OREGON HOUSING & COMMUNITY SERVICES

MULTIFAMILY
Energy Program

OR-MEP Open Enrollment Application Guide
(2025-Round 2)

Open Enrollment Open Date: July 15, 2025
Open Enrollment Closing Date: September 2, 2025, 5:00 PM PST

This application guide details the scoring and application process for OR-MEP Open Enrollment.

OREGON HOUSING and COMMUNITY SERVICES

› TRC

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Key Updates for OR-MEP Open Enrollment 2025-R2

Compared to the last round of OR-MEP Open Enrollment (2025-R1), the following updates were made:

- "Project's location relative to available resources" renamed to "Project located in an area with limited energy efficiency resources."
- Rent limits used to determine Low-Cost Apartment equivalent area median income (AMI) tier updated to 2025 HUD rent limits.

Introduction

Purpose

Oregon Housing and Community Services ("OHCS") is seeking applications ("Applications") in this Open Enrollment: 2025-Round 2 period for the enrollment of new construction or existing multifamily rental properties into the Oregon Multifamily Energy Program ("OR-MEP").

As detailed in the Funding Allocations (2023-2027) section, OHCS anticipates releasing OR-MEP Open Enrollment rounds every 6 months. We encourage project teams to apply for this round if your project meets the following prerequisites if selected for OR-MEP funding in this Open Enrollment round:

☑ Project will finalize development of energy efficiency scope to **reserve incentives within 6 months of Open Enrollment selection**.

☑ Project will **start construction or upgrades within 18 months of Open Enrollment selection**.

**Note:** _If your project is not yet ready to commit to these timelines or are awaiting confirmation from other funding sources to confidently move forward, we ask that you wait for the next OR-MEP Open Enrollment round to apply. We want to prioritize projects that are ready to move forward immediately after being selected, and projects with an uncertain viability to move forward take away a spot from another project that could benefit from funding in this round. OHCS will enforce these deadlines for any project selected from this Open Enrollment round. Project teams that show a repeated pattern of not meeting deadlines or not making progress to move forward may be disqualified from participating in future OR-MEP Open Enrollment rounds._

Enrollment Timeline

Enrollment Stage	Date
OR-MEP Open Enrollment - 2025 Round 2 Opens	**Tuesday, July 15, 2025**
OR-MEP Open Enrollment - 2025 Round 2 Closes	**Tuesday, September 2, 2025, 5:00pm PST**
Notice of Selected Projects Issued for OR-MEP Open Enrollment – 2025 Round 2	**By Wednesday, October 1, 2025**

These dates may be subject to change at the discretion of OHCS.

OR-MEP Program Requirements

Program Summary

The Oregon Housing & Community Services' (OHCS) Multifamily Energy Program (OR-MEP) is a community-focused program that incorporates energy-efficient design in affordable multifamily rental housing. The program offers program participants resources including design assistance, cash incentives, and coordination with other regional programs.

The purpose of OR-MEP funding is to reduce energy burden[1] for low-income residents of Oregon through energy efficiency improvements and education in affordable multifamily rental housing, both Existing Buildings and New Construction. The program targets to benefit residents who are navigating low income, people of color, those who are disproportionately impacted, those customers for whom English is not their first language, those living in rural communities. Program participants may apply for OR-MEP funding to upgrade Existing Building or New Construction projects.

The OR-MEP Diversity, Equity, and Inclusion (DEI) Coalition will analyze, recommend, and influence changes to OR-MEP to make the program more accessible. The OR-MEP DEI Coalition is a team of community members from across the state to help OR-MEP incorporate diversity, equity, and inclusion in the program design, understand barriers to participation, and recommend modifications to the program and policies.

To deliver OR-MEP, OHCS works with a program implementation team, including TRC, Dragonfly Consulting, Encolor, Elevate Energy, and Unrooz Solutions. The program team implements, oversees, provides technical assistance, and coordinates the program on OHCS' behalf.

Program Requirements
For complete details on program requirements, please review the OR-MEP Program Manual.

General Eligibility
◆ Eligible applicants include nonprofit organizations, for-profit businesses, and local government entities including, but not limited to, cities, counties, housing authorities, nonprofit community organizations, regional or statewide nonprofit entities and private individuals or corporations.
◆ Existing or New Construction affordable multifamily rental properties with five (5) or more apartments per building are eligible to participate including low-rise, mid-rise, and high-rise multifamily buildings. Campus of five or more duplexes, triplex, and quadplexes are also eligible.
◆ Projects must be in Oregon and must receive electric service from Portland General Electric or Pacific Power.
◆ Project is currently (Existing Buildings only) or will be (New Construction only) heated by a hard-wired electrical heating system.
◆ To meet affordability requirements, the residents residing in at least 50% of the dwelling units must be at or below 80% AMI (area median income) and these units must remain affordable for a period of 10 years, unless superseded by other department funding resource requirements.
◆ The program can only provide incentives for measures that result in electric savings.

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[1]**Energy burden** is defined as the percent of household income spent on energy bills. Energy burden is a key component to determining if a housing unit is affordable. The most commonly used metric is that an affordable energy burden must be no higher than six percent of the household's income. (https://www.oregon.gov/energy/Get-Involved/Documents/2018-BEEWG-Ten-Year-Plan-Energy-Burden.pdf)

Open Enrollment Funding Sources, Set-Aside Categories & Allocations

Funding Sources

OR-MEP is funded through the Public Purpose Charge. Public purpose charges help fund conservation in schools, low-income weatherization and housing, and renewable energy projects in Oregon.

Senate Bill 1149 directed Oregon's two largest investor-owned electric utilities – Portland General Electric and Pacific Power – to collect a public purpose charge from their customers. Through December 31, 2021, the charge collected was equal to 3 percent of their revenues and funded energy efficiency, development of new renewable energy, and low-income weatherization projects throughout the state. ORS 757.612, the Oregon statute that outlines the requirements for public purpose charge expenditures, allocated the first 10 percent of collected funds to be distributed to school districts located within PGE's and Pacific Power's service territories. Of the remaining 90 percent, the statute designated 63 percent for energy conservation, 19 percent for renewable energy projects, 13 percent for low-income weatherization, **and 5 percent for low-income housing. This 5% is what funds the Oregon Multifamily Energy Program.**

In 2021, the Oregon Legislature passed House Bill 3141, which made numerous changes to the statues for the Public Purpose Charge. These changes include extending the Public Purpose Charge collection and programs associated through January 01, 2036, moving energy conservation funding out of the Public Purpose Charge to energy efficiency through utility rates, reducing the collection of 3% to 1.5% and lastly adjusted the funding percentages allocated to the remaining categories:

· 0.30% of 1.5% to School Districts
· 0.51% of 1.5% to Renewable Energy
· 0.55% of 1.5% to Low-Income Weatherization
· **0.14% of 1.5% to Low-Income Housing**

This 0.14% of 1.5% is what currently funds OR-MEP and is administered by Oregon Housing and Community Services.

Funding Allocations (2023-2027)

OHCS anticipates $14 million in funding for OR-MEP over the next 5 years through 2027. This Open Enrollment framework estimates the following funding distribution for the anticipated $14 million distributed over 5 years.

OHCS anticipates releasing OR-MEP Open Enrollments in rounds approximately every six (6) months. This frequency allows OR-MEP to better serve projects that are initiated throughout the year and ensure an equitable distribution of funded projects through a bi-annual enrollment frequency.

Table 1: OR-MEP Funding Calendar 2023-2027 (Assuming $14 million over 5 years)

Open Enrollment Round	Date of Open Enrollment Release	Date of Open Enrollment Close	Funding Availability	Estimated Units to Serve
2023-R1 [COMPLETE]	July 12, 2023	August 28, 2023	$2,500,000	825 units
2024-R1 [COMPLETE]	Jan 15, 2024	Mar 1, 2024	$2,500,000	825 units
2024-R2 [COMPLETE]	Jul 15, 2024	Aug 30, 2024	$1,750,000	575 units
2025-R1 [COMPLETE]	Jan 15, 2025	Mar 3, 2025	$1,750,000	575 units
2025-R2	Jul 15, 2025	Sept 2, 2025	$1,300,000	425 units
2026-R1	Jan 15, 2026	Mar 1, 2026	$1,300,000	425 units
2026-R2	Jul 15, 2026	Aug 31, 2026	$1,300,000	425 units
2027-R1	Jan 15, 2027	Mar 1, 2027	$800,000	275 units
2027-R2	Jul 15, 2027	Aug 31, 2027	$800,000	275 units
			TOTAL $14,000,000	**4,625 units**

Set-Aside Categories – OR-MEP Open Enrollment – 2025 Round 2

For this OR-MEP Open Enrollment 2025-R2, OR-MEP has set aside the following funding amounts and reserves the right to add resources to fully fund Projects:

Table 2: 2025-Round 2 OR-MEP Open Enrollment Set Aside Categories

Project Type / Utility	Pacific Power Service Area	Portland General Electric Service Area	Total
New Construction	$325,000	$325,000	**$650,000**
Existing Multifamily	$325,000	$325,000	**$650,000**
TOTAL	**$650,000**	**$650,000**	**$1,300,000**

Definitions

For the purposes of this Open Enrollment, the following terms have the following meanings:

- **BIPOC**: Black, Indigenous, People of Color. BIPOC communities, or communities of color, are identity-based communities that hold a primary racial identity that describes the racial characteristics of the community that its members share (such as being African American) that supports self-definition by community members, and that typically denotes a shared history and current/historic experiences of racism. The community may or may not also be a geographic community. Given that race is a socially defined construct, the definitions of these communities are dynamic and evolve across time.

- **Culturally Specific Organization (CSO)**: A nonprofit organization designed to serve historically underserved communities least likely to apply for housing occupancy and that is:
  - representative of a community or significant segments of a community.
  - provides affordable housing to very low- and low-income households; and
  - can demonstrate primary target populations served to be 'least likely to apply', meaning there is an identifiable presence of a specific demographic group in the housing market area, but members of that group are not likely to apply for the housing without targeted outreach, including marketing materials in other languages for limited English proficient individuals, and alternative formats for persons with disabilities. Reasons for not applying may include, but are not limited to, insufficient information about housing opportunities, language barriers, or transportation impediments.

- **Culturally Responsive Organization (CRO)**: An entity that comprehensively addresses power relationships throughout the organization, from the types of services it provides and how it maximizes language accessibility to its human resources practices-who it hires, how they are skilled, prepared and held accountable, to its cultural norms, its governance structures and policies, and its track record in addressing conflicts and dynamics of inclusion and exclusion, to its relationships with racial groups in the region, including its responsiveness to expectations. A Culturally Responsive Organization is one that is dynamic, on a committed path to improvement and one that is hardwired to be responsive to the interests of Communities of Color, service users of color and staff of color. Culturally responsive organizations hire and train culturally and linguistically diverse staff to meet the needs of the diverse communities they serve.

- **Rural & Non-Rural**: The data source for rural/urban designation is based on OHSU Office of Rural Health's Rural and Frontier Data[2].

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[2] https://www.ohsu.edu/oregon-office-of-rural-health/about-rural-and-frontier-data

Enrollment Process

Application Submission Process

The OR-MEP Open Enrollment application process requires submission of a form that is submitted electronically. Open Enrollment Application can be found on the OR-MEP website at the following location: https://oregonmultifamilyenergy.com/apply

Completed Open Enrollment Applications should be submitted via email to:
OHCSMultifamilyEnergy@trccompanies.com

Applications must be submitted no later than Tuesday, September 2, 2025, at 5:00 PM PST. Any application submitted after this time will not be evaluated.

Application Review Process

1. **Application Ranking Process**: Applications in response to this Open Enrollment are reviewed and competitively ranked in accordance with the following:
   a. Complete application submission
   b. Receive an overall score (for Scored Criteria),
   c. Ranked highest to lowest by score in the appropriate set-aide.
   OHCS, at its sole discretion, may choose not to award all available resources.

   Applications are first ranked within each Set-Aside Category. Applications that have the highest scores within each set-aside category will be recommended for funding as allocated resources allow. If Applications within a set aside do not score well enough to be funded (meet a minimum of at least 10 points) or if there are no Projects to fund within a set-aside category, the set-aside category funds will be put back into the OR-MEP incentive pool in accordance with their set-aside definitions.

2. **Tie Breaking Rule**: If the total evaluation scores of two (2) or more Applications result in a tie and OR-MEP allocation availability is insufficient to fund all tied Applications, the following factors, in order of priority, will break the tie:
   a. Project with an earlier construction start date will be selected.
   b. Project with higher total points in BIPOC and High Priority Area Index (Energy Burden) categories will be funded.
   c. Project with higher unit count if funding this round allows.

Oregon Housing & Community Services Multifamily Energy Program

Scoring Categories & Weighting

Category	Max Total Points	% of Points
BIPOC (Community + Residents)	10	27%
High Priority Area Index (Energy Burden)	5	14%
Project located in an area with limited energy efficiency resources (Rural)	10	27%
Low-Cost Apartments	5	14%
Serving households with very low incomes	5	14%
Non-profit/housing authority	2	5%
Total	**37**	**100%**

Prioritization Criteria

The following criteria will be scored and will contribute to the Application Ranking Process as noted above.

Scored Criteria	# of Points	% of Total Points
1. Project is in a BIPOC community. Score will be noted in the Open Enrollment application based on the project address provided. The data source is based on data found in <u>Affordable Housing Assessment Map, "Ethnicity and Race – Census Tract – Percent of BIPOC"</u> layer. *Note: Percent thresholds and points are measured differently for rural and non-rural projects to account for varying conditions across the state.* [3] *OR-MEP Intent: The intent of this criteria is to prioritize projects located in BIPOC communities.*		
Rural[4] Projects		
% BIPOC in Census Tract: <5%	0	0%
% BIPOC in Census Tract: 5-12%	1	3%
% BIPOC in Census Tract: 13-19%	3	8%
% BIPOC in Census Tract: 20%+	5	14%
Non-Rural[5] Projects		
% BIPOC in Census Tract: <15%	0	0%
% BIPOC in Census Tract: 15-29%	1	3%
% BIPOC in Census Tract:30-44%	3	8%

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[3] Project location must be in Portland General Electric or Pacific Power electric service area to meet OR-MEP eligibility requirement of "project must receive electric service from Portland General Electric or Pacific Power". This requirement supersedes rural and non-rural definitions.

[4] <u>Rural & Non-Rural</u>: The data source for rural/urban designation is based on <u>OHSU Office of Rural Health's Rural and Frontier Data</u>.

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Scored Criteria	# of Points	% of Total Points
% BIPOC in Census Tract: 45%+	**5**	**14%**

2. Project is primarily serving BIPOC communities.

There are two options listed below to qualify for this category.

- Option A that involves a BIPOC Culturally Specific Organization as a property owner/developer, property manager, or project partner is available to all projects statewide. [1-5 pts]
- Option B that involves a BIPOC Culturally Responsive Organization as a property owner/developer is an alternate option available to projects located in rural communities only. [3 pts]

OR-MEP Intent: The intent of this criteria is to prioritize projects that are explicitly designed and located to address displacement of BIPOC residents and communities, and to ensure underserved BIPOC communities are represented as residents of property.

Option A: BIPOC Culturally Specific Organization option (available for all projects statewide) [0-5 pts] Projects that are owned/developed, managed, or partnering with a BIPOC Culturally Specific Organization are an indicator of a BIPOC community being reflected as residents of an affordable multifamily rental property.		
The project is not partnering with BIPOC Culturally Specific Organization.	**0**	**0%**
Supporting Questions: none		
The project is advertising and marketing the property in partnership with a BIPOC Culturally Specific Organization.	**1**	**3%**
Supporting Questions: 1. *What is the name of the BIPOC Culturally Specific Organization?* 2. *Explain how the organization is effective in working with the BIPOC community in the project's region. [Narrative, max 300 words]*		
The project is partnering with a BIPOC Culturally Specific Organization that: **(a) is contributing to the design to improve the property to better meet the unique needs and preferences of the community.** **OR** **(b) will provide culturally sensitive support for current or future residents on a permanent basis.**	**3**	**8%**
Supporting Questions: 1. *What is the name of the BIPOC Culturally Specific Organization?* 2. *Explain how the organization is effective in working with the BIPOC community in the project's region. [Narrative, max 300 words]* 3. *How is the BIPOC Culturally Specific Organization contributing to the design or operation of the project? [Checklist as follows]*		

Scored Criteria	# of Points	% of Total Points
The BIPOC Culturally Specific Organization is currently or will be providing: ☐ *Predevelopment outreach work, such as a survey and/or focus groups with current or potential future residents from the BIPOC community they serve.* ☐ *Resident placement services that connect BIPOC community members they serve to the property.* ☐ *Language and application support for prospective residents.* ☐ *Ongoing youth programs, such as childcare, tutoring, mentorship programs etc. at the property.* ☐ *Ongoing supportive services, such as language access services, physical and mental health services, home ownership support, financial literacy, education, cultural celebration etc.* ☐ *Cultural sensitivity training for the property staff.* ☐ *Other [text box for optional additional info]*		
A BIPOC Culturally Specific Organization: **(a) is the sole or part owner of the property.** **OR** **(b) is currently (existing buildings) or will (new construction) manage the property.**	**5**	**14%**
Supporting Questions: 1. *What is the name of the BIPOC Culturally Specific Organization?* 2. *Explain how the organization is effective in working with the BIPOC community in the project's region. [Narrative, max 400 words]*		
Option B: BIPOC Culturally Responsive Organization option (available for projects located in rural communities) [3 pts] Projects that are owned or developed by BIPOC Culturally Responsive Organization (CRO) are an indicator of a BIPOC community being reflected as residents of an affordable multifamily rental property.		
A BIPOC Culturally Responsive Organization (CRO) owns or is developing the property.	**3**	**8%**
Supporting Questions: 1. *CRO Identifying Activities - Organizations that meet the definition of a BIPOC Culturally Responsive Organization conduct many of the following activities. Please select the activities the organization is applying for OR-MEP funds and identifying as a BIPOC CRO is currently doing.* ☐ *Recruits, retains, and promotes staff that reflect the cultural diversity of the community they want to serve.*		

Scored Criteria	# of Points	% of Total Points

□ *Provides staff with training around DEI and culturally and linguistically appropriate service delivery.*

□ *Has leadership and/or board members that reflect the BIPOC communities they want to serve.*

□ *Has a plan/strategy for serving BIPOC communities (e.g., Affirmative Fair Housing Plan or another plan).*

□ *Participates in partnerships with community groups and/or other agencies that target diverse cultural groups.*

□ *Offers written materials and intake forms in languages that target the groups they want to serve in their service area.*

□ *Has staff or provides professional interpreter services, at no cost, to all potential residents with limited English.*

□ *Collects reliable demographic information to evaluate its impact with the BIPOC Community.*

□ *Other [text box for optional additional info]*

2. *Organization Composition: At an organizational level, why is your organization well equipped to serve the needs of the BIPOC community? [Narrative, max 400 words]*

3. *Community Relationships & Trust: What existing community relationships and established trust with diverse cultural groups does your organization have to lead to BIPOC residents being reflected in the property applying for OR-MEP funds? [Narrative, max 400 words]*

4. *Community Outreach: What is your organization's community outreach plan for serving BIPOC communities? What will it look like if you are successful? [Narrative, max 400 words]*

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3. **Project's High Priority Area Index Score (Energy Burden).**
Score will be noted in the Open Enrollment application based on the project address provided. The data source is based on data found in Affordable Housing Assessment Map, "High Priority Area Index – Census Tract – Index" layer

OR-MEP Intent: The intent of this criteria is to prioritize projects with high priority area index score, which is a metric defined in the Ten Year Plan: Reducing the Energy Burden in Oregon Affordable Housing (p 17). This index was created to identify locations more easily in Oregon with the greatest energy burden. The index includes a measure of energy burden along with other factors that are known to drive energy burden, including: affordability hardship due to low household income

Scored Criteria	# of Points	% of Total Points
(economic driver); poor home energy efficiency due to older home vintage (physical driver); and housing inequity issues due to ethnicity/race (systemic driver). For more information about how this index was created, refer to: https://www.oregon.gov/energy/Get-Involved/Documents/2018-BEEWG-AHA-Guide-Methodology.pdf		
High Priority Index Score: <1	0	0%
High Priority Index Score: 1.00 – 1.99	1	3%
High Priority Index Score: 2.00 – 2.99	3	8%
High Priority Index Score: 3.00+	5	14%

4. Project located in an area with limited energy efficiency resources.

Score will be noted in the Open Enrollment application based on the project address provided. [5]

OR-MEP Intent: The intent of this criteria is to prioritize projects in locations that are currently underserved by OR-MEP, and due to their location away from urban centers the projects are typically resource constrained due to high labor costs of energy upgrades tied to workforce shortages compared to projects located in populated urban areas.

	# of Points	% of Total Points
Portland	1	3%
Urban[5] in Multnomah County (except Portland), Washington County, Clackamas County	3	8%
Urban[5] outside Multnomah, Washington, Clackamas Counties	5	14%
Rural[5]	10	27%

5. Project is Low-Cost Apartments (LCA).

Is this property currently unsubsidized rental housing with no current or planned affordable regulatory agreement with a federal, state, or local agency? Low-Cost Apartments (LCA) are currently unsubsidized rental housing that maintains low rents without state or federal subsidies*.* The rents are affordable to residents with lower incomes, and who typically can pay no more than 30% of their income on rent and utilities. Low-Cost Apartment property owners have typically never participated in affordable housing programs (e.g., OHCS NOFAs, Housing Bureau NOFAs, LIHTC, HUD or USDA). To be eligible for OR-MEP incentives, applicants must agree to enter into a 10-year affordability agreement with OHCS, where the residents residing in at least 50% of the dwelling units are at or below 80% area median income. Learn more here: https://oregonmultifamilyenergy.com/faqs/

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[5] Project location must be in Portland General Electric or Pacific Power electric service area to meet OR-MEP eligibility requirement of "project must receive electric service from Portland General Electric or Pacific Power". This requirement supersedes rural and urban definitions.

Scored Criteria	# of Points	% of Total Points
(Note: Projects that have an expired affordability agreement at the time of Open Enrollment application and are reapplying for new funds that will have an affordability agreement are not considered LCA. (e.g., an expired LIHTC project that is applying for new OHCS funds as part of larger capital upgrades is not considered LCA.)		
OR-MEP Intent: The intent of this criteria is to prioritize Low-Cost Apartments that are not currently subsidized and by enrolling in OR-MEP Low-Cost Apartments agree to meet OR-MEP affordability requirements by entering into a 10-year affordability agreement with OHCS, which will help preserve affordable and low-cost housing in Oregon. Low-Cost Apartments typically have small teams that own and operate the property and need more support than a traditional affordable housing owner and developer to navigate and participate in an affordable housing program.		
No	**0**	**0%**
Yes	**5**	**14%**
6. **Project is serving households with very low incomes.** The project is serving households experiencing very low income. Select the minimum affordability thresholds the project is serving. *Note: This criteria is measured differently for non-Low-Cost Apartment projects and Low-Cost Apartment projects and should align with selection made in above Criteria 5 – Project is Low-Cost Apartments (LCA).* *OR-MEP Intent: The OR-MEP affordability requirement is that at least 50% of units serve residents that are at or below 80% area median income (AMI) and units must remain affordable for at least 10 years. The intent of this criteria is to prioritize projects that will go beyond the affordability requirements of the program and will have more affordable units serving households experiencing very low income.*		
Non-LCA Project (federal or state subsidized): *% of Affordable Units & Income Levels*		
50% of units at or below 80% AMI	**0**	**0%**
100%[6] of units at or below 80% AMI	**1**	**3%**
100%[6] of units at or below 60% AMI	**2**	**5%**
100%[6] of units mix of 60% AMI and 30% AMI	**3**	**8%**
100%[6] of units at or below 30% AMI	**5**	**14%**
LCA Project (unsubsidized): *Average Monthly Rent*		
All average monthly rents by unit size at or below 80% HUD Limit[7]	**1**	**3%**
All average monthly rents by unit size at or below 60% HUD Limit[7]	**3**	**8%**

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[6] Excludes units reserved for management or support staff.
[7] Refer to HUD Income & Rent Limits by Year, County, and specifically the section called *2025 Income & Rent Limits | LIHTC, Tax Exempt Bonds* found here: https://www.oregon.gov/ohcs/compliance-monitoring/pages/rent-income-limits.aspx

Scored Criteria	# of Points	% of Total Points
All average monthly rents by unit size at or below 30% HUD Limit[7]	**5**	**14%**
7. Applicant entity is a nonprofit or housing authority. To be eligible as a nonprofit, the applicant entity must be a recognized 501(c)(3) organization. To be eligible as a housing authority, the applicant entity must be a housing authority associated with a government entity. *OR-MEP Intent: The intent of this criteria is to prioritize nonprofits and housing authorities that are often more resources constrained than for-profit applicant entities.*		
No	**0**	**0%**
Yes	**2**	**5%**
Total Maximum Points	**37**	**100%**

The following criteria will not be scored and include both prerequisite questions and informational questions for the program team to better understand your project.

Not Scored Criteria
1. PREREQUISITE: If selected for OR-MEP funding in this Open Enrollment round, project will finalize development of energy efficiency scope to reserve incentives within 6 months of Open Enrollment selection. **How soon will project be able to finalize submittal for OR-MEP incentive reservation if you are selected for OR-MEP Open Enrollment?** *OR-MEP Intent: The intent of this question is to confirm project will meet prerequisite requirements and finalize incentive reservation within 6 months of Open Enrollment selection.*
Within 1 month
1 – 2 months
2 – 3 months
3 – 4 months
4 – 5 months
5 – 6 months
More than 6 months
2. PREREQUISITE: If selected for OR-MEP funding in this Open Enrollment round, the project will start installing energy upgrades within 1 year of Open Enrollment selection. **Install/Construction Timeline: What is anticipated energy upgrade installation/construction start date of project? What is the anticipated energy upgrade installation/construction completion date of projects?**

OR-MEP Intent: The intent of this question is to confirm project will meet prerequisite requirements and start installing energy upgrades within 1 year of Open Enrollment selection.

<Enter installation/construction start date>
<Enter installation/construction completion date>

3. **INFORMATIONAL: If selected for Open Enrollment, will the project be able to proceed with the next steps of OR-MEP, including reserving incentives and installing energy upgrades?**

Please confirm the following:
- Are all funding sources confirmed (e.g., NOFAs have been awarded)? If so, please provide details of the confirmed funding, including the name of the funding source, date confirmed, and funding amounts confirmed. If not, what is pending and when is anticipated date of funding confirmation?
- Are there any other pending decisions that could prevent the project from moving forward if selected for Open Enrollment?

OR-MEP Intent: The intent of this question is to confirm that project can move forward and finalize OR-MEP incentives if selected for OR-MEP Open Enrollment.

Yes (please provide details)
No (please provide details)

4. **INFORMATIONAL: Do you have an Energy Consultant, and third party Verifier lined up for this project?**

OR-MEP Intent: The intent of this question is to understand who you may be working with as an Energy Consultant and third party verifier. If you do not have these roles defined yet, OR-MEP can help you find Energy Consultants who are familiar with the program and can serve in this role.

Yes, if so state who.
No, I need help to find one
No, not yet, but I have someone in mind
No, I do not plan to work with an Energy Consultant or Verifier.

5. **INFORMATIONAL: What potential energy efficiency upgrades are you considering? Please select from the checklist.**
OR-MEP Intent: The intent of this question is to help the OR-MEP team provide better support in navigating the program pathways for incentives, should your project be selected, based on the potential energy efficiency upgrades you are considering for this project.

☐ **high efficiency heating and cooling system (e.g., ductless heat pump)**
☐ **high efficiency ventilation (e.g., ENERGY STAR bathroom exhaust, ERV/HRV**
☐ **high efficiency water heating system (e.g., heat pump water heater)**
☐ **high efficiency envelope upgrades (e.g., insulation, windows)**
☐ **high efficiency lights and appliances**
☐ **Other? (please provide details)**

6. **<u>INFORMATIONAL</u>: Will the project be pursuing other energy efficiency program funding sources? Please describe. (e.g., Oregon Department of Energy, Energy Trust of Oregon, Portland Clean Energy Fund)**

- **After Open Enrollment selections are made would you like us to share your project information with these other energy programs to explore other funding opportunities?**

<u>OR-MEP Intent</u>: The intent of this question is to support your project to maximize incentives by layering with other eligible programs and allow OR-MEP program staff to coordinate with these programs.

Yes
No

7. **<u>INFORMATIONAL</u>: Is the applicant organization submitting multiple applications for different projects in this round of Open Enrollment? If so, does the organization have the capacity to move forward with all selected projects?**

<u>OR-MEP Intent</u>: The intent of this question is to confirm a project team's capacity to move forward with selected projects.

<PLEASE ENTER NARRATIVE RESPONSE>