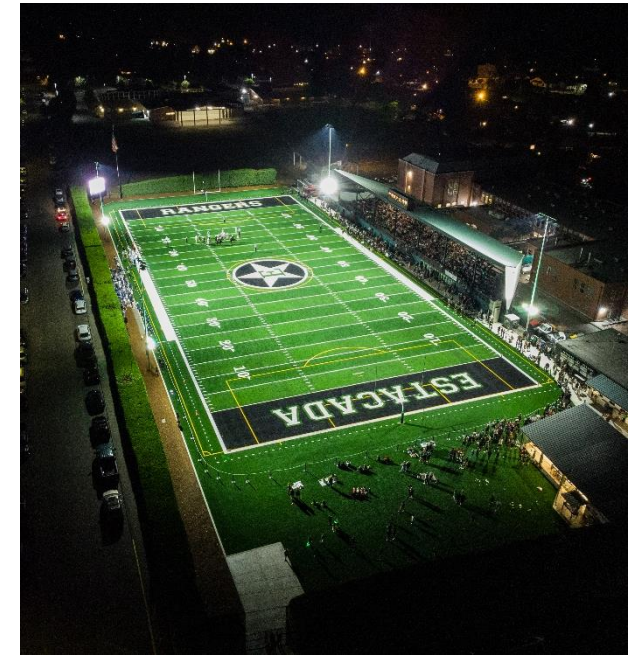


Public Purpose Charge (SB 1149) Schools Program 2024 Outreach

Oregon Department
of Energy & Energy
Trust of Oregon



Football Field lighting projects at West Linn HS and Estacada HS



OREGON
DEPARTMENT OF
ENERGY



WORKING TOGETHER FOR SCHOOLS

Christie Sphoon
Oregon Department of Energy

Tracy Richardson
Oregon Department of Energy

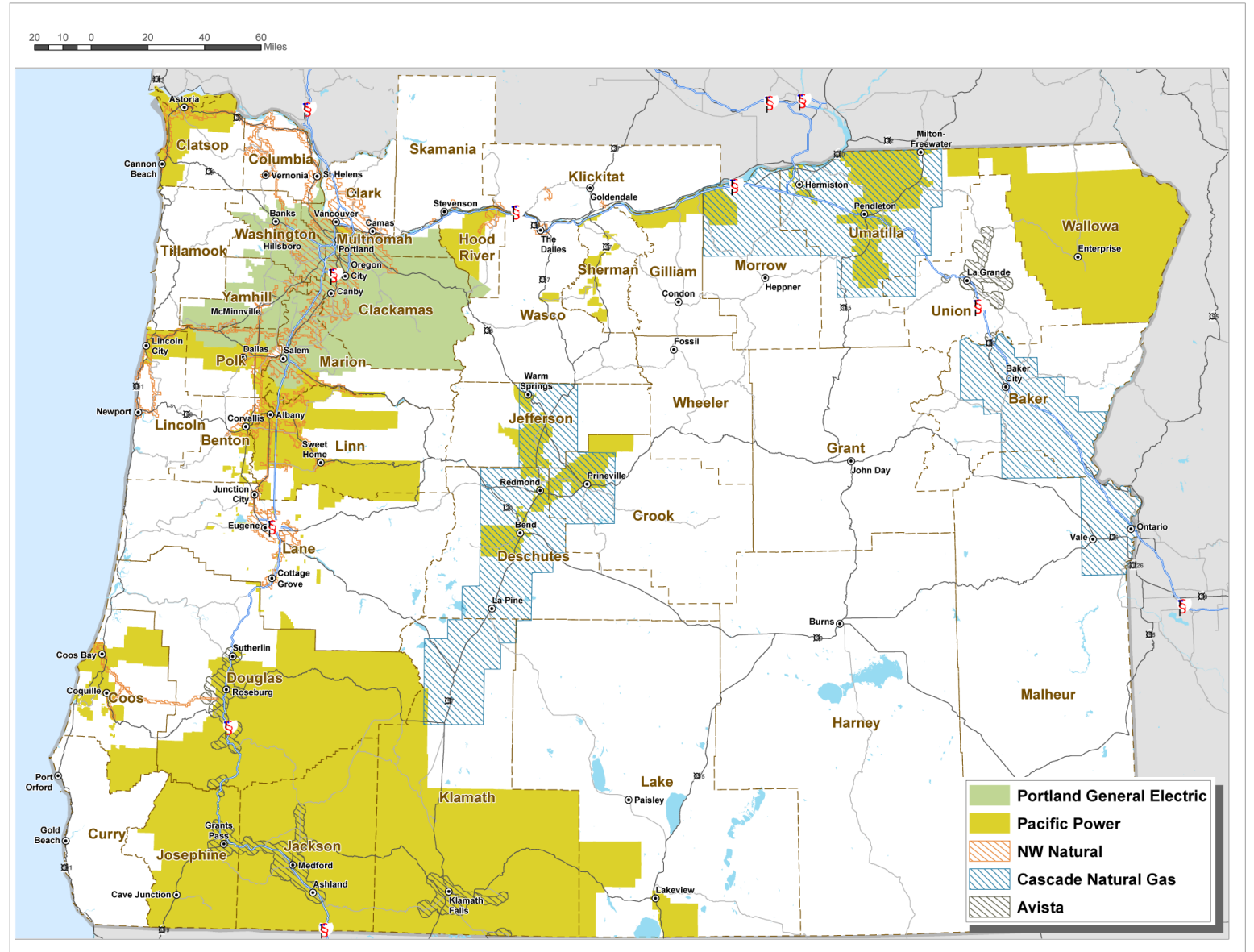
Christina Skellenger
Energy Trust of Oregon, Existing Buildings program

Colin Podelnyk
Energy Trust of Oregon, Existing Buildings program

Brian Morrison
Energy Trust of Oregon, Lighting Specialist



INVESTOR-OWNED UTILITY TERRITORY MAP



Key Elements

ODOE SB 1149 Schools Program

- Districts in Pacific Power and PGE territories
- PPC or SB 1149 funds sent directly to Districts each month through January 01, 2036
- Districts annual eligible percentage of funds based on educational facilities within territories and students counts
- Eligible expenditures:
 - Energy audits or Fleet Audits
 - Energy efficiency measures
 - Zero emission vehicles (including buses)
 - Electric vehicle chargers
- Energy measures need to be analyzed and have energy savings to be eligible

Energy Trust of Oregon (Existing Buildings)

- Districts in Pacific Power, PGE, NW Natural, Cascade, Avista territories
- All facility types are eligible
- Incentive types:
 - Standard Incentives
 - Lighting Incentives
 - Custom Incentives
- Incentive types details below

Key Elements

ODOE SB 1149 Schools Program

- SB 1149 max reimbursement is based on measure life x annual energy savings
- Funds considered reimbursement after project completion and final cost data submitted to ODOE
- Funding can be approved based on estimated future SB 1149 funds through end of program, until Districts are considered “Spent out of SB 1149 funds”
- Reimbursements are tracked by Districts

** While not required, ODOE recommends reimbursement funds transfer to bond, maintenance, or facility fund to continue additional projects*

- Annual reporting includes electric bills for eligibility, utility data for eligible facilities and reporting of account balances

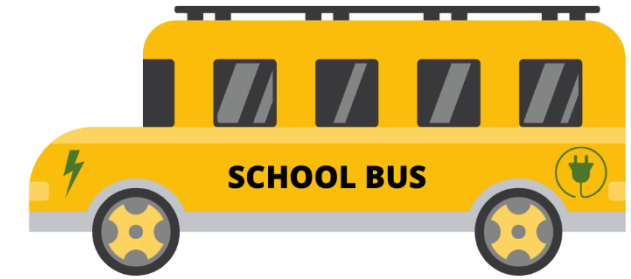
Energy Trust of Oregon (Existing Buildings)

- Funding based on cost effectiveness, energy savings
- Incentives paid upon completion of project and submittal of final invoices

SB 1149 FLEET AUDITS, ZERO EMISSION VEHICLES & CHARGERS

* Fleet Audit and Forms available on ODOE website

Expenditure Type	SB 1149 Eligible Amount for Reimbursement
Electric Vehicle Charger	Full cost for Level 1 & 2 chargers, DC Fast Chargers reviewed by ODOE
Battery Electric Light Duty Vehicle	Up to \$20,000
Plug in Hybrid Light Duty Vehicle	Up to \$15,000
Type A Electric Bus	Up to \$250,000
Type C/D Electric Bus	Up to \$300,000



* SB 1149 eligible amounts not to exceed 100% of cost with any other grants, incentives, etc. See forms online for MSRP max values for Qualifying Vehicles. Eligible amounts will be reviewed by ODOE periodically and may change.

ENERGY TRUST OF OREGON 2024 CHANGES

Project	Incentive
Steam traps	\$400 for repair, \$500 for replacement
Roof insulation	\$2.85 per square foot
Pipe insulation	\$25 per linear foot (<u>this incentive may be able to pay for the entire project!</u>)
Wall insulation	\$1.30 per square foot
Boiler	\$6.50 per kBtu
Water heater	\$3.50 per kBtu
Controls & HVAC upgrades	Potentially up to double the incentive in 2024
Retro-commissioning	Can cover up to 90% of project cost
Lighting	2024 is a great time to complete lighting projects – see me for details
Pool covers	Please see me for details.
Kitchen equipment	Incentives for hood vents, dishwashers, food conveyers, etc.
Greenhouses	Please see me for details.

[Existing Buildings: Oregon Cash Incentives - Energy Trust of Oregon](#)



LIGHTING

House Bill 2531

- Ban Sale and Distribution of Fluorescent Lighting
 - Key Benefits – reduce mercury exposure and increase energy efficiency
 - Jan 1, 2024 – Screw-in CFLs & Bayonet Lamps
 - Jan 1, 2025 – Linear Fluorescent & Pin base CFLs



LIGHTING

- **Recommendations**

- Evaluate Facility Lighting
- Prioritize Projects
- Plan conversions over the next two year
- Partner with Energy Trust & SB 1149 Program to maximize funding
- Meet with Team for support
- Approve 2025-26 projects before July 1st, 2025, to lock in incentives
- SB 1149 Program Lighting will continue through Jan. 1st, 2036, but process may look different



LIGHTING

- 2024 incentives – to be released in February
- OSFMA Annual Conference presentation – attend for additional info
- WE ARE HERE TO HELP!



PROCESS OVERVIEW: STANDARD INCENTIVES

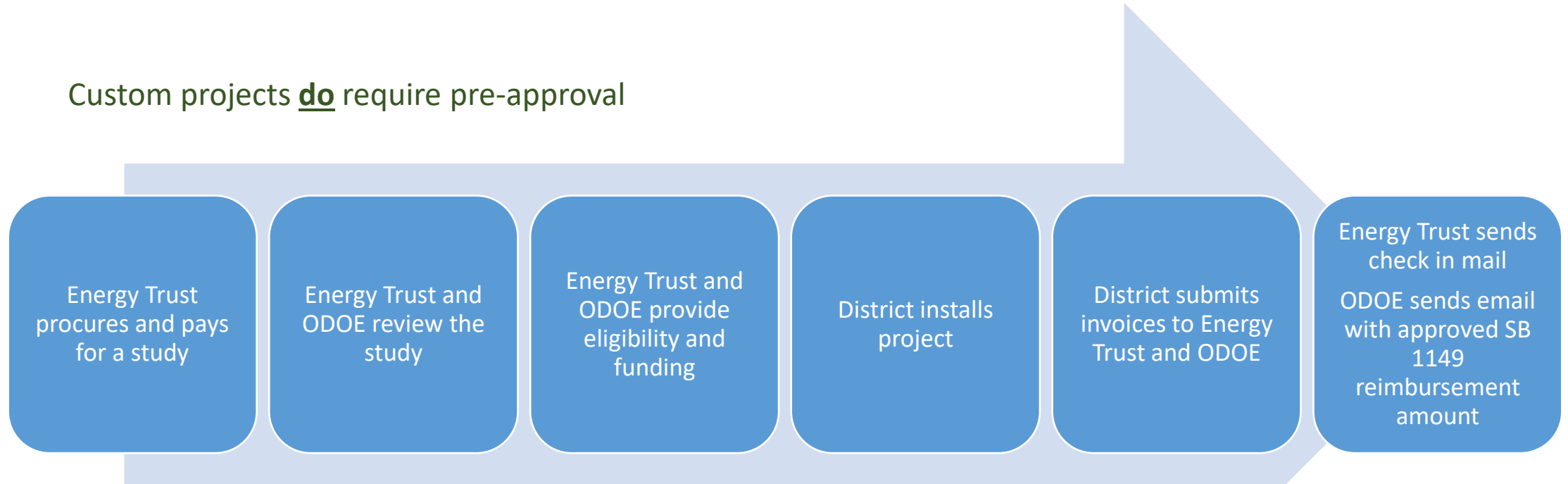
Equipment eligible for standard incentives do **not** require pre-approval



Examples of equipment eligible for standard incentives:
insulation, steam traps, water heaters, boilers,
modulating boiler burners, and more.

PROCESS OVERVIEW: CUSTOM

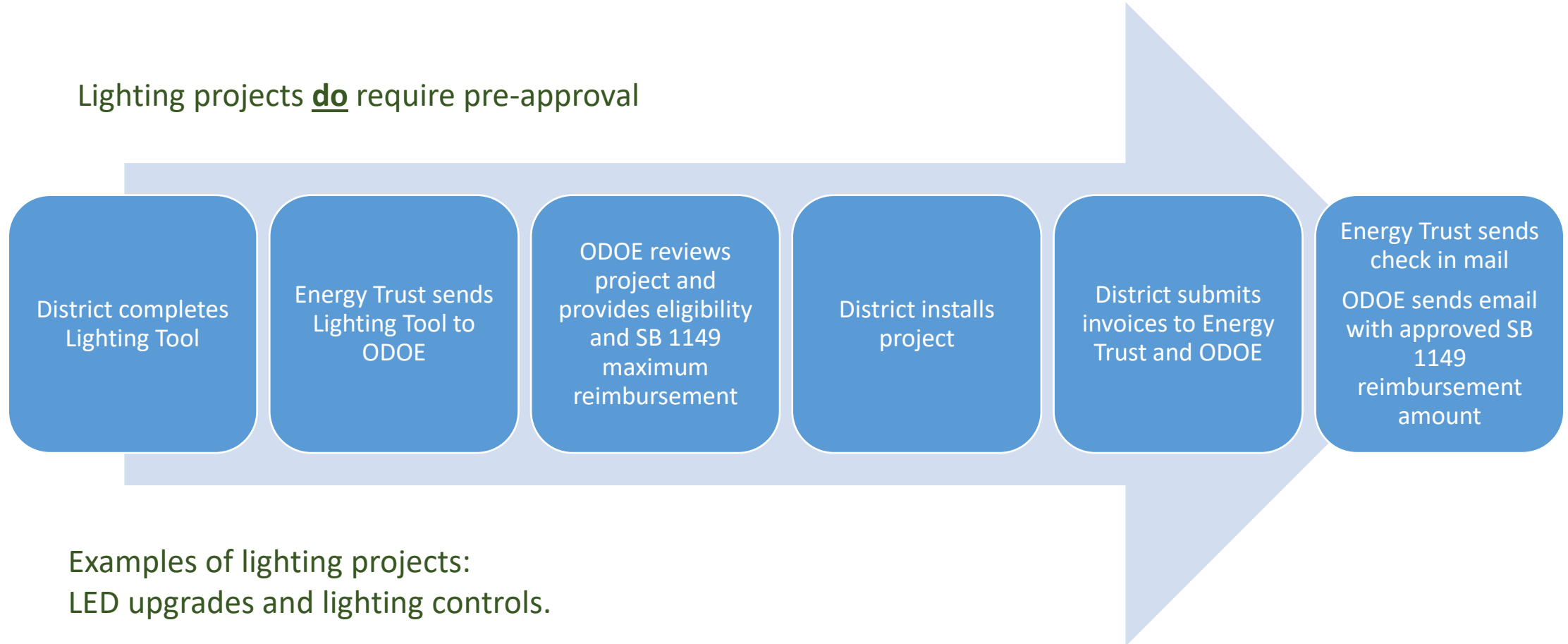
Custom projects **do** require pre-approval



Examples of Custom projects:
controls upgrades, HVAC upgrades, retro-commissioning,
pool boilers, and more.

PROCESS OVERVIEW: LIGHTING

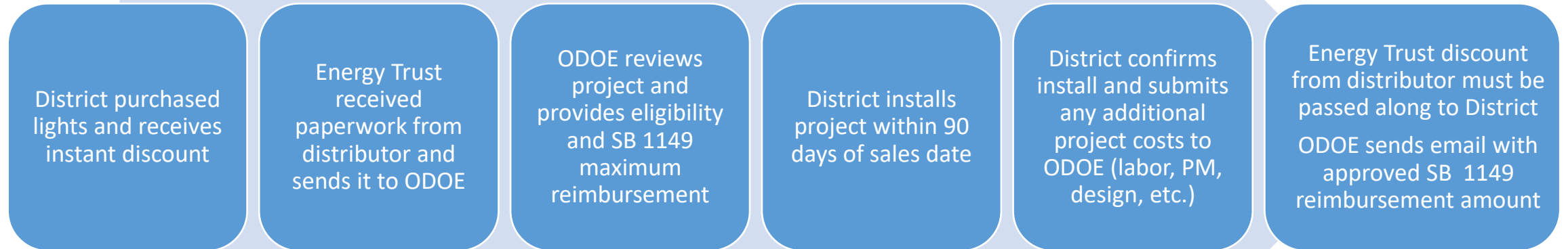
Lighting projects **do** require pre-approval



Examples of lighting projects:
LED upgrades and lighting controls.

PROCESS OVERVIEW: LIGHTING (INSTANT DISCOUNT)

Lighting projects do **NOT** require pre-approval if incentive is under \$2,500



Examples of lighting projects:
LED upgrades.

EXAMPLE OF COMBINED FUNDING

Example: Project Cost is higher than SB 1149 max reimbursement


Measure Description	Estimated Cost	SB 1149 Maximum Reimbursement	Energy Trust Incentive	SB 1149 Funds	SB 1149 Funds + Energy Trust Incentive	Net Cost to the District
Controls Upgrade	\$250,000.00	\$150,000.00	\$50,000.00	\$150,000.00	\$200,000.00	\$50,000.00

Example: Project Cost is less than SB 1149 max reimbursement

Measure Description	Estimated Cost	SB 1149 Maximum Reimbursement	Energy Trust Incentive	SB 1149 Funds	SB 1149 Funds + Energy Trust Incentive	Net Cost to the District
Lighting Upgrade	\$75,000.00	\$150,000.00	\$25,000.00	\$50,000.00	\$75,000.00	\$0.00

SB 1149 PROGRAM COMMUNICATIONS

- Funding Summary and Notice of Measure Eligibility PDFs



Energy Trust and SB 1149 Funding Summary

School District Name, School Name

Below you will find a summary of the funding that comes from Energy Trust and the School District's SB 1149 Funds. Since the Energy Trust incentives are estimated, please confirm final incentive amounts prior to submitting for the SB 1149 Funds reimbursement.

Vision Project Number: ETPC1023910593545


EEM	Measure Description	Estimated Cost	Maximum SB 1149 Reimbursement*	Energy Trust Incentive	SB 1149 Funds applied to measure	SB 1149 + Energy Trust Incentive applied to measure	Net Cost to the District	Cx Required**
EEM 1: DDC	DDC Upgrade	\$400,000.00	\$200,000.00	\$100,000.00	\$200,000.00	\$300,000.00	\$100,000.00	Yes

* Maximum reimbursement is the measure life in years multiplied by the annual energy savings in dollars, not to exceed the total project cost. If the maximum reimbursement is higher than the estimated cost of the measure, ODOE will approve up to 100% of the total project cost, including any Energy Trust Incentives.

** Commissioning (Cx) is required for specific measures for the SB 1149 Schools Program. For any required Cx or Retro-Cx measures identified, School Districts must use a Qualified Commissioning Firm. Cx requirements and Qualified Commissioning Firms are listed on ODOE's website.

Questions? Please contact:
 Christina Skellenger
 Outreach Manager
 Energy Trust of Oregon
 503.320.4617
Christina.Skellenger@icf.com

Christie Sphoon
 Schools Program Lead
 Oregon Department of Energy
 503.373.7430
Christie.L.Sphoon@oregon.gov



Notice of Measure Eligibility

ODOE has reviewed the measure details included in either the Energy Trust Prescriptive Application or the Energy Trust Lighting Tool for [School Name] within [School District Name] and have entered the measures into the Schools Interactive Database for the Public Purpose Charge (SB 1149) Schools Program. These were entered as targeted audit completed [Month Year].

Audit Measure Details

School	Measure Class	Measure Description	Estimated Cost	Simple Payback	Estimated Life	Estimated Dollar Savings	Maximum SB 1149 Reimbursement *	Cx Required **	Eligible
School	Lighting	Exterior lighting upgrade to LED	\$6,717	9.7 yrs	18 yrs	\$692	\$12,455.82	No	Yes
School	Lighting	Parking lot lighting upgrade to LED	\$4,986	6.2 yrs	18 yrs	\$802	\$14,442.66	No	Yes

Funding Summary

Below you will find a summary of the funding that comes from Energy Trust and the School District's SB 1149 Funds. Since the Energy Trust incentives are estimated, please confirm final incentive amounts prior to submitting for the SB 1149 Funds reimbursement.

School	Measure Class	Measure Description	Estimated Cost	Maximum SB 1149 Reimbursement **	Energy Trust Incentive	SB 1149 Funds	Net Cost to the District
School	Lighting	Exterior lighting upgrade to LED	\$6,717.00	\$12,455.82	\$2,760.00	\$3,957.00	\$0.00
School	Lighting	Parking lot lighting upgrade to LED	\$4,986.00	\$14,442.66	\$2,520.00	\$2,466.00	\$0.00

* Maximum SB 1149 reimbursement is the measure life in years multiplied by the annual energy savings in dollars, not to exceed the total project cost. If the maximum SB 1149 reimbursement is higher than the estimated cost of the measure, ODOE will approve up to 100% of the total project cost, including any Energy Trust incentives.

** Commissioning (Cx) is required for specific measures for the SB 1149 Schools Program. For any required Cx or Retro-Cx measures identified, School Districts must use a Qualified Commissioning Firm. Cx requirements and Qualified Commissioning Firms are listed on [ODOE's webpage](#).

Now that your measures are entered into the Schools Database, check out the [Audit Measure Implementation flowchart](#) for next steps within the SB 1149 Schools Program to install these measures and submit for SB 1149 Reimbursement! Please work with Christina Skellenger, with Energy Trust on next steps for the Energy Trust incentives.

Questions? Please contact:

Christie Sphoon Schools Program Lead Oregon Department of Energy 503.373.7430 Christie.L.Sphoon@oregon.gov	Christina Skellenger Outreach Manager Energy Trust of Oregon 503.320.4617 Christina.Skellenger@icf.com
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SB 1149 PROGRAM COMMUNICATIONS

- Once all final costs have been reviewed by ODOE and entered into Schools Database, an email approving SB 1149 funds is sent.

Subject SB 1149 funds for reimbursement, School District, School

SD Contact,

We have received the final Energy Trust Standard application, Energy Trust lighting tools and final cost documentation. The Standard application measure has been added as an eligible EEMs in the Schools Database. The Notice of Measure Eligibility PDF is attached for your files. The final costs below were also entered into the Schools Database.

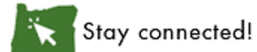
The District is now eligible to reimburse \$50,485.00 from the District's SB 1149 funds.

School	Measure Description	Maximum SB 1149 Reimbursement	Final Cost	Energy Trust Incentive	SB 1149 Funds applied to measure	Net Cost to the District
Middle School	Install 2 (199 kBtu) high efficient water heaters	\$13,485.00	\$14,890.00	\$1,190.00	\$13,485.00	\$215.00
Elementary School	Interior Lighting Upgrade to LEDs	\$70,250.00	\$52,000.00	\$15,000.00	\$37,000.00	\$0.00
Totals			\$66,890.00	\$16,190.00	\$50,485.00	\$215.00

Please let me know if you have any questions or need anything else for your records.



Christie Spoon
 Schools Program Lead
 550 Capitol St. NE, 1st Floor
 Salem, OR 97301
 P: 503-373-7430
 P (In Oregon): 800-221-8035



HOW TO GET STARTED

1. Contact Christie at ODOE or Christina/Colin at Energy Trust
2. Send an email that grants consent for ODOE/Energy Trust to share info:

By this email, I confirm that I am authorized on behalf of [School District] to grant this consent and do hereby authorize Energy Trust and Oregon Department of Energy to share information about the District's energy efficiency measures and projects for the purpose of maximizing potential SB 1149 Schools Program funds and Energy Trust incentives. This consent specifically authorizes and directs Energy Trust to disclose and deliver the District's electric and/or natural gas utility account monthly and aggregate energy usage information, associated with the District's school(s) participating in Energy Trust's program(s), directly to the Oregon Department of Energy on the District's behalf for the purpose of informing energy savings analysis and coordinating potential SB1149 Schools Program and Energy Trust funding amounts that may be available for potential energy saving measures at such District school(s). I further understand and agree that this authorization shall remain in effect for District's participating school(s) until such time as the District notifies in writing via an email to gcnotice@energytrust.org, that the District is revoking this consent.

3. Work with ODOE to verify school facilities have met audit requirement.
4. Work with Energy Trust to determine which incentive path you will need to follow (standard, custom, lighting).

2024 UPCOMING EVENTS

Event	Date/Time	Link
Public Purpose Charge (SB 1149) Schools Program - 2024 Informational webinar (repeat of webinar)	January 24, 10am – 11am	https://www.oregon.gov/energy/energy-oregon/Pages/SB1149-Program-Guidelines.aspx
Bonds, Ballots and Buildings Conference * ETO attending Trade Show with booth	February 16	https://osba.org/bonds-ballots-and-buildings-conference/
Oregon School Facility Management Association (OSFMA) Conference *ODOE and ETO attending Trade Show with booth(s)	April 17 – 18	https://www.osfma.org/
OPTA Conference * ODOE attending Trade Show with booth	June 17 - 20	https://www.optaschoolbus.org/events/save-the-date-2024-opta-summer-conference-and-trade-show
OASBO Conference *ODOE and ETO attending Trade Show with booth(s)	July 24 – 26	https://oasbo.com/

CONTACT US



Christie Sphoon

Schools Program Lead
Oregon Department of Energy

550 Capitol Street N.E., 1st Floor
Salem, OR 97301

Christie.I.sphoon@energy.oregon.gov
503.689.0500 **DIRECT**
Oregon.gov/energy



Christina Skellenger, CEM

Schools Energy Advisor
Existing Buildings

Account Manager for public K-12 Schools in all areas except Southern Oregon and Eastern Oregon

christina@skellengerco.com
971.275.3395 **DIRECT**
energytrust.org



Tracy Richardson

Program Assistant
Oregon Department of Energy

550 Capitol Street N.E., 1st Floor
Salem, OR 97301

Tracy.richardson@energy.oregon.gov
503.385.3444 **DIRECT**
Oregon.gov/energy



Colin Podelnyk, CEM

Energy Advisor
Existing Buildings

Account Manager for public K-12 Schools in Southern Oregon and Eastern Oregon

colin@skellengerco.com
971.284.9071 **DIRECT**
energytrust.org