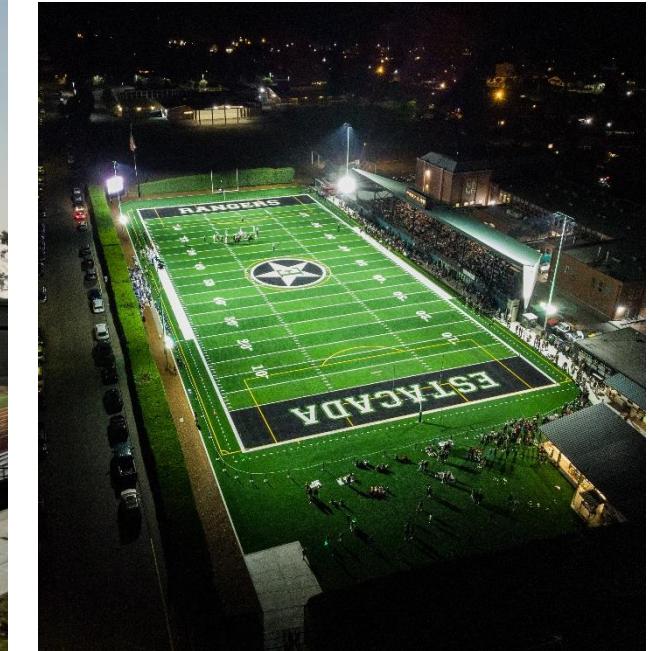


Public Purpose Charge (SB 1149) Schools Program 2025 Outreach

**Oregon Department
of Energy & Energy
Trust of Oregon**



Football Field lighting projects at West Linn HS and Estacada HS

WORKING TOGETHER FOR SCHOOLS

Christie Sphoon
Oregon Department of Energy

Tracy Richardson
Oregon Department of Energy

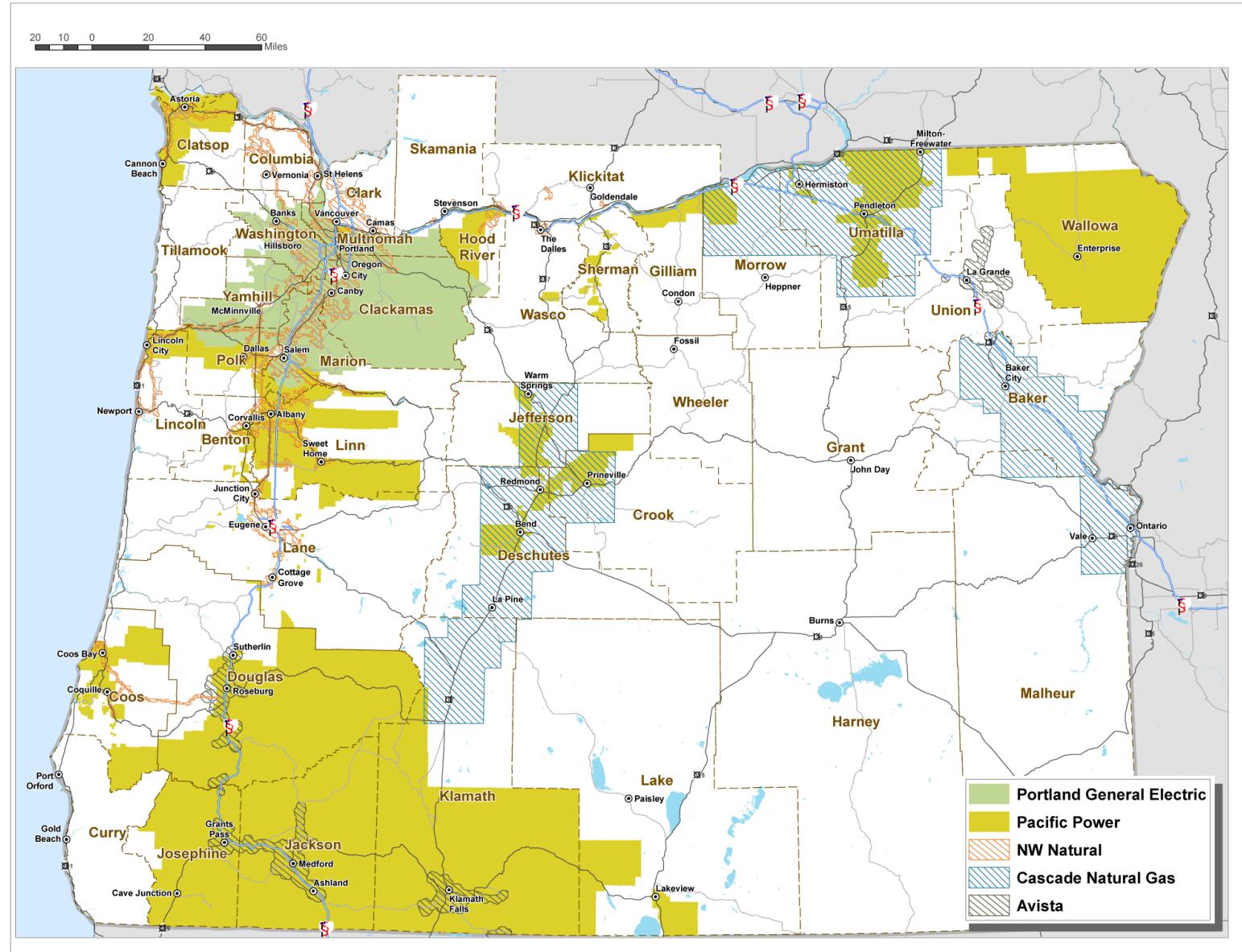
Christina Skellenger
Energy Trust of Oregon, Existing Buildings program

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	Energy Trust of Oregon (Existing Buildings)
<ul style="list-style-type: none">• Districts in Pacific Power and PGE territories• PPC or SB 1149 funds sent directly to Districts each month through <u>January 01, 2036</u>• Districts annual eligible percentage of funds based on educational facilities within territories and students counts• Eligible expenditures:<ul style="list-style-type: none">Energy audits or Fleet AuditsEnergy efficiency measuresZero emission vehicles (including buses)Electric vehicle chargers• Energy measures need to be analyzed and have energy savings to be eligible	<ul style="list-style-type: none">• Districts in Pacific Power, PGE, NW Natural, Cascade, Avista territories• All facility types are eligible• Incentive types:<ul style="list-style-type: none">Standard IncentivesLighting IncentivesCustom Incentives• Incentive types details below

KEY ELEMENTS

ODOE SB 1149 Schools Program	Energy Trust of Oregon (Existing Buildings)
<ul style="list-style-type: none">SB 1149 max reimbursement is based on measure life x annual energy savingsFunds considered <u>reimbursement</u> after project completion and final cost data submitted to ODOEFunding 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	<ul style="list-style-type: none">Funding based on cost effectiveness, energy savingsIncentives paid upon completion of project and submittal of final invoices
<p><i>* While not required, ODOE recommends reimbursement funds transfer to bond, maintenance, or facility fund to continue additional projects</i></p>	
<ul style="list-style-type: none">Annual reporting includes electric bills for eligibility, utility data for eligible facilities and reporting of account balances	

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
Battery Electric Light Duty Maintenance Van or Truck	Up to \$30,000
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.

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

ENERGY TRUST OF OREGON 2025 CHANGES

Project	Incentive
Steam traps	\$400 for repair, \$500 for replacement (may be able to pay for entire project!)
Roof insulation	\$2.85 per square foot
Pipe insulation	\$25 per linear foot (may be able to pay for entire project!)
Wall insulation	\$1.30 per square foot
Boiler	\$6.50 per kBtu
Water heater	\$3.50 per kBtu
Controls & HVAC upgrades	Can cover up to 90% of project cost
Retro-commissioning	Can cover up to 90% of project cost
Lighting	2025 ban on sale/distribution of fluorescent lighting is in effect
Pool covers	Please see me for details.
Kitchen equipment	Incentives for hood vents, dishwashers, ovens, food conveyers, etc.
Greenhouses	Please see me for details.

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

LIGHTING – Energy Trust of Oregon

BIG changes coming in 2025!

The time is now to complete
lighting upgrades!



LIGHTING – Energy Trust of Oregon

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 – Energy Trust of Oregon

- Program paused accepting new project – Aug. 2024
- Program started accepting new project – Jan. 16, 2025
- 90% of the Standard Program offer has already been allocated
- June 30, 2025 – Program incentives will be significantly impacted



LIGHTING – Energy Trust of Oregon

- Recommendations:

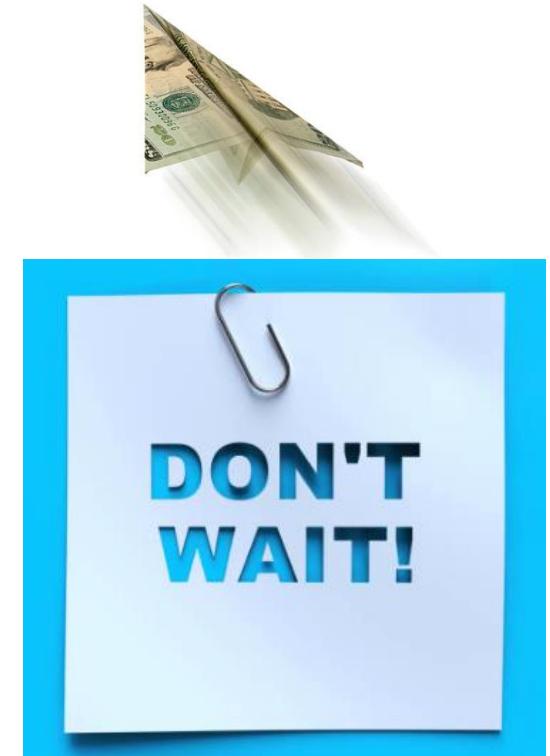
- Evaluate facility lighting NOW
- Submit projects for approval ASAP
- Partner with Energy Trust & SB 1149 Program to maximize funding
- Approve projects before June 30, 2025, to lock in incentives before program changes

- SB 1149 Program Lighting will continue through Jan. 1, 2036
- Continued support for SB-1149 funding after Energy Trust's 2025 Budget has been exhausted



LIGHTING – Energy Trust of Oregon

- Business lighting program offerings – 1 of 2
 - Standard Program offer (downstream)
 - Budget is limited in 2025
 - Pre-approval is required
 - Lighting Tool Application – pre and post conditions required
 - Installation must be completed and invoices submitted by Dec. 1, 2025
 - On average offers higher incentives vs Instant Program (Midstream)
 - Best suited for large projects and remodels



LIGHTING – Energy Trust of Oregon

- Business lighting program offerings – 2 of 2
 - Instant Incentives (Midstream)
 - Offered through participating distributors
 - Incentives are offered at the point of purchase
 - Installations must be complete within 90 days of purchase
 - Best suited for small and maintenance projects



LIGHTING

- 2025 incentives post June 30 - will be released later this year
- OSFMA Annual Conference presentation – attend for additional info / updates
- **WE ARE HERE TO HELP!**



PROCESS OVERVIEW: STANDARD INCENTIVES

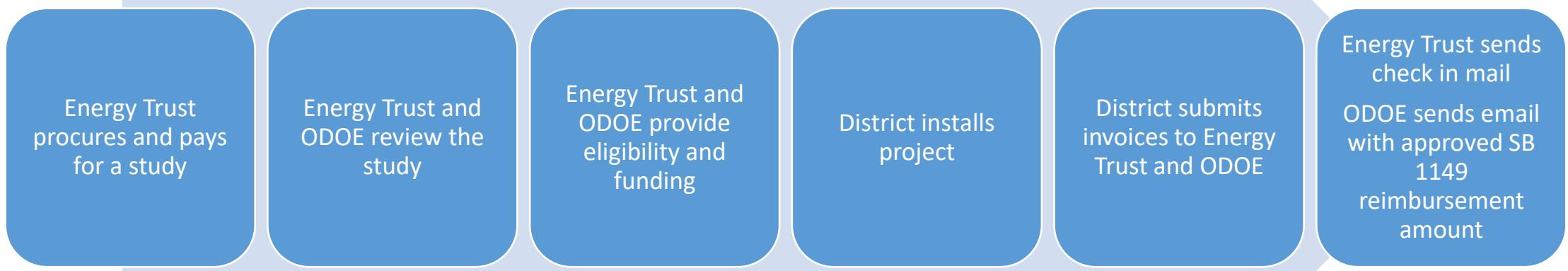
Equipment eligible for standard incentives do not require pre-approval



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

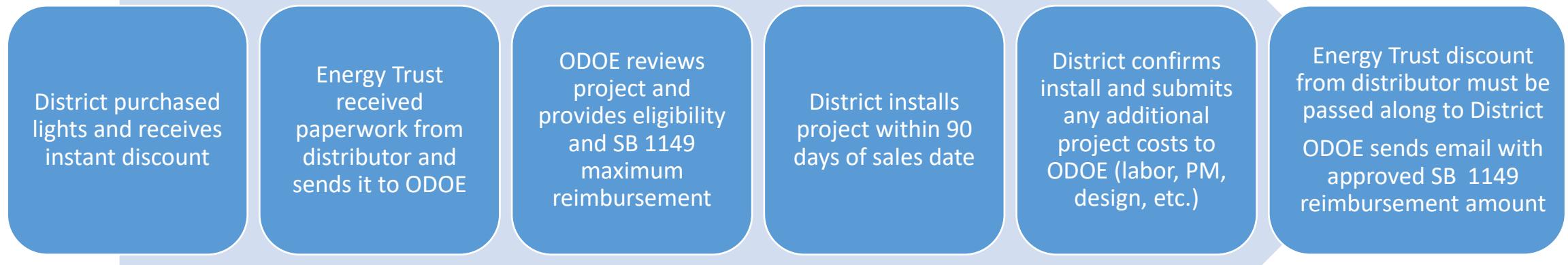
Lighting projects **do** require pre-approval



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.

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:
Christie Skellenger, Outreach Manager, Energy Trust of Oregon, 503.320.4617, Christie.Skellenger@icf.com



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 website.

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

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 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 FUNDS AND TRACKING

- ODOE approves SB 1149 funds for reimbursement after projects have been completed
- SDs can reimburse/transfer funds out of SB 1149 account, if available. If not, then SDs will need to track until the approved cost has been fully reimbursed

Example of how to track reimbursements along with revenues

				Revenues	Interest	Expenditures	Other Fees	Other Fees by ESD			
Totals from ESD Info				\$892,022.10	\$15,015.62	\$688,294.66	\$145,691.61	Custod. Fees	Staff Fees	Other	OOE Fees
<i>Not reflected on Implementation Plan</i>											
District	Year	Month	Balance Forward	Revenue	Interest	Expenditure Reimbursement	End Balance				
	2022	2	\$276,040.69	\$9,855.14			\$285,895.83				
	2022	3	\$285,895.83	\$8,959.55			\$294,855.38				
	2022	4	\$294,855.38	\$8,183.83			\$303,039.21				
	2022	5	\$303,039.21	\$7,935.55			\$310,974.76				
	2022	6	\$310,974.76	\$7,662.73		\$950,000.00		-\$631,362.51			
	2022	7	-\$631,362.51	\$8,241.92				-\$623,120.59			
	2022	8	-\$623,120.59	\$9,627.09				-\$613,493.50			
	2022	9	-\$613,493.50	\$8,868.39				-\$604,625.11			
	2022	10	-\$604,625.11	\$7,675.38				-\$596,949.73			
	2022	11	-\$596,949.73	\$9,131.63				-\$587,818.10			
	2022	12	-\$587,818.10	\$11,095.61				-\$576,722.49			
	2023	1	-\$576,722.49					-\$576,722.49			
	2023	2	-\$576,722.49					-\$576,722.49			
	2023	3	-\$576,722.49					-\$576,722.49			
	2023	4	-\$576,722.49					-\$576,722.49			
	2023	5	-\$576,722.49					-\$576,722.49			
	2023	6	-\$576,722.49					-\$576,722.49			
	2023	7	-\$576,722.49					-\$576,722.49			
	2023	8	-\$576,722.49					-\$576,722.49			
	2023	9	-\$576,722.49					-\$576,722.49			
	2023	10	-\$576,722.49					-\$576,722.49			
	2023	11	-\$576,722.49					-\$576,722.49			
	2023	12	-\$576,722.49					-\$576,722.49			

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 gcnote@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).

2025 UPCOMING EVENTS

Event	Date/Time	Link
Public Purpose Charge (SB 1149) Schools Program and Energy Trust Updates - 2025 webinar (repeat of webinar)	February 5, 10am – 11am	
Oregon School Facility Management Association (OSFMA) Conference *ODOE and ETO attending Trade Show with booth(s)	April 16 - 17	https://www.osfma.org/
OASBO Conference *ODOE and ETO attending Trade Show with booth(s)	July 23 - 25	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.l.sphoon@energy.oregon.gov
503.689.0500 **DIRECT**
Oregon.gov/energy



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



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



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