

Submission Instructions

A completed, signed **Form 910E: Project Enrollment** must precede or accompany this **Form 930RF: Request for Funding**. Only projects approved for enrollment are eligible for **Request for Funding** review. All terms and conditions of Project Proponent's enrollment agreement for this project apply and govern this **Request for Funding**.

To be considered for project development assistance (PDA) incentives, a **Request for Funding** must be submitted to Energy Trust for review and consideration **before** Project Proponent begins any of the work on an activity that is the subject of the request. Proposed activities cannot already be underway. Energy Trust may request additional information or documentation. Approval or denial of a specific activity for incentive reservation rests solely with Energy Trust. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust.

Energy Trust considers certain activities and costs as **ineligible** for project development assistance incentives, including, but not limited to:

- Purchase of equipment (except for approved metering equipment needed for resource assessments), facilities or investment in a physical asset.
- Purchase or leasing of land or resources
- Permit fees
- Closing costs and other costs involved with finalizing a deal with an investor
- Project Proponent's or owner(s)' own time and materials towards the proposed project development work
- Activities already started or completed
- Proposed projects without any electric generation objectives (except for resilience projects).

Types of Project Development Activities

Project Proponent may request project development assistance incentives for work to be performed by the Project Proponent's third-party consultant(s), not work performed by the Project Proponent. Incentives for approved project development assistance activities are calculated and paid on a reimbursement basis following Energy Trust's review of submitted final completion documentation. Project Proponent is responsible for paying its consultant(s) in full. Typical project development activities include, but are not limited to:

Feasibility Study Assistance: Engaging a consultant to prepare a feasibility study for the project. Elements typically included in feasibility studies include, but are not limited to, resource characterization, a pro forma financial analysis, an assessment of technology options, and interconnection considerations and costs.

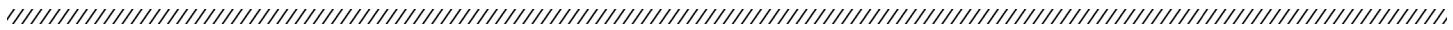
Expert Development Assistance: Engaging a consultant to provide expert assistance related to other project development needs such as design, permitting, utility interconnection, or construction management.

Grant-writing Assistance: Engaging a consultant to complete grant applications for project funding opportunities, such as the United States Department of Agriculture and the State of Oregon.

The maximum cost share that Energy Trust may provide will not exceed 50%, or 75% for state, local or tribal governmental entities or qualifying private resilience projects. Cost share is based on the total documented, eligible project development activity cost. The maximum amount of cumulative project development assistance incentives that Energy Trust will provide towards an enrolled project will not exceed: \$200,000 for renewable electricity generation projects or \$40,000 for energy resilience projects and portfolio solar assessments. Refer to the following table for eligible project types, rates, and PDA limits.

| Project type | Eligibility and Max cost share | Max total PDA incentive |
|--|---|-------------------------|
| Renewable electricity generation: (biopower, hydropower, geothermal, municipal-owned small-scale wind) | Private: 50%; Public/Tribes: 75% | \$200,000 |
| Energy Resilience/Microgrid Development | Public/Tribes: 75% *Private with "community benefits": 75% | \$40,000 |
| Portfolio Solar Assessment | Public/Tribes: 50% | \$40,000 |

* Privately-owned projects will be eligible to receive the Energy Resilience/Microgrid Development PDA option if the resilience project is determined to provide a significant public benefit or critical service to the community. Eligibility will be determined by Energy Trust staff based on the project description in **Form 910E: Project Enrollment** and other submitted application materials.



SECTION 2: Activity Description

Provide a detailed description of the proposal/scope of work for development assistance including key milestones, key decision points, and expected deliverables. Describe the key information you expect to gain or the accomplishments expected to result from each activity. Describe how each proposed activity is important to the forward progress of the proposed project. You may attach additional pages, as necessary. **REQUIRED:** Project Proponent must include a table, consistent with the **Table 1** format below, specifically listing each activity included the proposal/scope associated with this **Request for Funding**.

Provide a budget for the scope of work and an explanation of how costs were calculated. If the request includes multiple activities, please break out the cost of each activity individually. Include any bids for the proposed activities. Please disclose any other outside funding sources supporting your request. You may attach additional pages, as necessary.

Describe how the proposed scope of work fits into the overall project development process and how any other project development activities will be funded. Describe plans for how you will move forward into the design, financing, and construction phase of your project if project development activities prove to be successful.

Please provide the business name and qualifications of the third-party independent consultant(s) who will perform work, unless consultants' qualifications are already on file at Energy Trust. You may attach additional pages, as necessary.

Disclose any actual or potential financial or personal interest that any consultant(s) may have in the proposed project or with Project Proponent (example: part-owner in project, or Project Proponent family member).

