

Oregon Department of **ENERGY**

Public Purpose Charge (SB 1149) Schools Program and Energy Trust Program

Annual 2026 Outreach



Working Together for Schools

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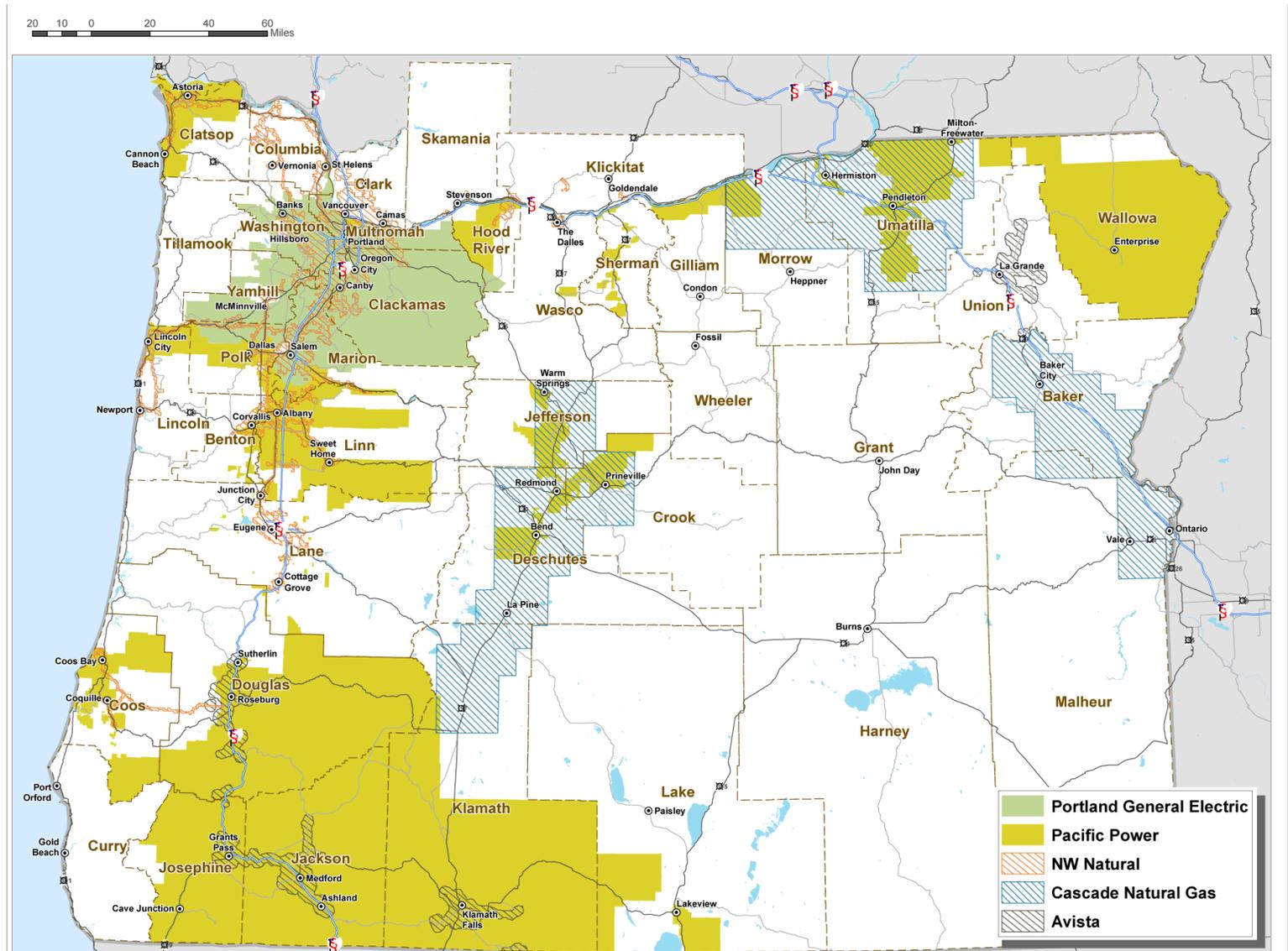
Christina Skellenger
Energy Trust of Oregon, Existing Buildings program

Colin Podelnyk
Energy Trust of Oregon, Existing Buildings program

Jennifer Blake
Energy Trust of Oregon, Existing Buildings program



Investor-Owned Utility Territory Map



Key Elements

| ODOE SB 1149 Schools Program | Energy Trust Existing Buildings Program |
|--|--|
| Districts with educational facilities in Pacific Power and PGE territories | Districts in Pacific Power, PGE, Avista, Cascade, NW Natural territories |
| PPC or SB 1149 funds send directly to districts each month until January 01, 2036 | All facility types are eligible |
| Districts annual percentage based on educational facilities and student counts in territories | - |
| Eligible expenditures include: <ul style="list-style-type: none"> Admin expenses Fleet and Energy Audit costs Fleet and Energy Measure costs Commissioning costs | Incentive types: <ul style="list-style-type: none"> Standard incentives Lighting incentives Custom incentives |
| Energy measures need to be analyzed and have energy savings to be eligible | Incentive type details below |

Key Elements (continued)

| ODOE SB 1149 Schools Program | Energy Trust Existing Buildings Program |
|--|--|
| SB 1149 max reimbursement is based on measure life x annual energy savings | Funding based on cost effectiveness, energy savings |
| Funds considered <i>reimbursement</i> after project completion and final cost data submitted to ODOE | Incentives paid upon completion of project and submittal of final invoices |
| Funding can be approved based on estimated future SB 1149 funds through end of program, until Districts are “Spent out of SB 1149 funds” | - |
| Reimbursements are tracked by districts | - |
| Annual reporting includes electric bills for eligibility, utility data for eligible facilities and reporting of account balances | - |

SB 1149 Administrative Expenses

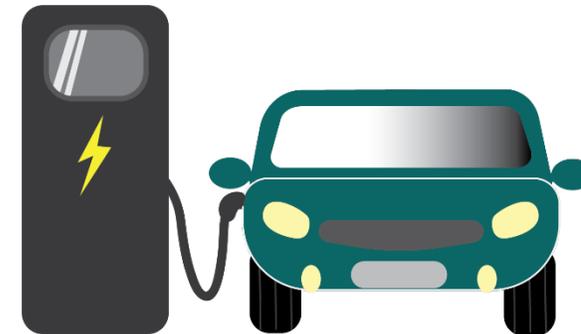
- School Districts can submit a SB 1149 Administrative Expenses Request form for set timeframes to request SB 1149 funds for administrative tasks such as:
 - Collect and submit copies of electric utility bills for annual eligibility reporting
 - Collect, analyze and input all energy usage for eligible school facilities into the Schools Interactive Database or Energy Star Portfolio Manager for annual energy usage reporting
 - Compile documentation and submit requests for reimbursement of expenses
 - Manage accounting details by recording and tracking all Public Purpose Charge (SB 1149) revenues and expenditures
- Reach out to ODOE for the SB 1149 Administrative Expenses Request form

SB 1149 Schools Program Trainings

- Eligible trainings, such as Building Operator Certification (BOC), are related to saving energy and maintaining energy savings in schools
- School Districts can submit a Training Application form with details on requested staff and training
- ODOE will review information to determine eligibility and eligible portion of SB 1149 funds for reimbursement after completion of training
- Reach out to ODOE for the Training Application form to review staff minimum requirements specified in form

SB 1149 Fleet Audits, Zero Emission Vehicles & Chargers

| 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.*

Energy Trust of Oregon 2026 Overview

| 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 | Please see Energy Trust contact for more details |
| Kitchen equipment | Incentives for hood vents, dishwashers, ovens, food conveyers, etc. |
| Pool covers & greenhouses | Please see Energy Trust contact for more details |

Standard Lighting–Energy Trust of Oregon

- Standard Program Offer (downstream)
 - Budget is limited in 2026
 - Pre-approval is required
 - Lighting Tool Application – pre and post conditions required
 - Best suited for large projects, remodels and projects with lighting controls



Midstream Lighting-Energy Trust of Oregon

Business Lighting Offerings (2 of 2)

- Instant Incentives (midstream)
 - Offered through participating distributors
 - Incentives are offered at the point of purchase
 - Installations must be complete with 90 days of purchase
 - Best suited for small and maintenance projects or projects without lighting controls



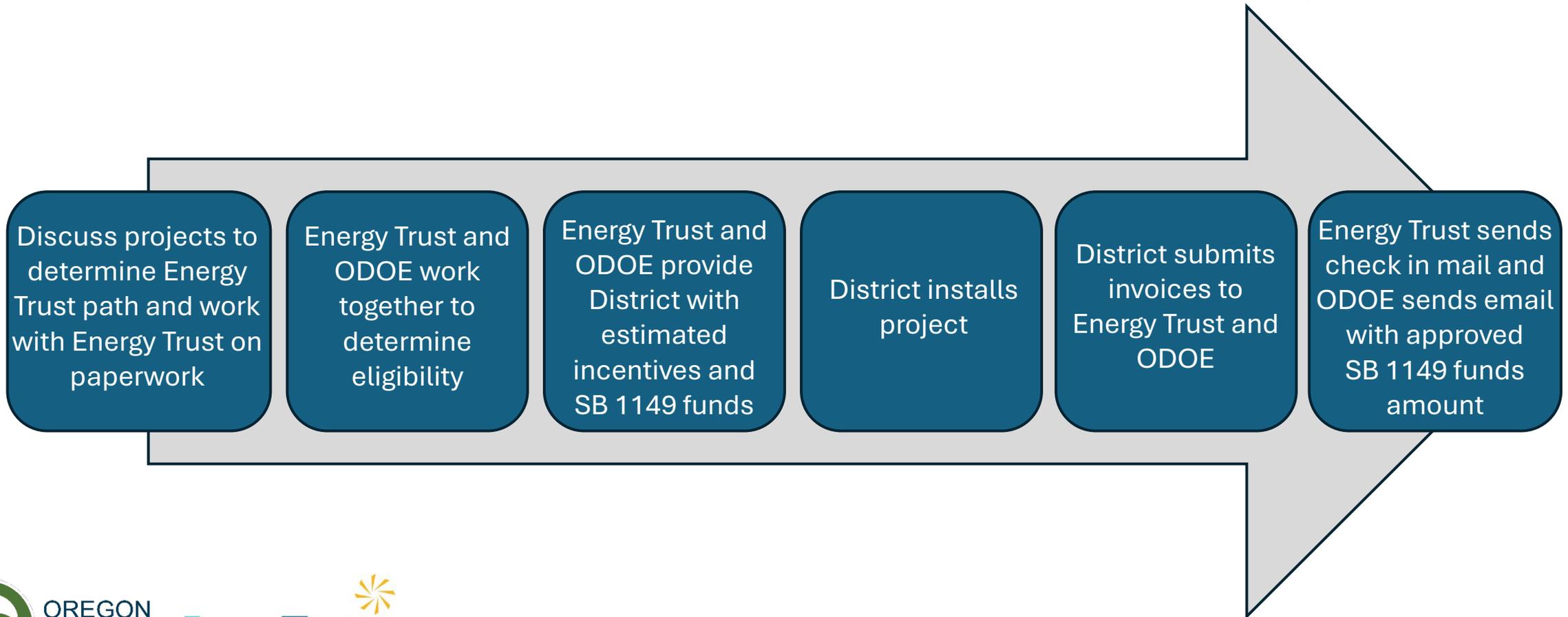
BPS and SB 1149 Reporting

- Building Performance Standards (BPS) and SB 1149 Schools Program both have energy usage reporting but there are differences between the programs
 - SB 1149 Schools Program is monthly data submitted for each eligible School or campus for each Fiscal Year
- SB 1149 Schools Program will allow energy usage reporting through Schools Interactive Database or Energy Star Portfolio Manager
- Check out the BPS and K-12 Schools webinar for details on building tiers, energy reporting, qualified staff and more

[Building Performance Standard and K-12 Schools Webinar Recording](#)

Process Overview

Reach out to Christie with ODOE or Christina, Colin or Jennifer with Energy Trust



Examples 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 Communication – Eligibility

Before Projects Move Forward

- 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 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 Communication – Confirmation

After Projects are Installed

- Confirmation Needed for ODOE to process SB 1149 funds

Subject Confirmation Needed: SD, School Lighting completed project and SB 1149 funds No Label ▾

SD Contact, |

We will be reviewing the energy savings and final costs for the SD project below, but we need the School District to confirm a few things before we can process any SB 1149 funds.

Can you please confirm the items below for the project in the table below:

- Please confirm if the final cost in the table below is correct. If not, then please send us the final cost and send backup for any additional costs.
- Please confirm if the District received any Grant funds such as ESSER, SIA, etc. for the project below. If so, please confirm the type of Grant and the Grant fund amount for the project.
- Please confirm if the District would like to claim SB 1149 funds for the project below.

| School | Measure Description | Final Cost | Energy Trust Incentive |
|--------|-----------------------------------|--------------|------------------------|
| School | Interior Lighting Upgrade to LEDs | \$100,000.00 | \$20,000.00 |

SB 1149 Communication - Approval

After Projects are Installed and SB 1149 Process Completed

- ODOE sends email with approved SB 1149 funds for reimbursement

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.



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 Stay connected!

SB 1149 Funds and Tracking

SDs can reimburse/transfer funds out of SB 1149 account when they receive ODOE email confirming reimbursement amount. If funds are not all available in account, then SDs will need to track until the approved cost has been fully reimbursed

Example of how to track reimbursements along with revenues

| | | | | | | | | Other Fees by ESD | | | |
|----------------------|------|-------|-----------------|-------------|----------|---------------------------|---------------|-------------------|-------------|--------------|--------------|
| | | | | | | | | Custod. Fees | Staff Fees | Other | OOE Fees |
| Totals from ESD Info | | | | | | | | \$892,022.10 | \$15,015.62 | \$688,294.66 | \$145,691.61 |
| 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 | | | | |



Contact Us to Get Started



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