roof area (except with prior program approval). The Project Owner must be an eligible non-residential customer and the owner of, or otherwise have legal rights to install the proposed solar system at, an eligible Oregon site and meet one or more of the following additional criteria (except with prior program approval):

##### *Nonprofit/Tribal/Governmental Project*

Project Owner is a governmental entity, tribe, or nonprofit entity.

##### *New Building Project*

Project Owner's proposed new construction or major renovation building project is enrolled in [Energy Trust's New Buildings program](#) and is in early design phase (when changes can still occur).

##### *Utility Grant Applicant*

Project Owner is a non-residential customer pursuing a PGE or Pacific Power utility grant during a future grant application-cycle.

##### *Solar + Storage Project*

Project Owner is a nonresidential customer considering a solar + storage system. BSDA on its own (without accompanying SDA incentive) is only available to Project Owners considering adding battery storage to an existing solar system.

#### **4.3.2 SDA/BSDA Process Overview**

Solar trade allies should apply for and reserve the SDA incentive on behalf of their customers prior to beginning work to develop the Report. Once the SDA/BSDA incentive has been reserved, Solar trade allies can begin work. Once complete, the trade ally submits the full report to Energy Trust for technical review to determine if the project meets all program requirements. Trade allies are expected to reduce the upfront cost of their services to the customer by the amount of the SDA incentive. The SDA incentive will be paid to the Solar trade ally after the Report has successfully passed technical design review and been approved. The process is described below and summarized in Figure 1.

### *Before beginning solar development work*

Solar trade allies will use [PowerClerk®](#) to complete an SDA/BSDA incentive application on behalf of the customer and submit all required documentation.

- Submit a signed SDA/BSDA Incentive Application (**Form 230D**). PowerClerk® will append the appropriate Report Checklist (“Checklist”) to the application based on project type. These checklists can be found in [Appendix B](#).
- Submit bid for services to complete a Report that meets all SDA Program requirements for the project. The bid for services must show that the customer receives the benefit of the SDA incentive upfront and should cover the development cost of all materials included on the Checklist.

Once approved, a reservation letter will be issued and sent to the Project Owner and the Solar trade ally.

### *Begin work on Report*

The trade ally will have nine months from the date the SDA reservation letter to complete and submit a Report that meets Energy Trust requirements. This is known as the SDA Incentive Reservation Period, and failure to submit a completed Report within the allotted time may result in cancellation of the incentive funding.

### *Submit Report and all required documentation for review*

The trade ally will submit the Report through [PowerClerk®](#) and will include all required documentation as outlined in the [Checklist](#) for the appropriate project type. If an incomplete or ineligible report is submitted, EnergyTrust will notify the trade ally and will not continue with the payment process unless the report is corrected within the Reservation Period. If the report is complete the solar program will begin technical design review to determine if the project meets [Energy Trust Solar + Storage Design and Installation Requirements](#).

### *SDA incentive payment*

SDA incentive funds will be paid directly to the trade ally once the project passes Energy Trust’s technical design review and is shown to meet all solar program requirements and all required documentation is provided, including invoicing that indicates the customer received the benefit of the SDA incentive as an upfront discount. Reports that are not complete and/or do not meet Energy Trust’s requirements will not receive an incentive.

Incentive payments are approved weekly, and incentive checks are typically mailed within 30 days of Energy Trust’s receipt and approval of all required documentation.

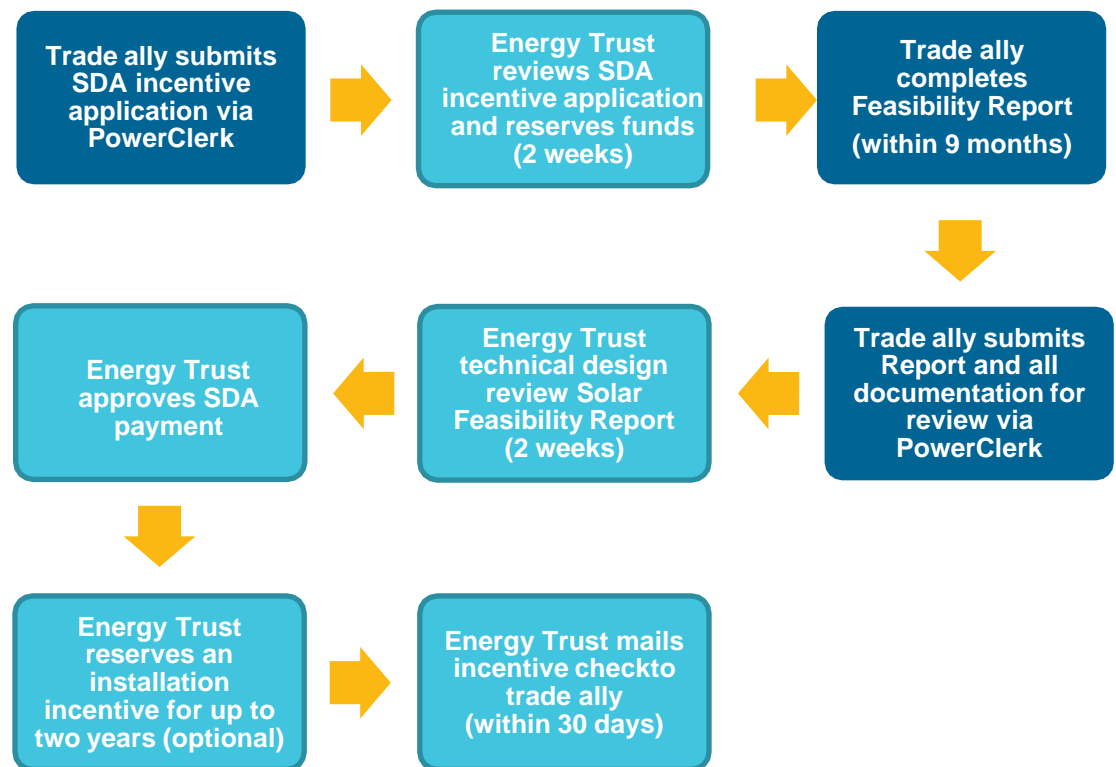
Note: A customer may request a system design that does not qualify for an installation incentive due to exceeding the maximum eligible system capacity of 360 kW to meet their goals (i.e., how much solar can fit on the roof?). This design will still be eligible to receive the SDA incentive payment, but the trade ally is responsible for informing the customer that, if installed as designed, the system will not be eligible to receive an

installation incentive from Energy Trust.

#### *Installation incentive reservation*

Once the Report has been completed by the trade ally, the solar potential of the site should be well understood. When the trade ally submits the Report to the Program for review, **the customer and trade ally may choose to also submit a solar installation incentive application to apply for a full standard incentive.**

Customers proceeding through the SDA pathway are eligible to receive a **two-year reservation period**. If they choose to apply later, the trade ally and customer will be required to resubmit all project documentation and will be limited to a **one-year reservation period**.



**Figure 1. SDA review and incentive payment process**

#### **4.3.3 Solar or Solar + Storage Feasibility Report Required Documentation**

The completed Required Study Documentation for all projects must include the documents detailed in the Report Checklist. The Report Checklist, including checklists specific to each project type, can be found in [Appendix B](#) of the Program Guide.

#### **4.4 Solar-Ready**

Energy Trust's Solar-Ready program is 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 buildings with solar-ready features. These programs are available for commercial projects, managed by the Energy Trust New Buildings program. For commercial projects, there are two Solar Ready incentives: Early Design Meeting Solar Add-On, and the Solar Ready Construction Incentive.