

# Renewable Development Fund

## Q&A

---

**What is the Renewable Development Fund?**

Green Future<sup>SM</sup>'s Renewable Development Fund (RDF) comes from a portion of the money that Green Future customers pay for renewable energy. The RDF offers competitive funding awards to applicants looking to deploy their own clean energy projects.

**How do I apply?**

PGE makes funds available through an open and competitive annual application process. The RDF application, guidelines and funding timeline are available at [PortlandGeneral.com/RDF](http://PortlandGeneral.com/RDF).

**How will my application be evaluated?**

Applications will be reviewed and scored by a committee of PGE representatives and consultants. Applications will be evaluated in accordance with eligibility guidelines, preferred project standards, and established evaluation criteria (subject to the availability of funds). Evaluations are conducted using the information provided via the application form, supplemental materials provided by the applicant, and a phone interview with key members of the project team. All requests for funding and subsequent funding awards are subject to review and approval by the Oregon Public Utilities Commission.

**What are the evaluation criteria?**

Funding from the RDF program is awarded considering the reasonableness of the budget and funding request, the technology, project location, the complexity of the installation, the commitment of the project team and project host, community benefits, potential for public education, project readiness (see below) and the ability of the project sponsor to leverage other funding sources. With the addition of co-funding availability via the Energy Trust of Oregon, all solar projects will be required to apply for, and receive, a commercial Energy Trust incentive.

In addition to submittal of all required application materials before the deadline, evaluators will consider the following criteria when evaluating RDF applications:

Project Feasibility & Readiness:

- Is the proposed technology appropriate for the site?
- Is the proposed technology proven and established? If not, is there R&D value to the project?
- Is the project in line with the mission of the host organization?
- Is there a dedicated project proponent with a long-term stake in the project's success?
- Does the proponent/management team have project management experience?

# Renewable Development Fund

## Q&A

---

- Have contractors been selected and do they have applicable design/construction experience?
- Is the proposed timeline realistic?
- Have potential delay risks been identified and properly mitigated?
- What is the probability of completion within the proposed timeline?
- Has an adequate amount of pre-development work been completed?
- Have all required permits/approvals been accurately identified and applied for?
- Has the applicant had preliminary conversations with the utility regarding net metering and interconnection?
- Are any critical approvals pending or unlikely to be secured?
- Is maintenance of the system properly addressed to help ensure long-term operations?
- Has an O&M service provider been identified, and will the system be monitored/inspected with appropriate frequency?
- Will required spare parts be kept on-site?
- Is there an O&M budget and a plan to fund the budget?

### Community Impact

- Does the project provide strong economic, environmental, and/or social benefits to the project host, the utility, and the local community?
- Does the project help to build regional capability and stimulate the renewable energy marketplace?
- Does the project provide educational or job training opportunities?
- Does the project help build local or regional renewable energy experience/expertise?
- Is there a well-developed plan for using the project to educate the community about renewable energy?
- Is a point person identified to lead the educational effort?
- Is there a detailed plan to recognize the RDF and participating customers?
- Does the project offer unique or new exposure to the RDF?
- Is the project physically visible to the public?
- Is the community aware of and supportive of the project?
- Is it likely there will be actual or perceived negative impacts from the project? Have potential negative impacts been properly mitigated?

### Costs & Financing

- Is the financial structure reasonable and adequate for project completion?
- Does the host organization appear to be financially stable/reliable?
- Does the host organization have longevity (2+ years) at the site?

# Renewable Development Fund

## Q&A

---

- Does the host organization have a plan for retaining or transferring the RECs created by the renewable energy facility? Is the plan reasonable and in line with RDF guidelines?
- Is the total project cost reasonable based on industry norms?
- Were multiple bids received from competitive contractors?
- Does the budget represent the maximum value for the price of the project?
- Are there undue financial risks that would put the project in jeopardy?
- Have potential financial risks been identified and adequate mitigation strategies put in place?
- Are RDF funds required for the project to be successful?
- Has the applicant applied for, and received, an Energy Trust incentive?
- Are there other barriers to the timely release of the funds in order to ensure the original timeline is met?
- Is the proportion of award requested from the RDF reasonable?
- Are there other sources of funding besides the RDF?
- Does the applicant have their own funds or secured in-kind donations?
- Is the budget estimate complete with a reasonable contingency?

### **How much funding is available?**

Award funding is limited and will differ from project to project based on applicant request and available funding. Up to 85 percent of eligible project costs can be covered by all outside funding sources (RDF, Energy Trust of Oregon, Oregon Department of Energy, etc.) with the remaining 15 percent funded by the applicant. Note, all solar projects require funding from the ETO. Total funds available for disbursement in each funding round will be determined by PGE and made known at the outset of each funding round. No single applicant or project will be eligible to receive more than 33 percent of the total RDF balance available in each funding round. Additionally, the 1.5% Green Energy Technology cannot be funded by the RDF.

### **How often will funding be offered?**

PGE intends to award RDFs on an annual basis. This funding schedule is subject to change.

### **When does my project need to be completed?**

Projects must be completed and delivering power within 18 months of funding approval. Extensions may be considered on a case-by-case basis.

### **If I've applied for funding in the past, can I apply again?**

Yes, you can apply even if you been approved or denied for funding in the past. However, PGE may choose to prioritize new applicants in future funding rounds. Applicants will be evaluated on an individual basis.

# Renewable Development Fund

## Q&A

---

### Questions from Applicant Submissions

***If you want to put solar on the roof, but the roof first needs to be replaced, does the RDF help with the replacement costs?***

No, the RDF will not help with retrofitting or structural costs. See [Eligibility Guidelines](#) for more details.

***Can you give a sense for how much battery backup boosts the score of the grant application?***

Battery backup is considered as part of community or economic benefits. If you are including battery backup, tell the story of how it will provide additional benefits.

***Is there a minimum or maximum project size?***

The RDF will fund any size project up to 10MW. Only commercial projects are eligible for funding.

***Can we oversize an array for multiple sites?***

The only way an oversized array would work for multiple sites is if they are all on the same meter or metered together. If they are separately metered, then this will not work because even though an oversized array can still be done, the extra usage would go back into the grid and not to the other sites.

***Can you apply for funds after a project has been completed?***

No, projects cannot be completed.

***How do SDA (formerly feasibility studies) projects play into transitioning over to RDF grants? Is that possible? Can we plan for applying next year under a similar-style program if we miss the cut-off?***

If the project is already in development, you are still eligible to apply for the RDF. However, if you are still in the appraising stage and you don't think the project will be fully vetted by the application deadline date and the timeline allows, it's suggested to hold off on applying until next year's round to ensure the application is as complete and thorough as possible.

***At what point is the agreement signed?***

The agreement is signed after approval from the Oregon Public Utility Commission, typically in late fall.

***Do we have to demonstrate 3 bids?***

No, there does not need to be a demonstration of 3 bids, however it is usually best practice to get multiple bids to ensure the project cost is in-line with industry standard.

***What percentage of the funds are selected by renewable category?***

Funding disbursement is not based on renewable type.

***If I have multiple sites/projects by the same organization, is it better to divide them amongst numerous applications or group them all into one application?***

We will evaluate separate applications separately and score them based on their individual

# Renewable Development Fund

## Q&A

---

characteristics. Either option is permissible. This more of a case-by-case basis.

### ***What is the Green Energy Technology (GET) criteria?***

The GET is a requirement put in place by the state of Oregon that requires public projects that cost \$1,000,000 or over to set aside 1.5% of the cost for green energy technology. The RDF will fund up to 85% of any renewable technology, which means:

- If a project costs \$1,000,000, then 1.5%, or \$15,000 is a required amount for green energy technology. If the project chooses to stay at the \$15,000 minimum, the RDF will not be eligible as it is a requirement by the state. However, if the project chooses to go above the minimum and installs a \$50,000 array, then \$35,000 is eligible for 85% funding from the RDF (\$50,000 - \$15,000 minimum requirement = \$35,000). That means that up to \$29,750 of \$50,000 is eligible for reimbursement.

Remember, the Green Energy Technology requirement is for public projects \$1,000,000 or over.

### ***Can RDF funding go towards covering the 1.5% for Green Energy Technology (GET) requirement costs?***

No, the RDF will not go towards the 1.5% GET requirement, only the amount above the 1.5% requirement.

### ***We are installing more than the 1.5% required solar so will not pay the tax, we will install. Do we subtract the 1.5% off the top of our renewable cost portion?***

The 1.5% Green Energy Technology requirement applies to public entities and would not be considered for private projects. If your project is larger than the GET requirement, you can apply for the amount not funded under GET. For more information on the Green Energy Technology requirement, please visit the State of Oregon's website at <https://www.oregon.gov/energy/energy-oregon/pages/get.aspx>.

### ***Can the 1.5% could be accounted for in our other project costs?***

No, the 1.5% cannot be accounted for as "Other Project Costs" on the application. Please submit the full project costs, and not the portion funded under the 1.5% requirement in your funding sources.

### ***Can co-funding include C\_PACE?***

Yes.

### ***If the 85% fund cannot be met, will the RDF give us a lower alternative percentage?***

We expect eligible applicants to fund at least 15% of the total eligible product costs. Projects that are unable to bring 15% are not eligible for an award.

### ***Is the length of time for the rate of return on investment a requirement? Does it affect the application?***

The application does not ask for a rate of return on investment. PGE considers overall cost effectiveness of the project. If energy savings provide a community or economic benefit, they may be considered.

### ***Is the 18-month duration negotiable?***

If at the time of the application you know that the timeline will be past the 18-month

# Renewable Development Fund

## Q&A

---

duration, we encourage you to include that in the application. Projects will not be penalized for being upfront with this information.

***If the project is over 18 months before its online, does it decrease points for grant application?***

The 18-month timeline is an eligibility criterion, so you must discuss the timeline with PGE prior to applying. If the longer timeline is approved, it will not decrease points directly. However, projects will be scored against the same readiness and feasibility criteria regardless of the timeline. If you think your project is going to be longer than the 18-month requirement, please include that in the application along with the reason why.

***If I do not request the full 85% funding request, does it change the review process to be more favorable?***

Yes, projects that provide more than the required 15% funding will score more favorably during evaluation.

***Does a project asking for 50% funding get more points than a project asking for 85%?***

Yes, a project will receive additional points for requesting a lower percentage amount, however, it does not make a project ineligible to apply for the full 85%.

***Is all in-kind funding ineligible?***

Applicants may receive in-kind contributions, but they cannot be counted towards any portion of the budget or funding sources. If you are receiving in-kind funding, please highlight this in the narrative on the application.

***In addition to energy capital projects and renewable energy education programming, is the grant available to fund renewable and/or sustainability program staffing (FTE) like educators?***

No, this funding is not available to fund full time renewable and/or sustainability program staff. However, short-term contract labor or staffing – specific to developing the educational programming component of a clean energy project – may be considered. For example, funding may be considered for a short-term consultant to help the applicant develop a public display to educate the community about the clean energy project.

***Are projects that also receive any Energy Trust of Oregon incentives eligible? Is there a limit to how much?***

Yes. As of July 2017, all RDF applicants are eligible and expected (with solar projects) to apply for Energy Trust incentives.

***Can for-profits use both the ETO and RDF funds together?***

No. For-profits can only use one or the other. If you are installing solar, the RDF will still require that you reach out to the ETO for incentives, but it will ultimately be up to the project which grant to use (ETO or RDF, if approved).

***If a project doesn't qualify for the ETO incentive due to self-directed funds, such as a large energy consumer, could it still qualify for the RDF?***

Yes.

# Renewable Development Fund

## Q&A

---

***Will PGE refer agencies considering an application to trade allies?***

If you are seeking an installer, please visit the Energy Trust of Oregon's website at <https://www.energytrust.org/>.

***Is the grant award based on an "all or nothing" scenario--or may the evaluation team opt to award a portion of the funding request?***

The grant award may opt to fund a portion of the funding request.

***Will a project that is "solar ready" be more favorable?***

Projects identified as "solar ready" should explain what measures make it solar ready and how those improve project feasibility.

***I would like to install solar PV panels that also produce solar thermal, though the program says that thermal solar systems are not eligible. So, I'm curious, would a PVT system be eligible, since it does produce electricity?***

For a combined solar photovoltaic and solar thermal system (PVT), only the photovoltaic portion that has the potential to produce electricity would be eligible for an RDF grant.

***Any buy America requirements or union labor requirement?***

There are no requirements for union labor or buy America, but there is a preference for using local contractors which shows on the evaluation. The contractor must be an Energy Trust of Oregon Trade Ally.

***Is there a preference for panels made in the Pacific Northwest (WA or OR) on grant application points?***

While panels made outside of the northwest are acceptable, there is a local economic benefit for using local materials and that will positively impact the application scoring.

***Can you provide any guidance relating to financing the project? Specifically, does the RDF team expect applicants to cost share? On other applications, we've historically seen some guidance as to what the organization deems reasonable (i.e. a percent cost split, say 80/20 financing between grantor and grantee). Does the review team want to see financial skin in the game, or is it reasonable to request funding for the upfront construction costs?***

The RDF doesn't fund 100 percent of a project cost and we expect applicants to contribute to the funding of their project and/or look at other funding sources. We expect applicants to fund at least 15 percent of the total project costs. Please see the Eligibility Guidelines at [PortlandGeneral.com/RDF](http://PortlandGeneral.com/RDF) for further guidance on project requirements and funding priorities.

***Can USDA REAP grant projects also apply for RDF? If they apply for both grants? If so, how would that work on 15% / 85%?***

Yes, projects that apply for the USDA REAP grant can also apply for the RDF. As a point of clarification, all outside funding sources (other grants, incentives, tax credits and the RDF) will need to make up the 85%. The remaining 15% needs to be funded by the project (this can include loans or other mechanisms).

# Renewable Development Fund

## Q&A

---

***I'm planning to submit a proposal to the RDF Request for Proposal (RFP). We are filling it in on the Word file. Do [you] want the submission to also be in Word, or is PDF OK?***

Both are fine.

***How does the Portland Clean Energy Fund play into this at all? Does it? Will RDF funds increase next or in future years and income comes in from that measure?***

No, the Portland Clean Energy Fund and the RDF are separate programs. The RDF is made possible because of customers enrolled in PGE's Green Future<sup>SM</sup> program. Any new funding would not come from the Portland Clean Energy Fund.

***How does Community Solar work with the RDF?***

We don't know yet. We're in the process of working through that and hope to know later this year.

***Under Appendix B: Supplemental Document Checklist, it stipulates that we need to provide a "credit report" as part of our previous three years of audited financial reports. As a 501(c)3 nonprofit organization, we do not pull credit reports, and our finance team is unfamiliar with this type of attachment request. Could you provide more guidance on what you are looking for? We have complete audited financials that we will be attaching to our application, which provide a clear picture of financial health and stability. If necessary, we could also pull a Dun & Bradstreet report, which would confirm our financial stability.***

As a 501(c)3 your submission of three years of audited financial reports per the Appendix B Document Checklist addresses the Proof of Financial Health if the requested details are present. A Dun and Bradstreet report can be a substitute for a credit report. Please note that Appendix B is only for projects greater than 500kW. If your project is below that size, only Appendix A is required.

***What is PGE's vision for community education on renewable energy? (We imagine a cohesive message is desirable across a number of organizations who receive funds from this initiative, and if there are any examples beyond the links on the website.) What form of recognition would PGE/The RDF find most effective for your community outreach purposes?***

Inasmuch as there will be a variety of submitted projects that also vary in capacity, location and application – it is left to the applicant to assess and put forth its best community education proposal (see [Application form](#) – Questions 6, 7, 8 and 9 – also see [Award Recipient Requirements](#) for additional details). However, all public-facing communication from the applicant should be approved by the PGE Product Marketing team prior to its disbursement. Please send communications to the RDF Project Manager at [RenewableDevFund@pgn.com](mailto:RenewableDevFund@pgn.com) at least three weeks before posting/publication date.

***Are there any helpful lessons learned from previous applicants or projects?***

In general, the best way to create a positive process for any project, but especially should it be awarded RDF funding, is to ensure that it is delivered on schedule, on budget and functions per design. Also important is to obtain community feedback ahead of time and create a positive environment with the community where you are building.

***Per the direction in the RFP we plan to submit via email, however I'm anticipating the***

# Renewable Development Fund

## Q&A

---

***package may be more than 10 MB in size, which may cause some problems with email transmittal. Are there acceptable alternative methods to transmit electronically if this is the case?***

Should the submission email exceed a file size limitation, the applicant should send it in separate emails, but have it clearly labelled as “1 of 2”; “2 of 2” or the like.

***In helping various housing providers explore solar and develop their grant applications, we've come to two scenarios needing clarification for PGE's RDF opportunity:***

- *A multifamily affordable housing facility is master metered, where the load served is a mix of residential apartments and commercial common areas, such as street lighting, AC, and elevators. An interconnected solar project would lower bills for the housing provider.*
- *A multifamily affordable housing facility is individually metered, with a mix of apartments and commercial meters. Individually interconnecting small solar arrays to tenants' meters would provide direct energy benefit to the low-income residents.*

***If you could provide any clarification as to eligibility of multifamily projects, it would be much appreciated.***

PGE will evaluate each project on its merits and in compliance with the RDF guidelines. Multifamily projects are eligible for funding from the RDF. We recommend working with PGE's [interconnection team](#) as early as often as possible.

***When is contact with PGE's interconnection team required?***

Preferably you should contact interconnection before submitting an application, particularly if there are special circumstances, but it is not required. You can find more information online at <https://www.portlandgeneral.com/business/power-choices-pricing/renewable-power/install-solar-wind-more/solar-costs-incentives>.

***What makes an application better than others?***

Please see the “[Award Recipient Requirements](#)” for details.

# Renewable Development Fund

## Q&A

---

### **Helpful Links**

- Green Future Renewable Development Fund
- [The Database of State Incentives for Renewable Energy](#) (DSIRE), a comprehensive, user- friendly and free source of information on state, local, and selected federal incentives that promote renewable energy.
- The [PGE Install Solar, Wind & More](#) page provides information regarding generating your own power, net metering, and interconnection requirements.
- The Department of Energy's [Solar Energy Resource Center](#) provides numerous tools, templates, and guides to help communities accelerate adoption of solar energy.
- [USDA Renewable Energy Grants for Rural Communities](#) - information regarding the eligibility requirements and applying for project funding through the USDA's Rural Energy for America program.
- [Renewable Energy RFPs](#) – The US Department of Energy lists solicitations and a variety of information for green power markets.
- [Energy Trust of Oregon](#) – Connections to Trade Allies in Oregon and more information on other energy-related efforts. For a solar contractor, use their Solar Bid Form.

*Additional questions not covered here?*

Please direct your questions to [RenewableDevFund@portlandgeneral.com](mailto:RenewableDevFund@portlandgeneral.com).