



Program Guide for Solar Electric Allies

Developed by Energy Trust of Oregon

Appendix B: Solar or Solar + Storage Feasibility Report Required Documentation

B.1 Required Documentation

The completed Required Study Documentation for all projects must include the documents detailed below. Since BSDA only applies to storage systems that are paired with solar, Solar + Storage Feasibility studies include all of the elements for Solar Feasibility Studies plus the additional Solar + Storage addendum described below.

System Design Documents include, at a minimum:

- Electrical schematic diagram**
- Physical layout diagram**
- Solar Resource Assessment**

System Proposal Documents include, at a minimum:

- Executive summary** - including a description of key findings, description of how and when the solar analysis was conducted, description of Project Owner's motivation for pursuing the project, and an anticipated timeline for project completion
- Financial summary** - estimated cost, including any estimated tax credits, accelerated depreciation, grants, and potential Energy Trust incentives, as may be applicable to the proposed system installation. Include one or more of the following financial metrics over a 10-30 year basis: simple payback, modified internal rate of return, net present value, savings to investment ratio or return on investment
- Permitting, zoning, and interconnection considerations** - A brief outline of any design, permitting, zoning, structural, electrical, or interconnection considerations that may affect the potential system design, project timeline or installation cost
- Additional Findings** – provide copies of any associated additional documentation including structural engineering report, roof life assessment, permit application, utility interconnection application, etc. including unlocked versions of any underlying models, spreadsheets or other analysis created or prepared as part of or in support of the feasibility study

Energy Trust Incentive Documents include:

- Final SDA Invoice** – Solar Electric trade ally's final itemized invoice(s) detailing the final, total Study costs, subtracting the anticipated Energy Trust Solar Development Assistance incentive, and identifying the remaining net, or out of pocket, cost paid to Solar Electric Trade Ally by Project Owner

New Buildings Projects must also include:

- Energy Trust New Buildings Enrollment** – (Form 510A)

Utility Grant applicants must also include:

- Utility Grant Letter of Intent** – Project Owner must provide written confirmation to Energy Trust of their intent to pursue a utility grant with Portland General Electric (Renewable Development Fund Grant) or Pacific Power (Blue Sky Community Development Fund Grant), and the application window in which they intend on applying.

If Applicable, Solar + Storage Projects must also include:

- **Solar + Storage narrative addendum** (can be included in Executive Summary above) – detailed summary of the following:
 - Description of how and when the solar + storage analysis was conducted.
 - Description of the customer motivation for choosing to pursue solar plus storage for their project and how the motivation is reflected in the design. If multiple scenarios were modelled documentation of each shall be included.
 - Analysis of customers electricity consumption and utility tariff rate. Provide a year of electricity consumption with interval usage data where available. For new commercial construction, provide a modelled load profile with 15-minute or maximum 1-hour data.
 - Documentation of the solar system design with a physical layout diagram that accurately describes locations of major system components. Solar + storage system must meet Energy Trust's installation requirements and the battery energy storage system (BESS) must meet Energy Trust's [Battery Storage Incentive Eligibility Requirements](#).
 - Description of the capacity, expected storage potential of the energy storage system, and financial benefit provided by the battery storage for all proposed scenarios. Include documentation or an explanation of your methodology.
 - Description of the potential benefits for the specific solar plus storage equipment chosen in each scenario.
 - Summary of the Energy Storage System use cases that the chosen equipment can provide that have customer benefits. Examples may include but are not limited to: time of use bill management, solar self consumption, demand charge reduction, preventing backfeed to the grid, backup power, etc.
 - Summary of the Energy Storage System use cases that the chosen equipment can provide that have grid benefits. Examples may include but are not limited to: Demand reduction, peak reduction, voltage regulation, frequency regulation, etc.
 - Summary of any other potential benefits that the Energy Storage System can provide.
 - Summary of next development steps Project Owner intends to take or reasons for not proceeding at this time.
- **Unlocked versions of any underlying models** – spreadsheets or other analysis created or prepared as part of or in support of the Study

B.2 Development Assistance Checklists for Specific Project Types

B.2.1 Non-Profit/Governmental Project Checklist

Your solar trade ally will work with you to complete and submit the required documentation for the Feasibility Report to Energy Trust.

In order to qualify for the SDA/BSDA Incentive, the Feasibility Report must include the following:

Solar System Design Documents including:

- Electrical schematic diagram
- Physical layout diagram
- Solar Resource Assessment

Solar System Proposal Documents including:

- Executive summary
- Financial summary
- Completed permitting, zoning, and interconnection applications (or detailed discussion)
- Additional findings
- Proposed Project Timeline (including procurement, if applicable)

Additional Documentation:

- Feasibility Report final invoice (itemized)

Next Steps

When submitting the Feasibility Report for program review, you and your solar trade ally can apply for Energy Trust Installation Incentives (if applicable).

B.2.2 New Buildings Project Checklist

Your solar trade ally will work with you to complete and submit the required documentation for the Feasibility Report to Energy Trust.

In order to qualify for the SDA/BSDA Incentive, the Feasibility Report must include the following:

Solar System Design Documents for all proposed design scenarios including:

- Electrical schematic diagram
- Physical layout diagram
- Solar Roof Area Summary
- Solar Resource Assessment

Solar System Proposal Documents including:

- Executive summary
- Financial summary
- Completed permitting, zoning, and interconnection applications (or detailed discussion)
- Additional findings
- Proposed Project Timeline

Additional Documentation:

- Feasibility Report final invoice (itemized)
- Energy Trust New Buildings Enrollment

Next Steps

When submitting the Feasibility Report for program review, you and your solar trade ally can apply for Energy Trust Solar Installation Incentives (if applicable).

B.2.3 Utility Grant Applicant Checklist

Your solar trade ally will work with you to complete and submit the required documentation for the Feasibility Report to Energy Trust.

In order to qualify for the SDA/BSDA Incentive, the Feasibility Report must include the following:

Solar System Design Documents including:

- Electrical schematic diagram
- Physical layout diagram
- Solar Resource Assessment

Solar System Proposal Documents including:

- Executive summary
- Financial summary
- Completed permitting, zoning, and interconnection applications (or detailed discussion)
- Additional findings
- Utility Grant Letter of Intent
- Proposed Project Timeline

Additional Documentation:

- Solar Feasibility Report final invoice (itemized)

Next Steps

When submitting the Feasibility Report for program review, you and your solar trade ally can apply for Energy Trust Installation Incentives (if applicable).

B.2.4 Battery Storage Development Assistance Project Checklist

Your solar trade ally will work with you to complete and submit the required documentation for the Solar Feasibility Report to Energy Trust.

In order to qualify for the SDA Incentive, the Solar Feasibility Report must include the following:

Solar System Design Documents for all proposed design scenarios including:

- Electrical schematic diagram
- Physical layout diagram
- Solar Resource Assessment

Solar System Proposal Documents including:

- Solar Plus Storage narrative addendum
- Executive summary
- Financial summary
- Completed permitting, zoning, and interconnection applications (or detailed discussion)
- Additional findings
- Proposed Project Timeline

Additional Documentation:

- Solar Feasibility Report final invoice (itemized)

Next Steps

When submitting the Solar Feasibility Report for program review, you and your solar trade ally can apply for Energy Trust Solar Installation Incentives (if applicable).