

CUSTOM INCENTIVES:
WHAT TRADE ALLIES NEED TO KNOW

Custom incentives support energy-efficiency projects that do not fit standard incentive offerings. Because these projects require project-specific analysis to determine energy savings and incentive eligibility, they involve a more detailed review process. Energy Trust of Oregon must review and approve the project before equipment is purchased or installed.

1. **Identify potential custom project**
   Trade ally contractor identifies an energy-saving opportunity that may qualify for a custom incentive.
2. **Submit project information**
   Trade ally contractor or participant provides project details, equipment specifications and estimates to an energy advisor (EA) to begin the custom incentive process.
3. **Complete a Technical Analysis Study (TAS)**
   An EA will connect the trade ally contractor with an Allied Technical Assistance Contractor (ATAC) to conduct a free study to estimate energy savings and potential incentives. After completion, the TAS is submitted to the Existing Buildings Program for review and approval.
4. **Present TAS results**
   The EA and ATAC will present the TAS results to the participant. They will also present the Pre-Bid Project Estimates Worksheet, Form 110C, which includes the estimated project cost and energy savings.
5. **Incentive offer**
   If the participant decides to move forward, they will submit their final chosen bid to their EA and receive an incentive offer. The participant must sign the offer **before purchasing equipment/services.**
6. **Project installation**
   Trade ally contractor completes the installation according to approved project scope.
7. **Submit completion documents**
   Trade ally contractor or participant submits invoices, equipment documentation and any required verification materials.
8. **Final review and verification**
   Existing Buildings program staff verifies installation details and calculates the final incentive. Trade allies should be prepared to assist customers with any additional documentation, equipment information or on-site verification needed.
9. **Incentive payment**
   Incentive is issued after final approval.

Custom project examples

- Chiller and boiler upgrades
- Building automation and controls
- Pump and domestic water system improvements
- Refrigeration system optimization
- Heat recovery system upgrades

TYPICAL TIMELINE

Initial intake review	Technical Analysis Study	Incentive offer	Installation period	Completion review	Incentive payment
Within a few business days of submission	Varies by project complexity, 1-3 months	Issued after the participant has chosen an implementation contractor	Based on participant and contractor schedule, up to 2 years	After all final documents are received, 2-3 weeks	After final approval and processing, 6-8 weeks after installation

** Timelines vary depending on project complexity, completeness of documentation and responsiveness to information requests.*

What trade ally contractors can do to keep projects moving:

- ✓ Submit complete equipment specifications early
- ✓ Provide clear project scope and estimated installation costs
- ✓ Include existing equipment details when available
- ✓ Wait for written pre-approval before starting installation
- ✓ Respond quickly to information requests
- ✓ Notify the program if the project scope, cost or timeline changes
- ✓ Submit final invoices and completion documents as soon as installation is complete



Common documents needed:

- ✓ Participant contact and site information
- ✓ Existing equipment details
- ✓ Proposed equipment specifications
- ✓ Scope of work
- ✓ Contractor estimate or proposal
- ✓ Project cost breakdown
- ✓ Energy-use or operating schedule information, if applicable
- ✓ Final invoice
- ✓ Photos or verification documentation, if requested

Have questions about whether a project may qualify for custom incentives? Email our team at **existingbuildings@energytrust.org** or call **1.866.605.1676.**

EnergyTrust of Oregon

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Energy Trust of Oregon is an independent nonprofit organization dedicated to helping communities thrive through clean, affordable energy for all. We offer services and cash incentives to help more than 2 million participants of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista in Oregon and Southwest Washington save energy and generate clean power. Together, we are advancing a clean energy future that builds resilience, promotes equity and supports economic vitality. **Printed on recycled paper that contains post-consumer waste. 08/26**