WORKING TOGETHER FOR SCHOOLS

Christie Sphoon
Oregon Department of Energy

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Energy Trust of Oregon, Existing Buildings program

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Energy Trust of Oregon, Existing Buildings program
INVESTOR-OWNED UTILITY TERRITORY MAP
### SB 1149 Schools Program vs. Energy Trust of Oregon (Existing Buildings)

<table>
<thead>
<tr>
<th>SB 1149 Schools Program</th>
<th>Energy Trust of Oregon (Existing Buildings)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Power and PGE territories</td>
<td>Pacific Power, PGE, NW Natural, Cascade, Avista territories</td>
</tr>
<tr>
<td>SB 1149 funding distributed monthly based on eligible facilities and student counts</td>
<td></td>
</tr>
</tbody>
</table>
| 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 Schools Program

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

SB 1149 funding considered reimbursement after project completion and final cost data submitted to ODOE

### Energy Trust of Oregon (Existing Buildings)

Can fund energy projects for any facility type

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
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

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 ODOE**
School 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:

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

* 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
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.
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**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Base Incentive</th>
<th>Bonus Incentive</th>
<th>Total Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steam Traps</td>
<td>$100/trap</td>
<td>$200/trap</td>
<td>$300/trap</td>
</tr>
<tr>
<td>Gas Steam Cooker</td>
<td>$2000/cooker</td>
<td>$1000/cooker</td>
<td>$3000/cooker</td>
</tr>
<tr>
<td>Pipe Insulation (per linear foot)</td>
<td>$4-12/LF</td>
<td>$9-3/LF</td>
<td>$15/LF</td>
</tr>
<tr>
<td>Commercial Condensing Tank Water Heater</td>
<td>$3/kbtu/hr</td>
<td>$0.35/kbtu/hr</td>
<td>$3.35/kbtu/hr</td>
</tr>
<tr>
<td>Commercial Condensing HVAC Boiler</td>
<td>$3.25/kbtu/hr</td>
<td>$3.75/kbtu/hr</td>
<td>$7/kbtu/hr</td>
</tr>
</tbody>
</table>
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
- Energy Trust sends check in mail
- ODOE sends email with approved SB 1149 reimbursement amount

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

<table>
<thead>
<tr>
<th>Bonus</th>
<th>Base Rate</th>
<th>Bonus Rate</th>
<th>Total Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Buildings Custom Rate</td>
<td>$3/therm</td>
<td>$1/therm</td>
<td>$4/therm</td>
</tr>
<tr>
<td>Multifamily Custom Rate</td>
<td>$2/therm</td>
<td>$1/therm</td>
<td>$3/therm</td>
</tr>
</tbody>
</table>

* 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.

<table>
<thead>
<tr>
<th>Bonus</th>
<th>Base Project Cost Cap</th>
<th>Bonus Project Cost Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCx</td>
<td>60%-75%</td>
<td>100%</td>
</tr>
</tbody>
</table>

* 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.
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**
- **Energy Trust sends check in mail**
  ODOE sends email with approved SB 1149 reimbursement amount

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
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

<table>
<thead>
<tr>
<th>Measure Description</th>
<th>Estimated Cost</th>
<th>SB 1149 Maximum Reimbursement</th>
<th>Energy Trust Incentive</th>
<th>SB 1149 Funds</th>
<th>SB 1149 Funds + Energy Trust Incentive</th>
<th>Net Cost to the District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Controls Upgrade</td>
<td>$250,000.00</td>
<td>$150,000.00</td>
<td>$50,000.00</td>
<td>$150,000.00</td>
<td>$200,000.00</td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

### Example: Project Cost is less than SB 1149 max reimbursement

<table>
<thead>
<tr>
<th>Measure Description</th>
<th>Estimated Cost</th>
<th>SB 1149 Maximum Reimbursement</th>
<th>Energy Trust Incentive</th>
<th>SB 1149 Funds</th>
<th>SB 1149 Funds + Energy Trust Incentive</th>
<th>Net Cost to the District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting Upgrade</td>
<td>$75,000.00</td>
<td>$150,000.00</td>
<td>$25,000.00</td>
<td>$50,000.00</td>
<td>$75,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Updated information to provide both Energy Trust incentives and SB 1149 funds for measures

Energy Trust and SB 1149 Funding Summary

<table>
<thead>
<tr>
<th>School District Name, School Name</th>
<th>Measure Description</th>
<th>Estimated Cost</th>
<th>Maximum SB 1149 Reimbursement*</th>
<th>Energy Trust Incentive</th>
<th>SB 1149 Funds applied to measure</th>
<th>Net Cost to the District</th>
<th>Total Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Trust - Lighting Upgrades</td>
<td>$4,737</td>
<td>0.9 yr</td>
<td>18 yrs</td>
<td>$2,082</td>
<td>$12,455.82</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>School Lighting - Parking lot lighting upgrades</td>
<td>$4,989</td>
<td>6.2 yr</td>
<td>18 yrs</td>
<td>$2,082</td>
<td>$11,442.68</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

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

** Commissioning (Co) is required for specific measures and identified in the SB 1149 Schools Program. For any required Co or RetCo measures identified, School Districts must use a Qualified Commissioning Firm. Co requirements and Qualified Commissioning Firms are listed on DCCD’s website.

Notice of Measure Eligibility

Schools may apply for the Notice of Measure Eligibility for Energy Trust and the School District’s SB 1149 Funds. Once the Energy Trust incentives are estimated, please confirm final incentive amounts prior to submitting the SB 1149 Funds reimbursement.

Funding Summary

School Measure Class Measure Description Estimated Cost Minimum SB 1149 Reimbursement* Energy Trust Incentive SB 1149 Funds Net Cost to the District
<table>
<thead>
<tr>
<th>School</th>
<th>Measure Class</th>
<th>Measure Description</th>
<th>Estimated Cost</th>
<th>Maximum SB 1149 Reimbursement*</th>
<th>Energy Trust Incentive</th>
<th>SB 1149 Funds</th>
<th>Net Cost to the District</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>Lighting</td>
<td>Exterior lighting upgrade to LED</td>
<td>$4,737</td>
<td>112,455.82</td>
<td>$2,082</td>
<td>$12,455.82</td>
<td>0.00</td>
</tr>
<tr>
<td>School</td>
<td>Lighting</td>
<td>Parking lot lighting upgrade to LED</td>
<td>$4,989</td>
<td>112,442.68</td>
<td>$2,082</td>
<td>$11,442.68</td>
<td>0.00</td>
</tr>
</tbody>
</table>

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

Now that your measures are entered into the Schools Database, check out the Audit Measure Implementation Roadmap for next steps within the SB 1149 Schools Program to install these measures and submit for SB 1149 Reimbursement! Please work with Christina Stellenger, with Energy Trust on next steps for the Energy Trust Incentives.

Questions? Please contact:

Christine Stellenger  
Schools Program Lead  
Outreach Manager  
Energy Trust of Oregon  
503.373.7360  
Christine.Stellenger@oregon.gov

For any questions, please contact Christine Stellenger, with Energy Trust on next steps for the Energy Trust Incentives.
• Once all final costs have been reviewed by ODOE and entered into Schools Database, email approving SB 1149 funds is sent

<table>
<thead>
<tr>
<th>School</th>
<th>Measure Description</th>
<th>Maximum SB 1149 Reimbursement</th>
<th>Final Cost</th>
<th>Energy Trust Incentive</th>
<th>SB 1149 Funds applied to measure</th>
<th>Net Cost to the District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle School</td>
<td>Install 2 [199 kbtu] high efficient water heaters</td>
<td>$13,485.00</td>
<td>$14,890.00</td>
<td>$1,190.00</td>
<td>$13,485.00</td>
<td>$215.00</td>
</tr>
<tr>
<td>Elementary School</td>
<td>Interior Lighting Upgrade to LEDs</td>
<td>$70,250.00</td>
<td>$52,000.00</td>
<td>$15,000.00</td>
<td>$37,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td></td>
<td><strong>$66,890.00</strong></td>
<td><strong>$16,190.00</strong></td>
<td><strong>$50,485.00</strong></td>
<td><strong>$50,485.00</strong></td>
<td><strong>$215.00</strong></td>
</tr>
</tbody>
</table>

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

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
SB 1149 SCHOOLS PROGRAM

Schools Database:  
- School Facilities
- Energy Usage data
- Audit data
- Measure data
- New Fleet Audit & Electric Vehicle sections
- New 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 gcnnotice@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

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

Future webinars and conferences coming soon!
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