

Frequently Asked Questions

What is the PGE Renewable Development Fund?

The PGE Renewable Development Fund (RDF) provides financial support for local renewable energy projects using a portion of the money that PGE Green FutureSM customers pay for renewable energy. The RDF offers competitive funding awards to applicants looking to deploy their own clean energy projects.

Process Overview

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.

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.

Is there a minimum or maximum project size?

The RDF will fund any size project up to 10MW. All non-residential projects are eligible for funding.

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?

Either option is permissible. We will evaluate each application separately and score them based on their individual characteristics.

Is the 18-month duration negotiable?

If at the time of the application you know that the timeline will be past the 18-month duration, we encourage you to include that in the application. Projects will not be penalized for being upfront with this information.

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

Yes, you can apply even if you have been approved or denied funding in the past. However, PGE may choose to prioritize new applicants in future funding rounds. Applicants will be evaluated on an individual basis. If you're planning to reapply for a solar project, you will need to work with your Solar Trade Ally contractor to check-in with the Energy Trust of Oregon to ensure all system design, cost, and incentive information remains accurate.



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?

A Word file is preferable.

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? If a cohesive message is desirable across the different organizations who receive funds from this initiative, are there 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@pqn.com at least three weeks before posting/publication date.

Evaluation and Scoring

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 finding awards are subject to review and approval by the Oregon Public Utilities Commission.



What are the evaluation criteria?

Funding awarded from the RDF program considers the reasonableness of the budget and funding request, technology, project location, complexity of the installation, commitment of the project team and project host, community benefits, potential for public education, project readiness (see below) and ability of the project sponsor to leverage other funding sources. With the addition of co-funding availability via Energy Trust of Oregon, all solar projects will be required to apply for, and receive, a Solar Development Assistance (SDA) incentive to help pay for development pre-work and reserve an installation 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?
- 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?
- Does the project provide a majority of its benefits to underserved communities?

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?
- 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?

Funding

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.



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 Energy Trust of Oregon. 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.

How often will funding be offered?

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

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

No, projects cannot be completed prior to the RDF application being submitted. The award cannot be applied retroactively to existing projects.

What percentage of the funds are selected by renewable category?

Funding disbursement is not based on renewable type. Please see the RDF Guidelines document for more details on eligible energy types.

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.

Can co-funding include CPACE?

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.



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.

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 installation 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 installation incentives.

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.

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 for further guidance on project requirements and funding priorities.

Could an organization also seek outside grants in addition to the RDF grant? Could those grants be part of the 15% an applicant brings to the table?

Please do! This is encouraged. We think a diversity of funding sources makes an application that much stronger and allows our funding to go further. An applicant will still have to fund 15% of the project costs, regardless of the other types of funding they’ve secured.



Is there an application advantage to applying for less than 85% funding?

The RDF has a stated preference for applications requesting less than the maximum available. Projects are viewed more favorably if they are able to secure funding from other sources and/or fund more than 15% of eligible costs.

Can the 15% from the organization already have been spent prior to applying for the RDF grant, such as making the roof and electrical system solar ready?

Generally, we prefer all project costs to be spent after the awards have been granted to ensure that the funding was necessary to make the project pencil out. However, in specific situations, there might be cost savings or efficiencies gained by having a project “solar ready” prior to either application or award announcement. We encourage individuals to reach out directly if there are questions.

Clarification on the additional 5% funding for educational engagement. Would it look like this: \$100,000 eligible project, maximum outside funding \$85,000 and an additional \$5,000 for educational aspects on top of the \$85,000?

Very close. \$15,000 would come from the applicant, \$85,000 from all outside sources (RDF, Energy Trust, other funders) and the eligible optional educational amount is based on 5% of your award request (not total eligible cost). So, in this case, 5% of the RDF funding would be the maximum educational funding allowed.

Eligibility Requirements

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.

Is there a separate form/application for the educational aspects or just part of the larger RDF application?

In the main application, there is a question specifically asking about the educational aspect of the project. This should be where you provide context and justification for any proposed educational programming. In addition, there is some space in the education budget section as the line item costs are broken down. Finally, you can include an optional education plan as an attachment if that helps to clarify the project's scope.

Can Letters of Support be both internal (owner) as well as external?

Yes, they can. An application is generally stronger when it has both organizational and community support. Gathering feedback and input from numerous parties allows a better project to be designed and shows broader support.



I note a requirement to supply data to PGE for 10 years. Does that mean the project must guarantee it will continue to be operational for that time period?

That is correct; PGE expects all projects to be fully operational for at least 10 years. Ten years is the common warranty for inverters, and it seems reasonable to expect the project to generate electricity for that lifetime.

Best Practices

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 those awarded RDF funding, is to ensure that it is delivered on schedule, on budget and in adherence with the approved scope. 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 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 the PGE 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 benefits 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 and as often as possible.



What makes an application better than others?

Please see the RDF Guidelines document for details.

Is there any advantage to submitting proposals early?

Receiving applicants early is always appreciated to help manage workflow but not necessary. The only advantage is that all projects that are submitted at least one week prior to the deadline will be reviewed by the Grants Manager for completion. To be clear, this will not be a contextual evaluation, simply making sure all necessary questions are answered and attachments are included. The Grants Manager will respond with two business days, and the applicants will be allowed to submit changes up until the deadline.

Does the PGE Green Future program participation apply to every applicant?

The PGE Renewable Development Fund is funded by PGE Green Future customers, so we want to make sure we are returning value to those who are voluntarily paying more for renewables. We also prefer to fund organizations that already have a history of supporting renewable energy, either through our own products or through other programs. However, it is not a requirement.

Will a solar project that powers an EV charging installation be more favorably viewed in scoring?

PGE is committed to further transportation electrification throughout our territory. We've had successful projects in the past that have combined renewable generation with EV charging stations to increase the impact of their award and sustainability efforts. We encourage other applicants to adopt this method and prefer to see projects with additional energy aspects (energy efficiency, storage, EV charging, other on-site generation).

Do you have any recommendations for picking solar trade allies?

PGE defers to Energy Trust of Oregon's website that allows Trade Allies to get in touch with you directly. My main recommendations would be to do this early to get as many bids as you feel comfortable. As far as quality, we're confident in the requirements Energy Trust of Oregon has laid out for contractors to become a Trade Ally and the rating system should allow the customer to see further details of their performance.



What are some of the most common “pitfalls” of applications?

An ongoing issue we find are applicants who haven't fully finalized their project budget and timeline. Those are areas of critical importance to the Selection Committee and the proper due diligence should be performed to ensure a project is completed on time and on budget. We also strongly encourage applicants to tell their story and make sure the project, as proposed, supports the ongoing mission of the organization. Our Selection Committee can only evaluate what is provided in the application so while the technical aspects should be accurate and verifiable, understanding the context also becomes important. “What is the why” is a common phrase you'll hear as we go through applications.

Are there examples of ground mount arrays receiving funds? Any insight on how a ground mount might play differently with the RDF grant?

We've had multiple ground mount systems be successful and encourage further development in this area, but it depends on the specifics of the organization. A ground mount is certainly more visible and could have greater access to solar resource, but also requires infrastructure to be built and is generally more costly. Roof mounted solar can tie into existing physical and electrical systems but can be limited in terms of resource and street visibility. A good case can be made for either and there is no preference amongst the Selection Committee.

If we apply and do not receive the grant, do you provide feedback on areas of improvement on the application? Is it possible to apply a second time?

Any applicants that do not receive funding are sent a feedback form that highlights areas of weaknesses and potential improvements. We keep this document fairly high level as not to overly influence the scope of a project, but we do want to make sure applicants have the opportunity to improve and apply again. There is no limit to how many times an organization or a project can apply.

Of the different types of renewable energy eligible for funding, what percent is set for solar and what percent is set for other technology types?

There are no set percentages the RDF has established for funding. We have historically funded a majority of rooftop solar projects, but that is strongly influenced by the organizations this fund is targeting and the available resources. In addition to solar, we have funded other project types such as in-pipe hydroelectric and biogas cogeneration engines.

How about extra points for using local materials?

Strongly encouraged! Local materials, local companies, and local labor are all things we look for in successful applications. Cost and timeline should still be balanced against locality to ensure the project represents best value for the community it will impact.



Additional questions not covered here?

Please direct your questions to RenewableDevFund@portlandgeneral.com.

