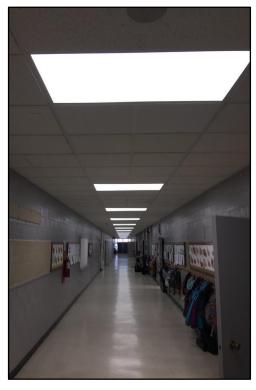
Public Purpose Charge (SB 1149) Schools Program 2022 Outreach

Oregon Department of Energy & Energy Trust of Oregon







Grants Pass SD Lighting Projects





WORKING TOGETHER FOR SCHOOLS

Christie Sphoon

Oregon Department of Energy

Christina Skellenger

Energy Trust of Oregon, Existing Buildings program

Colin Podelnyk

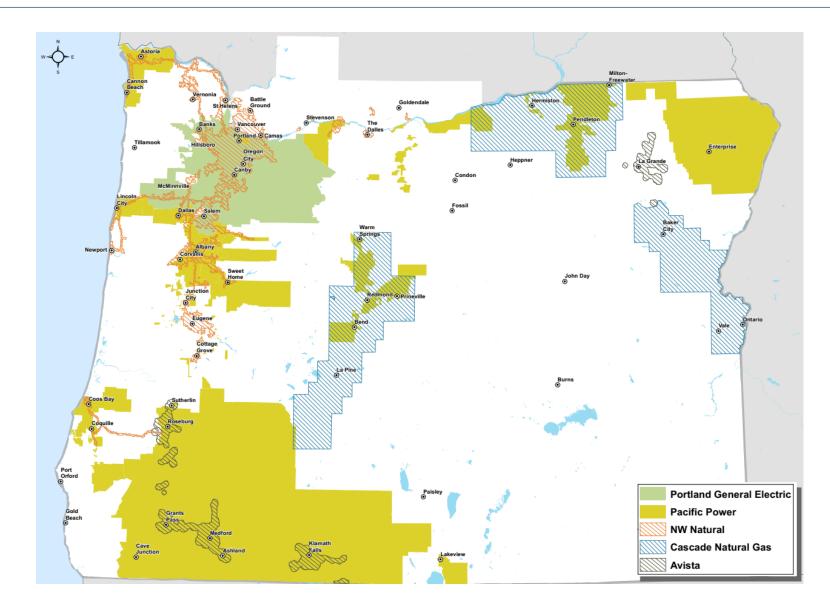
Energy Trust of Oregon, Existing Buildings program







INVESTOR-OWNED UTILITY TERRITORY MAP







SB 1149 & ENERGY TRUST OF OREGON

SB 1149 Schools Program	Energy Trust of Oregon (Existing Buildings)
Pacific Power and PGE territories	Pacific Power, PGE, NW Natural, Cascade, Avista territories
SB 1149 funding distributed monthly based on eligible facilities and student counts	
Energy measures need to be calculated/analyzed and have energy savings to be eligible	 Incentive types: (described in more detail below) Standard Incentives Lighting Incentives Custom Incentives
SB 1149 funding for energy measures is based on measure life x annual energy savings	Funding based on cost effectiveness, energy savings
SB 1149 funding for some energy measures can pay up to 100% of project costs	Funds can pay up to 65-75% of total project costs





SB 1149 & ENERGY TRUST OF OREGON

SB 1149 Schools Program	Energy Trust of Oregon (Existing Buildings)
 Funds can be used for: Energy audits within educational facilities Fleet audit of eligible school districts Energy efficiency measures Zero emission vehicles (including buses) Electric vehicle chargers 	Can fund energy projects for any facility type
SB 1149 funding considered reimbursement after project completion and final cost data submitted to ODOE	Incentives paid upon completion of project and submittal of final invoices



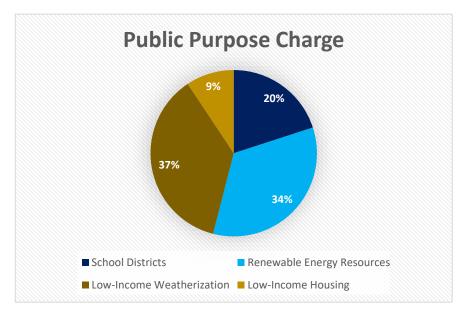


SB 1149 PROGRAM CHANGES

Effective January 1, 2022, due to HB 3141:

* Public Purpose Charge changed from 3% on electric bills to 1.5%

- * Percentage of funds also changed to:
 - school districts 0.3% of 1.5% (20%)
 - renewable energy resources 0.51% of 1.5% (34%)
 - low-income weatherization 0.55% of 1.5% (36.7%)
 - low-income housing 0.14% of 1.5% (9.3%)



* Public Purpose Charge now goes through January 01, 2036





SB 1149 PROGRAM CHANGES

What this means for your School District:

- * Public Purpose Charge (SB 1149) Schools Program now goes through January 01, 2036.
- * School districts will receive similar revenues as previously.
- * School districts will continue to receive monthly Public Purpose Charge revenue payments from your electric utility through January 01, 2036.
- * School districts that were considered "Spent out of SB 1149 funds", may no longer be spent out of funds and need to work with ODOE to verify estimated SB 1149 funds.





ENERGY TRUST OF OREGON PROGRAM CHANGES

Existing Building Program Changes

* Incentive cap increased to \$250,000 per site, per year

Lighting Program Changes

- * Incentive caps increased to \$250,000 per site, per year (as of March 21, 2022)
- * NEW Instant Discount offering purchase lights directly from the distributor and earn an Energy Trust discount at the time of purchase

You can find the most current information and all announcements related to the Existing Building program and Business Lighting program by clicking on the below links:

Energy Trust Insider - Energy Trust increases business lighting incentives and caps

Energy Trust Insider - New bonus for gas-saving equipment

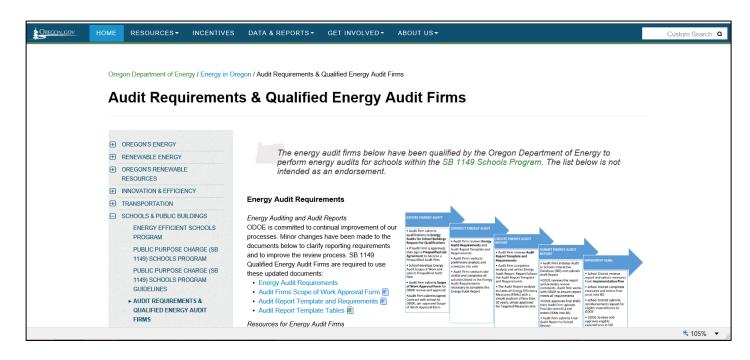




Prequalified Energy Audit Firms and SB 1149 Program Audit Report and

Audit Requirements

 Some school districts may still need to complete a whole building audit







https://www.oregon.gov/energy/energy-oregon/Pages/Schools-Audit-Firms.aspx

Fleet audits, electric vehicles and electric vehicle chargers

Step 1: Complete and Submit Fleet Audit

Complete fleet audit spreadsheet available on ODOE website and submit to ODOE

Step 2: Complete and Submit Form for Vehicle/Charging Station Type

Complete Light Duty Vehicle and Charging Station Form or Electric Bus and Bus Charging Form on ODOE website and submit to ODOE







https://www.oregon.gov/energy/energy-oregon/Pages/Public-Purpose-Charge-(SB-1149)-Fleet-Audits-Electric-Vehicles-and-Charging-Stations.aspx

Fleet audits, electric vehicles and electric vehicle chargers

Step 3: ODOE Review of Forms

ODOE will review forms for completeness and will request any additional info. Once reviewed and approved, ODOE will add an eligible measure to Schools Database and send Notice to school district

Step 4: Submit Confirmation of Purchase/Lease to ODOESchool district to submit final cost information to ODOE for review. ODOE will review and notify school district of eligible amount of SB 1149 funds for reimbursement







Fleet audits, electric vehicles and electric vehicle chargers

Eligible SB 1149 funds for reimbursement:

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. Eligible amounts will be reviewed by ODOE periodically and may change. Please review most current forms on ODOE's website for most current amounts.





WORKING WITH ENERGY TRUST & ODOE

Energy Trust process:

- Standard Incentives
 - Do NOT require pre-approval
 - Complete application post-construction
 - Projects may include boilers, hot water heaters, insulation, steam traps, boiler burners, mini-splits
- Lighting
 - Requires pre-approval
 - Complete lighting tool prior to procurement and construction
 - Lighting projects include LED upgrades and lighting controls
- Custom
 - Requires a Technical Analysis Study
 - Study must be completed prior to procurement and construction
 - Projects may include controls upgrades, HVAC upgrades, retro-commissioning, pool boilers





PROCESS OVERVIEW: STANDARD INCENTIVES

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

District installs project

District completes Energy Trust application Energy Trust sends
ODOE completed
Energy Trust
application

ODOE reviews project and provides eligibility and SB 1149 maximum reimbursement Energy Trust sends check in mail

ODOE sends email with approved SB 1149 reimbursement amount

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





ENERGY TRUST OF OREGON, EXISTING BUILDING PROGRAM STANDARD BONUSES (AS OF MARCH 1, 2022)

To qualify for bonus incentives, equipment must be purchased on or after March 1, 2022, and installed on or before September 30, 2022.

Standard Commercial Buildings Bonuses - Oregon

Measure	Base Incentive	Bonus Incentive	Total Incentive
Steam Traps	\$100/trap	\$200/trap	\$300/trap
Gas Steam Cooker	\$2000/cooker	\$1000/cooker	\$3000/cooker
Pipe Insulation (per linear foot)	\$4-12/LF	\$9-3/LF	\$15/LF
Commercial Condensing Tank Water Heater	\$3/kbtu/hr	\$0.35/kbtu/hr	\$3.35/kbtu/hr
Commercial Condensing HVAC Boiler	\$3.25/kbtu/hr	\$3.75/kbtu/hr	\$7/kbtu/hr





PROCESS OVERVIEW: CUSTOM

Custom projects **do** require pre-approval

Energy Trust procures and pays for a study

Energy Trust and ODOE review the study

Energy Trust and ODOE provide eligibility and funding

District installs project

District submits invoices to Energy Trust and ODOE

check in mail
ODOE sends email
with approved SB
1149
reimbursement
amount

Energy Trust sends

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





ENERGY TRUST OF OREGON, EXISTING BUILDING PROGRAM CUSTOM BONUSES (AS OF MARCH 1, 2022)

Custom Commercial Bonuses - Oregon*

Custom project bonus incentives are available for any projects that have an incentive offer issued and signed between March 1 and December 31, 2022.

Bonus	Base Rate	Bonus Rate	Total Rate
Commercial Buildings Custom Rate	\$3/therm	\$1/therm	\$4/therm
Multifamily Custom Rate	\$2/therm	\$1/therm	\$3/therm

^{*} Excludes RCx measures which have a different incentive rate

Retro commissioning (RCx) Commercial Bonus - Oregon*

To qualify for **RCx bonus incentives**, projects must have an incentive offer issued on or after March 1, 2022, and the project must complete and submit all final project closeout paperwork no later than December 31, 2022.

Bonus	Base Project Cost Cap	Bonus Project Cost Cap
RCx	60%-75%	100%

^{*} Energy Trust normally pays an incentive of 60-75% of base project cost for qualifying RCx projects. During the limited-time bonus incentive offering, Energy Trust will pay an incentive of up to 100% of eligible RCx project costs.





PROCESS OVERVIEW: LIGHTING

Lighting projects **do** require pre-approval

District completes
Lighting Tool

Energy Trust sends
Lighting Tool to
ODOE

ODOE reviews
project and
provides eligibility
and SB 1149
maximum
reimbursement

District installs project

District submits invoices to Energy Trust and ODOE

check in mail
ODOE sends email
with approved SB
1149
reimbursement
amount

Energy Trust sends

Examples of lighting projects: LED upgrades and lighting controls.





ENERGY TRUST OF OREGON, BUSINESS LIGHTING PROGRAM INCENTIVE INCREASES (AS OF MARCH 21, 2022)

- Allowable percentages of incentives to total project costs increased to:
 - 50% for all custom projects (does not include controls)
 - 70% for lighting measures with integrated LLLC
- Calculated custom incentives for horticultural lighting and controls increased to \$0.18 per kWh saved
- Selected standard lighting incentives increased as follows:
 - LED high-bay/low-bay fixtures (with or without LLLCs)
 - 40-90W \$100 per fixture, or \$155 per fixture with LLLC
 - 91-140W \$150 per fixture, or \$215 per fixture with LLLC
 - 141-299W \$175 per fixture, or \$250 per fixture with LLLC
 - 300W or greater \$250 per fixture, or \$355 per fixture with LLLC
- Fixture mount occupancy controls increased to \$40 per sensor
- Interior fixtures with LLLC incentives increased as follows:
 - 26-57W \$80 per fixture with LLLC
 - 58-100W \$85 per fixture with LLLC





PROCESS OVERVIEW: LIGHTING (INSTANT DISCOUNT)

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

District purchased lights and receives instant discount

Energy Trust received paperwork from distributor and sends it to ODOE ODOE reviews
project and
provides eligibility
and SB 1149
maximum
reimbursement

District installs project within 90 days of sales date

District confirms install and submits any additional project costs to ODOE (labor, PM, design, etc)

Energy Trust discount from distributor must be passed along to District ODOE sends email with approved SB 1149 reimbursement amount

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

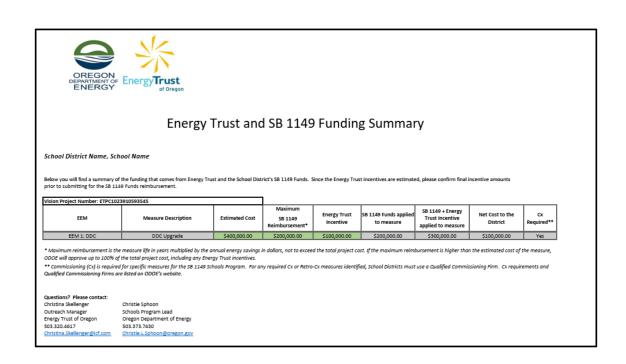
Measure Description	Estimated Cost	SB 1149 Maximum Reimbursement	Energy Trust Incentive	SB 1149 Funds	SB 1149 Funds + Energy Trust Incentive	Net Cost to the District
Lighting Upgrade	\$75,000.00	\$150,000.00	\$25,000.00	\$50,000.00	\$75,000.00	\$0.00





SB 1149 PROGRAM COMMUNICATIONS

 Updated information to provide both Energy Trust incentives and SB 1149 funds for measures









Notice of Measure Eligibility

ODDE 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 **	Eligibl e
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 Summar

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 (Cu) 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 ODDE's webpage.

Now that your measures are entered into the Schools Database, check out the <u>Audit Measure Implementation flowchart</u> for next steps within the S8 1149 Schools Program to install these measures and submit for S8 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

SB 1149 PROGRAM COMMUNICATIONS

 Once all final costs have been reviewed by ODOE and entered into Schools Database, 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 Sphoon

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



Stay connected!





SB 1149 SCHOOLS PROGRAM REPORTING

Annual reporting to ODOE

Utility Bill for Eligibility

Monthly Energy Use & Costs

SB 1149 Account Balance

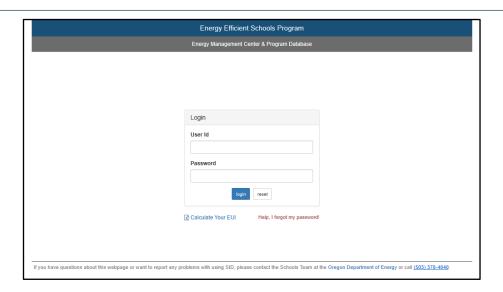
Reporting as needed to ODOE

Completed
Measures with
Final Costs

School Facility
Changes or
Renovations Data







Schools Database:

School Facilities

Energy Usage data

Audit data

Measure data

New Fleet Audit & Electric Vehicle sections

New Reports





Energy Efficient Schools Program

MAIN MENU

change password | log out

Facility Energy Management

Enter annual or monthly energy billing data here. See graphs and pull reports on your energy consumption and payments. Also enter relevant facility information like total square feet, annual hours of operation, etc.

Transportation Energy Data

Enter monthly transportation energy data and view annual totals.

Edit School District Contact Information

Update information about the contact for your School District.

Energy Efficiency Audits

Enter or view energy efficiency audit results of facilities.

Fleet Audits

Enter or view fleet audit information.

Electric Vehicle and Charging Infrastructure Measures Entry

Enter or view Electric Vehicle and Charging Infrastructure Measures.

Actual Implementation Costs

Enter actual implementation costs of energy efficiency projects.

School District Program Status

View program status for school district facilities.

Commissioning

Enter or view the status and costs of commissioning specific energy efficiency projects.

School District's SB1149 Implementation Plan

Import and export audit measure implementation plan data.

Reports

Generate multiple status and planning reports.

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 Energy Trust, 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).





2022 UPCOMING EVENTS

Event	Date/Time	Link
School Bus Electrification: Funding Webinar (Recording available in Resources on webpage link)	March 8	https://www.oregon.gov/energy/energy- oregon/Pages/Fleets.aspx
School Bus Electrification: Technical Webinar (Recording available in Resources on webpage link)	March 15	http://www.oregon.gov/energy/energy- oregon/Pages/Fleets.aspx
Public Purpose Charge (SB 1149) Schools Program - 2022 Outreach webinar (repeat of March webinar)	April 5, 9am – 10am	https://www.oregon.gov/energy/energy- oregon/Pages/SB1149-Program-Guidelines.aspx
Bonds, Ballots and Buildings Conference *ODOE not attending, but materials available at ETO vendor booth	April 8, 7:30 – 3:30pm	https://www.osba.org/Calendar/Events/Bonds Ballots And Buildings-2022.aspx
OSFMA Conference *ODOE and ETO attending Trade Show with booth(s)	April 14, 9am – 4pm	https://www.osfma.org/Annual-Conference
OASBO Conference *ODOE and ETO attending Trade Show with booth(s)	July 27 – 29	https://oasbo.com/page/events





CONTACT US



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Oregon Department of Energy

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