Public Purpose Charge (SB 1149) Schools Program
School District Process to Implement Energy Measures

Scoping & Feasibility Phase

- Review Implementation Plan for eligibility and maximum reimbursement of all measures that are part of your project.*

- Compare project to measure(s) in Implementation Plan and description(s) and scope(s) in audit reports.

- Q: Does the project match the measure?
  - Yes
  - No: Contact ODOE

Plan, Bid, & Procurement Phase

- Proceed with traditional planning and bid processes. *Specifications & scope should be consistent with Implementation Plan & Audit Reports.*

- Compare bids to max reimbursement. *Costs above max are not eligible for reimbursement.*

- Complete contract and procurement processes. *Contractors should maintain itemized invoices by school and measure.*

- Q: Have you completed all tasks and ready to start construction?
  - Yes: Move on to next phase
  - No: Contact ODOE

Construction Phase

- Begin construction of measure(s). Maintain invoices and receipts throughout.

- Upon completion, submit documentation of measure(s) and costs to ODOE.

- ODOE reviews documentation and approves as-is or will request more info. *ODOE may conduct a site visit during the process.*

- Data entry completed for reimbursement. Export revised Implementation Plan reflecting completion.

Helpful Links:

- ODOE Schools Programs
- Audit Process Flowchart
- SB 1149 Funds Reimbursement Checklist
- Public Purpose Charge Guidelines
- Qualified Audit Firms
- Qualified Commissioning Firms

* Contact Energy Trust of Oregon Existing Buildings staff to apply for ETO incentives.*