

**STATE OF OREGON DEPARTMENT OF ENERGY  
PERFORMANCE AGREEMENT  
(Community Renewable Energy Grant Program)**

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This Agreement is between the State of Oregon, acting by and through its Department of Energy, hereinafter referred to as “Agency,” and XXXXX, hereinafter referred to as “Grantee.”

Administrators of this Agreement are:

GRANTEE	AGENCY
<b>Administrator:</b> <b>Title:</b> <b>Address:</b>  <b>Phone:</b> <b>Fax:</b> <b>Email:</b> <b>Federal ID #:</b>	<b>Administrator:</b> <b>Title:</b> Energy Services Manager <b>Address:</b> 550 Capitol Street NE Salem, OR 97301 <b>Phone:</b> (503) 378-4040 <b>Fax:</b> <b>Email:</b> <a href="mailto:community.grants@energy.oregon.gov">community.grants@energy.oregon.gov</a>

**AGREEMENT**

1. **Authority.** This Agreement is authorized by Oregon Laws 2021, chapter 508, sections 29 through 32 (House Bill 2021 and Oregon Administrative Rule Chapter 330 Division 250.

2. **Definitions.**

“**Community renewable energy project**” means one or more renewable energy systems, storage systems, microgrids or energy-related infrastructure that promote energy resilience, increase renewable energy generation or renewable energy storage capacity and provide a direct benefit to a particular community in the form of increased community energy resilience, local jobs, economic development or direct energy costs savings to families and small businesses.

“**Partner**” means an entity listed as a partner to an eligible applicant on an application for a grant award. A partner may be a federally recognized Oregon Indian tribe, public body, nonprofit entity, private business with a business site in Oregon, or owner of a rental property in Oregon.

“**Planning costs**” means the costs related to planning paid by an applicant described under Oregon Laws 2021, chapter 508, section 30.

“**Project cost**” means the actual cost of the acquisition, construction and installation of a renewable energy system incurred by an applicant, before considering utility incentives.

“**Renewable energy system**” includes:

(a) A system that uses biomass, solar, geothermal, hydroelectric, wind, landfill gas, biogas or wave, tidal or ocean thermal energy technology to produce energy.

(b) One or more energy storage systems paired with an existing or newly constructed system described in paragraph (a) of this section.

(c) One or more vehicle charging stations paired with an existing or newly constructed system described in paragraph (a) of this section.

(d) Microgrid enabling technologies paired with an existing or newly constructed system described in paragraph (a) of this section, including microgrid controllers and any other related technologies needed to electrically isolate a community energy resilience project from the electric grid so that the project is capable of operating independently from the electric grid.

3. **Effective Date and Duration.** This Agreement shall become effective on the date this Agreement is fully executed and approved as required by applicable law (the “Effective Date”). Grantee shall have 30 calendar days from the date on which this performance agreement is provided to Grantee to accept the performance agreement. Grantee’s failure to accept this performance agreement by the deadline may cause rejection of the grant application and the performance agreement may be terminated. Unless earlier terminated, amended or extended, this Agreement shall expire **12 months from the execution date**.
4. **Agreement Documents.** This Agreement consists of the following documents, which are listed in descending order of precedence: this Agreement less all Exhibits, Exhibit A (Project Description), Exhibit B (Agency’s Opportunity Announcement #22-001), Exhibit C (Reporting Forms), Exhibit D (Financial Reporting Guidance) and Exhibit E (Grantee’s Application). Exhibits A, C and D are attached hereto, Exhibit C is also available online through the online reporting portal, Exhibit B is available to view online on Agency’s website, and Exhibit E is available from the online application portal for the Community Renewable Energy Grant program. All Exhibits are incorporated herein by this reference.
5. **Grant.** In accordance with the terms and conditions of this Agreement, Agency shall provide Grantee an amount not to exceed **\$XXX** (“Grant” or “Grant Monies”) for the purpose of planning the Community Renewable Energy Project described in Exhibit A (the “Project”). Agency shall pay Grantee from monies dedicated from the Community Renewable Investment Fund. Disbursement of Grant Monies is contingent, as of the time of disbursement, on Agency having received sufficient expenditure authorizations to allow Agency, in the exercise of its reasonable administrative discretion, to make the disbursement.
6. **Reporting.**
  - a. **Quarterly Reporting.** Grantee must submit Quarterly Reports beginning the first calendar quarter following the Effective Date of this Agreement and each calendar quarter thereafter until the Project planning is complete. Reports are due by the 15<sup>th</sup> day of the month immediately following the end of each quarter (January 15<sup>th</sup>, April 15<sup>th</sup>, July 15<sup>th</sup>, October 15<sup>th</sup>). Quarterly Reports shall be submitted using the Quarterly Report Form in the online reporting portal, as it may be modified from time to time by Agency.
  - b. **Final Report.** Grantee must submit a Final Report promptly after completion of the project planning, and before receiving final payment of funds from Agency. The Final Report must be submitted using the Final Report Form provided in online reporting portal, as it may be modified from time to time by Agency, and must be accompanied by the information described below.
    1. A copy of the plan completed under this performance agreement which must include a proposal for developing a community renewable energy project that provides at a minimum the following details:
      - A description of how consultation with the following groups was incorporated into the planning:

- Members of qualifying communities served by the proposed community renewable energy project;
  - Businesses located in the communities served by the proposed community renewable energy project;
  - Electric utilities that have customers in the communities served by the proposed community renewable energy project; and
  - Other regional stakeholders.
  - A description of the project that includes the following information:
    - An assessment of the suitability of the site.
    - A detailed description of the project including type and quantity of equipment, how the system will integrate into existing site or building conditions and any additional work needed.
    - If the project is for generating renewable energy:
      - Technical specifications of the selected technology.
      - Nameplate capacity (KW) of the entire project.
      - Projected amount of net energy the project will generate, in KWh per year for electricity generation or Btu for other types of energy.
      - A renewable resource assessment demonstrating adequate renewable resource availability for the proposed system operations that includes the data collected to support the assessment and any assumptions made.
    - If the project is for energy storage:
      - Technical specifications of the selected technology.
      - Nameplate power storage capacity in KW.
      - Projected amount of net energy the project will supply, in KWh per year.
      - Duration the project will provide backup for selected purposes.
      - Proposed operational use cases for the energy storage project.
  - A project management plan that includes:
    - A detailed construction plan and project schedule.
    - A description of who would manage the planning, construction, and system start-up.
  - If applicable, a description of the community resilience aspects of the project.
  - A project budget that includes:
    - The anticipated total project cost with an itemized list of costs.
2. An account of total Planning Costs that identifies all funding sources and includes receipts, paid invoices, cancelled checks (if applicable), and bank loan or promissory note documentation. It should also include an itemized list of equipment and incurred Planning Costs. Reasonable Planning Costs itemized may include, but is not limited to, costs associated with:
1. Consulting fees, including design and engineering;
  2. Load analysis;
  3. Siting, excluding property acquisition;
  4. Ensuring code compliance;
  5. Interconnection studies;
  6. Transmission studies; and
  7. Other expenditures, summarized by purpose

If the total Planning Costs are \$50,000 or more, Grantee must also include an independent Certified Public Accountant’s attestation to the validity and accuracy of the account.

3. If a description of how disadvantaged business enterprises, emerging small businesses, or businesses that are owned by minorities, women, or disabled veterans would be involved in the planning of the Project was provided in the application, Grantee must provide proof of their involvement, including the amount of involvement they had, or a statement of why they were not involved.
4. If they pay property taxes, proof that Grantee or owner of the proposed Project’s location, if other than Grantee, is current on the property taxes for the Project’s location.

**7. Disbursement and Recovery of Grant.**

**a. Disbursement.**

If requested by the Grantee, the Agency shall disburse up to 30 percent of the Grant Monies to Grantee upon execution of this performance agreement.

Agency shall disburse, the remaining Grant Monies, up to 100 percent of the Grant Monies, to Grantee following completion of the planning of the Community Renewable Energy Project and receipt and approval of a Final Report meeting the requirements of Section 6(b) and Exhibit C, subject to the following conditions:

1. Agency shall not disburse an amount that exceeds the actual Planning Costs.
2. Agency shall not disburse an amount that exceeds 100 percent of the Planning Costs, when combined with other incentives or grants available to Grantee.
3. Grantee has complied with all the terms and conditions of this Agreement.

Agency may audit all documentation relating to the Project prior to disbursement. Planning is considered complete upon the completion of the project plan document. Agency will communicate audit findings within 60 days and Grantee will have 60 days to respond to audit findings.

- b. Allowable Costs.** The Grant is for planning the Project. Grant funds may be used only for eligible costs described in OAR 330-250-0050 and shall not be used to cover any fixed costs the Grantee would incur in the normal course of business or for any other purpose not described in OAR 330-250-0050. No Grant Monies will be disbursed for any changes to the Project planning unless such changes are approved by Agency by Amendment pursuant to Section 13.b hereof.
- c. Recovery of Grant Monies.** Grantee shall repay Agency all Grant Monies if Grantee has not cured any default under Section 11 hereof within 30 days of notice of default by Agency, or such other longer period as may be set by Agency in its notice of default. Agency’s notice that Grantee is in default shall specify a deadline for the repayment of the Grant Monies.

**8. Representations and Warranties of Grantee.** Grantee represents and warrants to Agency as follows:

**a. Organization and Authority.** Grantee is a:

- Federally recognized Oregon Indian tribe
- Public body
- Consumer-owned Utility

Grantee has full power, authority and legal right to make this Agreement and to incur and perform its obligations hereunder, and the making and performance by Grantee of this Agreement: (1) have been

duly authorized by all necessary action of Grantee, (2) do not and will not violate any provision of any applicable law, rule, regulation, or order of any court, regulatory commission, board, or other administrative agency or any provision of Grantee's organizational documents, and (3) do not and will not result in the breach of, or constitute a default or require any consent under, any other agreement or instrument to which Grantee is a party or by which Grantee or any of its properties may be bound or affected. No authorization, consent, license, approval of, filing or registration with or notification to any governmental body or regulatory or supervisory authority is required for the execution, delivery or performance by Grantee of this Agreement.

- b. **Binding Obligation.** This Agreement has been duly executed and delivered by Grantee and constitutes a legal, valid and binding obligation of Grantee, enforceable in accordance with its terms subject to the laws of bankruptcy, insolvency, or other similar laws affecting the enforcement of creditors' rights generally.
- c. **Location of System.** The Project will be permanently located in Oregon.
- d. **Authorizations.** Grantee will obtain all applicable licenses, permits, or other authorizations that are required for planning the Project and will comply with applicable federal, state, and local laws and regulations.
- e. **Full Disclosure.** Grantee has disclosed in writing to Agency all material facts related to planning the Project or the ability of Grantee to plan the Project. Grantee has made no false statements of fact to Agency, nor has it omitted information necessary to prevent any statements from being misleading. The information contained in this Agreement and Grantee's application for the Grant is true and accurate in all respects.
- f. **Release of relevant information.** The Grantee authorizes any incentivizing entity outside of the department to release all relevant information on this project and associated planning to the department. This includes, but is not limited to, project information, incentives offered and received, and inspection results.

The warranties set forth above are in addition to, and not in lieu of, any other warranties set forth in this Agreement or implied by law.

#### 9. Certain Covenants of Grantee.

- a. **Grant Monies.** Grantee shall vigilantly safeguard the Grant Monies received hereunder and maintain financial controls sufficient to protect such monies and ensure that the Grant Monies are used solely for the planning of the Project.
- b. **Completion.** The planning of the Project shall be completed within 6 months of the Effective Date of this Agreement. Planning of the Project is complete upon the completion of the project plan document.

#### 10. Records Maintenance and Access.

- a. **Access to Records.** Grantee acknowledges and agrees that Agency and the Oregon Secretary of State's Office and the federal government and their duly authorized representatives shall have access to such financial records and other books, documents, papers, plans, records of shipments and payments and

writings of Grantee that are pertinent to this Agreement, whether in paper, electronic or other form, to perform examinations and audits and make excerpts, transcripts, and copies.

- b. Retention of Records.** Grantee shall retain and keep accessible all books, documents, papers, plans, records, and writings, that are directly related to this Agreement, the Grant Monies or the Project for a minimum of 6 years, or such longer period as may be required by applicable law, following the later of (1) termination or expiration of this Agreement or (2) the date of the conclusion of any audit, controversy or litigation arising out of or related to this Agreement.

**11. Default.** Grantee shall be in default under this Agreement upon the occurrence of any of the following events:

- a.** Grantee fails to perform, observe, or discharge any of its covenants, agreements, or obligations set forth herein;
- b.** Any representation, warranty or statement made by Grantee herein or in any documents or reports relied upon by Agency to monitor planning of the Project, the expenditure of Grant Monies or the performance by Grantee is untrue in any material respect when made;
- c.** The Director of the Oregon Department of Energy determines that Grantee has violated the provisions of Oregon Laws 2021, chapter 508, sections 29 through 32 (House Bill 2021), and applicable rules;
- d.** Grantee (i) applies for or consents to the appointment of, or taking of possession by, a receiver, custodian, trustee, or liquidator of itself or all or any substantial portion of its property, (ii) admits in writing its inability, or is generally unable, to pay its debts as they become due, (iii) makes a general assignment for the benefit of its creditors, (iv) commences a voluntary case under the U.S. Bankruptcy Code (as now or hereafter in effect), (v) files a petition seeking to take advantage of any other law relating to bankruptcy, insolvency, reorganization, winding-up, or composition or adjustment of debts, (vi) fails to controvert in a timely and appropriate manner, or acquiesces in writing to, any petition filed against it in an involuntary case under the U.S. Bankruptcy Code (as now or hereafter in effect), or (vii) takes any action for the purpose of effecting any of the foregoing; or
- e.** A proceeding or case is commenced, without the application or consent of Grantee, in any court of competent jurisdiction, seeking (i) the liquidation, dissolution or winding-up, or the composition or readjustment of debts, of Grantee, (ii) the appointment of a trustee, receiver, custodian, liquidator, or the like of Grantee or of all or any substantial part of its assets, or (iii) similar relief in respect to Grantee under any law relating to bankruptcy, insolvency, reorganization, winding-up, or composition or adjustment of debts, and such proceeding or case continues undismissed, or an order, judgment, or decree approving or ordering any of the foregoing is entered and continues unstayed and in effect for a period of sixty consecutive days, or an order for relief against Grantee is entered in an involuntary case under the U.S. Bankruptcy Code (as now or hereafter in effect).
- f. Remedies upon Default.** Upon the occurrence of Grantee's default under Section 11. b., d. or e, or if Grantee's default under Section 11.a. or c. is not cured within 30 calendar days of written notice thereof to Grantee from Agency or such longer period as Agency may authorize in its sole discretion, Agency may pursue any remedies available under this Agreement, at law or in equity. Such remedies include, but are not limited to, termination of Agency's obligation to make the Grant under this Agreement, return of the Grant Monies, payment of interest earned on the Grant Monies, and declaration of ineligibility for the receipt of future grant awards from Agency. If, as a result of Grantee's default, Agency demands return of the Grant Monies or payment of interest earned on the Grant Monies, Grantee shall pay the amount upon Agency's demand in accordance with Section 7.



- g. Failure to meet timeline.** If a grantee fails, or expects to fail, to complete planning of the Project within the six months of the execution date of this agreement, or fails to submit all final reporting requirements within the time frame specified in this agreement, the grantee must notify the department in writing in a timely manner and no later than one month after the six month deadline and prior to the expiration date of this agreement. The notification must describe the cause of the delay, measures taken by the grantee to resolve the delay, and a revised timeline for completing the planning. If the director determines that the grantee has demonstrated good cause for the delay, the department, in its sole discretion, may agree to an extended deadline. If the director determines that the grantee has not demonstrated good cause for the delay, the department may terminate the performance agreement and recover any grant moneys released to the applicant.

## 12. Termination.

- a. Termination for Convenience.** Either party may terminate this Agreement at any time prior to the expiration date of this Agreement upon 15 days of written notice to the other party. Upon termination under this Section 12.a by Grantee, Grantee shall repay Agency all amounts disbursed by Agency to Grantee under this Agreement. Upon termination by Agency, Agency will not be obligated to make payments for any work not completed by Grantee as of the date of the Notice of Termination.
- b. Agency Termination.** Agency may terminate this Agreement:
1. Immediately upon written notice to Grantee, if Agency does not obtain sufficient funding and expenditure authorizations to allow Agency to meet its payment obligations under this Agreement.
  2. Immediately upon written notice to Grantee if state or federal laws, regulations, or guidelines are modified, changed or interpreted in such a way that Agency does not have the authority to provide Grant Monies for planning the Project or no longer has the authority to provide the Grant Monies from the funding source it had planned to use.

## 13. General Provisions.

- a. Indemnification.** Grantee shall indemnify, defend (subject to ORS chapter 180), and hold harmless the State of Oregon and Agency and their officers, employees, and agents from all claims, suits, actions, losses, damages, liabilities, costs and expenses of any nature, resulting from, arising out of or relating to the activities of the Grantee or Grantee's officers, employees, sub-contractors, or agents under this Agreement.
- b. Amendments.** This Agreement may be amended only by a written instrument signed by both parties. Any such amendment is effective only when fully executed and approved as required by applicable law. Requests for amendments must follow the process outlined in [OAR 330-250-0140](#).
- c. Participation in Similar Activities.** This Agreement in no way restricts Grantee or Agency from participating in similar activities with other public or private agencies, organizations, or individuals, except that Grant Monies may not exceed 100 percent of the Planning Costs, when combined with other incentives or grants available to Grantee.
- d. No Third Party Beneficiaries.** The State of Oregon and Grantee are the only parties to this Agreement and are the only parties entitled to enforce its terms. Nothing in this Agreement gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly or indirectly, to a

third person unless such a third person is individually identified by name herein and expressly described as an intended beneficiary of the terms of this Agreement.

- e. **Notices.** Except as otherwise expressly provided in this Agreement, any notice to be given hereunder to a party shall be given in writing by personal delivery, facsimile, email, or mailing the same, postage prepaid, to that party's Agreement Administrator at the address or number set forth on page 1 of this Agreement. Any communication or notice so addressed and mailed shall be effective 5 days after mailing. Any notice delivered by facsimile shall be effective on the day the transmitting machine generates a receipt of the successful transmission, if transmission was during normal business hours of the recipient, or on the next business day, if transmission was outside normal business hours of the recipient. Any notice given by email shall be effective upon the sender's receipt of confirmation generated by the recipient's email system that the notice has been received by the recipient's email system. Any notice given by personal delivery shall be effective when actually delivered.

Either party may designate a different Agreement Administrator or change the contact information given herein by providing notice in the manner provided in this section and such change shall be effective without need for amendment under Section 13.b.

- f. **Governing Law, Consent to Jurisdiction.** This Agreement shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively, "Claim") between Agency (and any other agency or department of the State of Oregon) and Grantee that arises from or relates to this Agreement shall be brought and conducted solely and exclusively within the Circuit Court of Marion County in the State of Oregon. In no event shall this section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, from any Claim or from the jurisdiction of any court. Grantee hereby consents to the exclusive jurisdiction of such court, waives any objection to venue, and waives any claim that such forum is an inconvenient forum. If a Claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon.
- g. **Compliance with Law.** Grantee shall comply with all federal, state and local laws, regulations, executive orders and ordinances applicable to the Agreement or to the planning of the Project. All employers, including Grantee, that employ subject workers who provide services in the State of Oregon shall comply with ORS 656.017 and provide the required Workers' Compensation coverage, unless such employers are exempt under ORS 656.126(2). Grantee shall require each of its subcontractors, if any, to comply with, and shall ensure that each of its subcontractors, if any complies with, these requirements.
- h. **Public Records.** Grantee acknowledges that all information and records submitted to Agency are subject to the Oregon Public Records Law, ORS 192.311 to 192.478. If Grantee believes that any information or records it submits to Agency contain trade secrets, as defined by ORS 192.345(2), or are otherwise exempt from disclosure under the Oregon Public Records Law, Grantee must identify such information or records with particularity and describe the bases for Grantee's belief that the information or records are exempt from disclosure.

Funding from the State of Oregon may be reported on Oregon Transparency, a state agency tool available for Oregonians to learn about how state government works, taxes are used, and more. The information on this website is provided to users for general knowledge and information. It excludes



date and information that is confidential, protected, or private under state and federal laws, and is unaudited.

**i. Oregon False Claims Act.**

1. Grantee acknowledges that the Oregon False Claims Act, ORS 180.750 to 180.785, applies to any action or conduct by the Grantee pertaining to this Agreement that constitutes a “claim” (as defined by ORS 180.750 (1)). By its execution of this Agreement, the Grantee certifies the truthfulness, completeness, and accuracy of any statement or claim it has made, it makes, it may make, or causes to be made that pertains to this Agreement or the System for which the Agreement work is being performed. In addition to other penalties that may be applicable, Grantee further acknowledges that if it makes, or causes to be made, a false claim or performs a prohibited act under the Oregon False Claims Act, the Oregon Attorney General may enforce the liabilities and penalties provided by the Oregon False Claims Act against Grantee. Nothing in this section or this Agreement may be construed as limiting or derogating from any authority granted the Oregon Attorney General under 180.750 to 180.785.
2. Grantee shall immediately report in writing, to the Agency, any credible evidence that a principal, employee, agent, or subcontractor of the Grantee, or any sub-grantee or other person, has made a false claim or committed a prohibited act under the Oregon False Claims Act, or has committed a criminal or civil violation of laws pertaining to fraud, bribery, gratuity, conflict of interest, or similar misconduct in connection with this Agreement or moneys paid by the Agency under this Agreement.
3. Grantee must include subsections (i) through (ii) of this section in each subcontract or sub grant the Grantee may award in connection with the performance of this Agreement. In doing so, the Grantee may not modify the terms of those subsections, except to identify the subcontractors or sub grantee that will be subject to those provisions.

**j. Sensitive Information.** Except for information that is already a matter of public record, Grantee shall not publish or otherwise disclose, except to Agency or as otherwise required by law, any information or data obtained hereunder from private individuals, organizations, or public agencies in a publication wherein the information or data furnished by or about any particular person or establishment can be identified, except with the written consent of such person or establishment. Unless otherwise required by law, information concerning the business of Agency, its financial affairs, and its relations with its clients and employees, as well as any other information that may be specifically classified as confidential by Agency, shall be kept confidential. Grantee shall instruct its employees and subcontractors to keep such information confidential by using the same care and discretion that they use with similar information that the Grantee designates as confidential.

**k. Severability.** If any term or provision of this Agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if this Agreement did not contain the particular term or provision held to be invalid.

**l. Assignment of Agreement, Successors in Interest.** Grantee shall not assign or transfer any interest in this Agreement without the prior written approval of Agency. Any such assignment or transfer, if approved, is subject to such conditions and provisions, as Agency may deem necessary, including without limitation that Agency shall have reasonable access to the records and facilities of the assignee or transferee to the same extent as to the records and facilities of Grantee as described in Section 10 hereof. No approval by Agency of any assignment or transfer shall be deemed to create any obligation of Agency in addition to those set forth in this Agreement nor will Agency’s approval of an assignment or transfer relieve Grantee of any of its duties or obligations under this Agreement.

- m. **Headings.** The headings and captions to sections of this Agreement have been inserted for identification and reference purposes only and shall not be used to construe the meaning of or to interpret this Agreement.
- n. **Construction.** The parties agree and acknowledge that the rule of construction that ambiguities in a written agreement are to be construed against the party preparing or drafting the agreement shall not be applicable to the interpretation of this Agreement.
- o. **Independent Contractors.** The parties agree and acknowledge that their relationship is that of independent contracting parties and that Grantee is not an officer, employee, or agent of the State of Oregon as those terms are used in ORS 30.265 or otherwise.
- p. **Force Majeure.** Neither Agency nor Grantee shall be held responsible for delay or default caused by fire, civil unrest, natural causes or war which is beyond, respectively, the Agency's or Grantee's reasonable control. Each party shall, however, make all reasonable efforts to remove or eliminate such cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this Agreement.
- q. **Integration and Waiver.** This Agreement, including all Exhibits, constitutes the entire agreement between the parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Agreement. The delay or failure of either party to enforce any provision of this Agreement shall not constitute a waiver by that party of that or any other provision.
- r. **Survival.** All provisions of this Agreement set forth in the following sections shall survive termination of this Agreement: Sections 10, 13.a, and any other provisions that by their terms are intended to survive termination of this Agreement.

**Signatures on following page.**

THE PARTIES, by execution of this Agreement of their authorized representatives, hereby acknowledge that they have read this Agreement, understand it, and agree to be bound by its terms and conditions.

**GRANTEE**

**OREGON DEPARTMENT OF ENERGY**

By:  
*(Signature of Printed Name below)*

By:

\_\_\_\_\_  
*Danae Hammitt, Designated Procurement Officer      Date*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Michael Williams, Assistant Director      Date*

\_\_\_\_\_  
*Title*

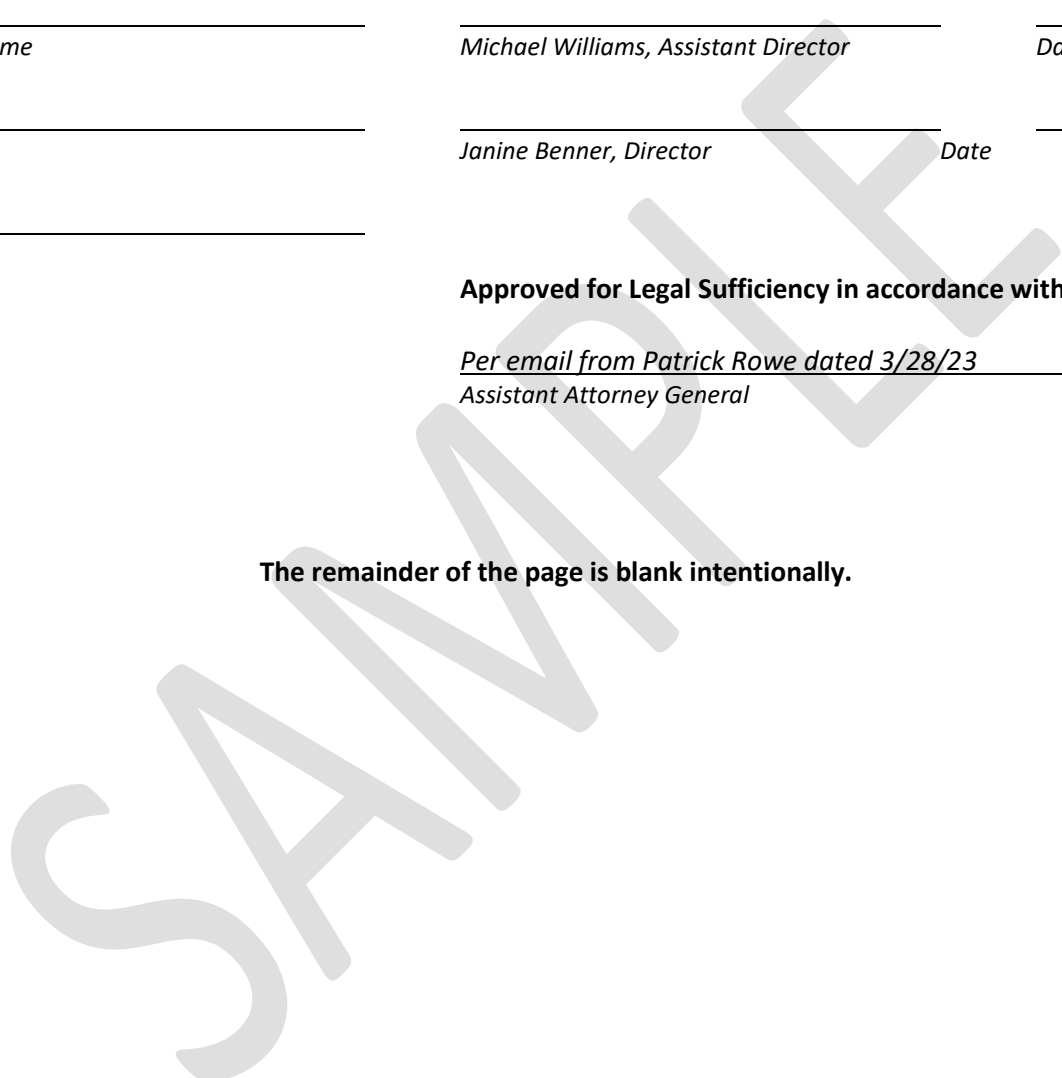
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*Janine Benner, Director      Date*

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*Date*

**Approved for Legal Sufficiency in accordance with ORS 291.047**

*Per email from Patrick Rowe dated 3/28/23*  
*Assistant Attorney General*

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**EXHIBIT A – PROJECT DESCRIPTION**

**Project Data:**

Application ID	
Contact Name	
Organization Name	
Organization Type	Public Body
Project Type	Community Energy Resilience Planning Project OA #01
ODOE PA Number	#XX-XXX

**Project Scope Baseline**

Project Address:	
Geo Coordinates [Lat/Long]	

Project site ownership and/or control details:	
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Project Planning Partners (List all)	
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**Anticipated Project Details**

Nameplate Capacity (kW) <i>(if known)</i>	
System Technologies	
Resource Description	
Operational Use Description	
Net-metered to Utility	

**Project Planning Schedule Baseline**

Project Start Date (Est)	
Project Completion Date (Est)	

\* Reference: [OAR 330-250-0080 \(2\)](#) & [OAR 330-250-0040 \(4\)\(a\)\(B\)](#)

**Project Planning Budget Baseline**

Total Planning Cost	
Total Grants/Incentives/Other Funding	
Projected ODOE Grant Awarded	
Total Funding	

\* Reference: [OAR 330-250-0080 \(2\)\(5\)\(a\)\(A-G\)](#) & [OAR 330-250-0050](#)

**Program Equity Priorities & Project Benefits**

Information contained below taken from Grantee’s application.

Involvement of and leadership by members of Environmental Justice communities	
Located in an Environmental Justice community	
Project will serve one or more Environmental Justice communities	
Project policy for using DBEs, Emerging SMB &/or Minority-Veteran Owned Businesses	
Project includes community outreach and stakeholder partnerships	
Project includes an Equity Framework	
Project provides direct energy cost savings to local families and small businesses	
Project will increase Economic Development	
Project anticipated to create jobs	
Project include Inclusive Hiring and Promotion policies	

\* *Reference: OAR 330-250-0080 (2)*

**Notes and Definitions:**

SAMPLE

## EXHIBIT C – REPORTING FORMS

### Quarterly Report Form

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Grant ID:

Grantee:

#### Quarterly Report

Reviewed Project Data: Yes? No?

Reviewed Project Scope Baseline: Yes? No?

Reviewed Schedule Baseline: Yes? No?

Reviewed Budget Baseline: Yes? No?

Scope Status: Remains same/Changed

If changed, provide details:

Schedule Status: On time/Not on time

If not on time, provide information:

Has planning been completed: Yes/No

If planning has completed, provide planning completion date:

Budget Status: Under budget/over budget

If not under budget, provide information:

Comments:



## Final Report Form

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Grant No: ODOE PA #XX-XXX

Grantee:

### Final Report

1. Was the project completed as specified in the performance agreement? Y/N
2. If project has completed, provide project completion date:

Please upload the following documentation:

1. CPA verification letter, if the total Planning Costs are \$50,000 or more.
2. A copy of the plan completed under the performance agreement which must include a proposal for developing a community renewable energy project that provides at a minimum the following details:
  - A description of how consultation with the following groups was incorporated into the planning:
    - Members of qualifying communities served by the proposed community renewable energy project;
    - Businesses located in the communities served by the proposed community renewable energy project;
    - Electric utilities that have customers in the communities served by the proposed community renewable energy project; and
    - Other regional stakeholders.
  - A description of the project that includes the following information:
    - An assessment of the suitability of the site.
    - A detailed description of the project including type and quantity of equipment, how the system will integrate into existing site or building conditions and any additional work needed.
    - If the project is for generating renewable energy:
      - Technical specifications of the selected technology.
      - Nameplate capacity (KW) of the entire project.
      - Projected amount of net energy the project will generate, in KWh per year for electricity generation or Btu for other types of energy.
      - A renewable resource assessment demonstrating adequate renewable resource availability for the proposed system operations that includes the data collected to support the assessment and any assumptions made.
    - If the project is for energy storage:
      - Technical specifications of the selected technology.
      - Nameplate power storage capacity in KW.
      - Projected amount of net energy the project will supply, in KWh per year.
      - Duration the project will provide backup for selected purposes.
      - Proposed operational use cases for the energy storage project.
  - A project management plan that includes:
    - A detailed construction plan and project schedule.

- A description of who would manage the planning, construction, and system start-up.
  - If applicable, a description of the community resilience aspects of the project.
  - A project budget that includes:
    - The anticipated total project cost with an itemized list of costs.
- 3. If a description of how disadvantaged business enterprises, emerging small businesses, or businesses that are owned by minorities, women, or disabled veterans would be involved in the planning of the Project was provided in the application, please provide proof of their involvement or a statement of why they were not involved.
- 4. If they pay property taxes, proof that Grantee or owner of the proposed Project’s location, if other than Grantee, is current on the property taxes for the Project’s location.
- 5. An itemized list of the incurred costs associated with:
  - Consulting fees
  - Load Analysis
  - Siting, excluding property acquisition
  - Ensuring code compliance
  - Interconnection studies
  - Transmission studies
  - Other expenditures

**Financial Summary**

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The Grant amount is initially calculated based on Grantee’s estimate of the total Planning Costs. Agency will withhold the final payment of the estimated grant funds, up to 100 percent, until submission of the Final Report. Upon receipt of the Final Report, Agency will recalculate the Grant amount using actual Planning Costs, and Agency’s disbursement of the Grant Monies may be reduced as a result. So that Agency may calculate the disbursement, provide the following information:

**Actual Total Planning Cost:** \$  
*(replaces the “Estimated Planning Cost” from Grantee’s application)*

**Other Government Incentives & Grants Available:** \$  
*(directly related to the Project; not including this Grant; identify source(s) and amount(s))*

**Prepared By:** Name, Title  
**Date Prepared:** MM/DD/YYYY

**EXHIBIT D****Financial Reporting Guidance**

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Promptly following completion of the project planning, the Grantee must submit an account of total Planning Costs that identifies all funding sources and includes all receipts, paid invoices, cancelled checks (if applicable), and bank loan or promissory note documentation. It should also include an itemized list of equipment and incurred Planning Costs. If they pay property taxes, Grantee must also provide proof that Grantee or owner of the Project location, if other than Grantee, is current on the property taxes for the Project's location. If the total Planning Costs are \$50,000 or more, Grantee must include an independent Certified Public Accountant's attestation to the validity and accuracy of the account. The following guidance is intended to help Grantee comply with these requirements.

**A. Total Planning Costs** (Grantee should provide this guidance to the Certified Public Accountant responsible for verifying cost and payments.)

"Planning costs" means the costs related to planning paid by an applicant described under Oregon Laws 2021, chapter 508, section 30.

To verify the total Planning Costs that received a Community Renewable Energy Program (CREP) grant from the Oregon Department of Energy, you must be a Certified Public Accountant with a current license who is **NOT** an employee or affiliate of the Grantee or a partner listed on the grant application.

Obtain the following documents to complete your verification:

- A copy of the Grantee's Performance Agreement (the project planning must comply with all conditions of the Performance Agreement).
- All receipts, paid invoices, cancelled checks (if applicable), and bank loan or promissory note documentation that pertains to planning the Project.
- A copy of the applicable Oregon Administrative Rules (OAR). The permanent rules related to Community Renewable Energy Program grants can be found here:  
<https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=6901>

Verify and document the following information:

- The actual total Planning Costs (regardless of whether the costs are eligible for CREP grants).
- The actual total **eligible** Planning Costs. These are the costs that concur with the "Project Description" in the Performance Agreement and that are eligible costs according to [OAR 330-250-0050](#).
- The total amount of the payments made by the Grantee.
- An itemization of all financial incentives and grants received for planning the Project by the Grantee or any affiliate (e.g., utility incentives, Energy Trust of Oregon incentives, federal tax credits, grants, etc.).
- The planning completion date. This is the date on which the planning document was completed.
- The date the planning was paid for in full (paid outright or loan contracts were fully executed).

**B. Property Tax Status.** If they pay property taxes, provide proof that Grantee or owner of the proposed Project's location, if other than Grantee, is current on the property taxes for the Project's location. This can be provided in the form of a receipt or statement indicating no balance is due.