Public Purpose Charge = 3% on Portland General Electric and Pacific Power customers’ utility bills

- School Districts receive the first 10%
- Energy Trust of Oregon receives just under 74%
- Oregon Housing and Community Services receives just over 16%
# of Eligible School Districts: 110

# of Eligible Schools: ~ 825

Average Annual SB 1149 Funds: $8 million

SB 1149 Funds Revenues 2002 to June 30, 2017: Just over $137 million

SB 1149 Expenditures 2002 to June 30, 2017: Just over $120 million
Eligible Facilities:
  • K – 12 Educational Facilities
    • Owned by School District
    • Within PGE or Pacific Power electric territory

Non-Eligible Facilities:
  • New K – 12 Educational Facilities (within first 2 years)
  • Administrative Facilities
  • Facility/Maintenance Buildings
PUBLIC PURPOSE CHARGE (SB 1149)  
SCHOOLS PROGRAM

Audit

Audit results entered into SID by audit firm

School District implements audit measure(s)

School District requests reimbursement from ODOE

School District reimbursed with SB 1149 funds
Prequalified Energy Audit Firms and Audit Report and Audit Requirements:

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

- Audit Firm submits qualifications to Energy Audits for School Buildings Request for Qualifications
- If Audit Firm is approved, they sign a Prequalified List Agreement to become a Prequalified Audit Firm
- School develops Energy Audit Scope of Work and selects Prequalified Audit Firm
- Audit Firm submits Scope of Work Approval Form for ODOE review and approval
- Audit Firm submits signed Contract with school to ODOE, per approved Scope of Work Approval Form

CONDUCT ENERGY AUDIT

- Audit Firm reviews Energy Audit Requirements and Audit Report Template and Requirements.
- Audit Firm conducts preliminary analysis and schedules site visit
- Audit Firm conducts site visit(s) and completes all activities listed in the Energy Audit Requirements necessary to complete the Energy Audit Report

CREATE ENERGY AUDIT REPORT

- Audit Firm reviews Audit Report Template and Requirements
- Audit Firm completes analysis and writes Energy Audit Report. Report follows the Audit Report Template and Requirements
- The Audit Report analysis includes all Energy Efficiency Measures (EEMs) with a simple payback of less than 50 years, unless approved for Targeted Measures only

SUBMIT ENERGY AUDIT REPORT

- Audit Firm initiates Audit in Schools Interactive Database (SID) and uploads draft Report
- ODOE reviews the report and provides review comments. Audit firm works with ODOE to ensure report meets all requirements
- ODOE approves final draft, then Audit Firm uploads final document(s) and enters EEMs into SID
- Audit Firm submits Final Audit Report to School District

IMPLEMENT EEMs

- School District reviews report and selects measures from Implementation Plan
- School District completes measures and enters final costs into SID
- School District submits reimbursement request for eligible expenditures to ODOE
- ODOE reviews and approves eligible expenditures in SID
PUBLIC PURPOSE CHARGE (SB 1149) SCHOOLS PROGRAM

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.*

Plan, Bld, & Procurement Phase
- Proceed with traditional planning and bid processes. Specifications & scope should be consistent with Implementation Plan & Audit Reports.
- Compare project to measure(s) in Implementation Plan and description(s) and scope(s) in audit reports.

Construction Phase
- Begin construction of measure(s). Maintain invoices and receipts throughout.
- Upon completion, submit documentation of measure(s) and costs to ODOE.

Q: Does the project measure(s) in Implementation Plan match the measure? Yes: Choose qualified Commissioning Firm and move on to next phase. No: Contact ODOE

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

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
- Qualified Audit Firms
- Qualified Commissioning Firms
- Public Purpose Charge Guidelines

* Contact Energy Trust of Oregon Existing Buildings staff to apply for ETO incentives.
PUBLIC PURPOSE CHARGE (SB 1149) 
SCHOOLS PROGRAM

Public Purpose Charge (SB 1149) Schools Program 
SB 1149 Funds Reimbursement Checklist

School Districts may use this checklist to follow the process for requesting SB 1149 funds for energy audits, eligible energy measures, commissioning services, and administrative expenses.

Energy Audit Costs
☐ Qualified Audit Firm submits the Audit Report to ODOE for review, and enters audit report data including audit cost in the Schools Database
☐ ODOE will send “Notice of Audit Review” email to School District and Qualified Audit Firm once Audit Report review process has been completed and approved
☐ School District is eligible to reimburse the audit cost from the district’s SB 1149 funds upon receipt of the “Notice of Audit Review” email

Project Costs
☐ School District sends an email to ODOE that includes:
  ☐ School name
  ☐ Completed energy measure with Audit Measure # (on District’s Implementation Plan)
  ☐ Date of completion (month/year)
  ☐ Total final cost
  ☐ Utility incentive amount or other incentive amounts (if received, include a copy of incentive payment or receipt reflecting amount)
  ☐ Scanned copies of commissioning cost documentation
  ☐ Examples of documentation: invoice, receipt, District accounting reports, schedule of values, contractor final cost report, etc.
☐ School District to complete data entry in Schools Database
Data to be entered: Total final cost, month/year of completion, SB 1149 funds requested, and any other incentives received.
* School District may request by email to have ODOE complete the data entry step above
☐ ODOE will review provided data, request any follow-up data needed and approve SB 1149 funds within the Schools Database
☐ ODOE will send an email to the School District confirming approved SB 1149 funds eligible for the School District to reimburse

Commissioning Costs
☐ School District sends an email to ODOE that includes:
  ☐ School name
  ☐ Energy measure that had commissioning services, including the Audit Measure # (on District’s Implementation Plan)
  ☐ Date commission services was completed (month/year)
  ☐ Total commissioning cost
  ☐ Scanned copies of commissioning cost documentation
  ☐ Examples of documentation: invoice, receipt, District accounting report, etc.
  ☐ Commissioning Report
☐ ODOE will review provided data and request any necessary follow-up data
☐ ODOE will complete the data entry of completed commissioning and the cost in the Schools Database
☐ ODOE will send an email to the School District approving SB 1149 funds for reimbursement

Administrative Expenses
☐ School District submits the Administrative Expenses Form to ODOE for review prior to work
☐ ODOE will review Administrative Expenses Form, request any necessary follow-up data, and approve administrative tasks to move forward for the specified timeframe
☐ School District sends an email at the end of specified timeframe to ODOE with an invoice for the amount of administrative tasks performed
☐ ODOE will review invoice, request any follow-up data needed and complete the data entry of administrative expenses within the Schools Database
☐ ODOE will send an email to the School District approving SB 1149 funds for reimbursement
Reporting by School Districts:

- Facility Data for Eligibility
- Monthly Energy Use & Costs
- Completed Measures & Costs
- SB 1149 Account Balance
PUBLIC PURPOSE CHARGE (SB 1149)  
SCHOOLS PROGRAM

Schools Database:

Energy Efficient Schools Program

MAIN MENU

- 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.

- 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.

- 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.

Please note, after 60 minutes of inactivity you will automatically be logged out of the system.
# PUBLIC PURPOSE CHARGE (SB 1149) SCHOOLS PROGRAM

## Implementation Plan:

<table>
<thead>
<tr>
<th>Facility</th>
<th>Measure Type</th>
<th>Measure</th>
<th>Auditor</th>
<th>Audit Completed Date</th>
<th>Estimated Life</th>
<th>Estimated Cost</th>
<th>Total Estimated Dollars Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Install ASD on pump motor on hydronic systems.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>20</td>
<td>$78,188</td>
<td>2,522</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Install CO2 sensors for OSA control (referred to as CO2 demand controlled ventilation).</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>10</td>
<td>$43,044</td>
<td>1,599</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Install efficient ballasts with T8 or T5 lamps.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>15</td>
<td>$431,769</td>
<td>12,340</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Install weather stripping and door sweeps to the exterior doors.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>10</td>
<td>$9,413</td>
<td>453</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Replace inlet guide vanes with VFD’s.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>20</td>
<td>$75,214</td>
<td>1,462</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Add weather-striping and door sweeps to the eight sets of double doors. The weather-striping includes the entire perimeter and a single strip between the doors.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>10</td>
<td>$3,586</td>
<td>871</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Insulate piping and tank.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>15</td>
<td>$3,721</td>
<td>1,065</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Provide occupancy sensors to shut off the lights and HVAC when the gym is not in use.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>10</td>
<td>$14,348</td>
<td>468</td>
</tr>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Re-lamp and Re-ballast existing 32 watt T-8 fixtures with new low wattage lamps and low ballast factor ballasts.</td>
<td>Audit Firm</td>
<td>Aug-2012</td>
<td>15</td>
<td>$110,340</td>
<td>3,622</td>
</tr>
<tr>
<td>K-8 School</td>
<td>Energy Efficiency Measures</td>
<td>Total lighting retrofit including T12 to T8 conversion, improvement to CFL, and other modifications.</td>
<td>Audit Firm</td>
<td>Jun-2007</td>
<td>15</td>
<td>$72,628</td>
<td>9,501</td>
</tr>
</tbody>
</table>
## Implementation Plan:

<table>
<thead>
<tr>
<th>Estimated Simple Payback</th>
<th>SB1149 Eligible</th>
<th>Maximum Reimbursement of SB1149 Funds</th>
<th>Commissioning Required</th>
<th>Implementation According to PID</th>
<th>Planned Implementation Date</th>
<th>SB1149 Dollars</th>
<th>Tax Credit Dollars</th>
<th>Utility Incentives</th>
<th>Other Dollars</th>
<th>Comments</th>
<th>Audit Measure Id</th>
</tr>
</thead>
<tbody>
<tr>
<td>31.0</td>
<td>Yes</td>
<td>$50,410.00</td>
<td>No</td>
<td>No</td>
<td>Sep-2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>District planning installation Summer 2018</td>
<td>9256</td>
</tr>
<tr>
<td>26.9</td>
<td>Yes</td>
<td>$15,990.00</td>
<td>No</td>
<td>No</td>
<td>Sep-2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>District planning installation Summer 2018</td>
<td>9285</td>
</tr>
<tr>
<td>29.8</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Mar-2013</td>
<td>$367,249.62</td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9287</td>
</tr>
<tr>
<td>18.2</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Oct-2012</td>
<td>$8,228.10</td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9264</td>
</tr>
<tr>
<td>51.4</td>
<td>No</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9288</td>
</tr>
<tr>
<td>4.8</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Mar-2013</td>
<td>$4,222.78</td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9281</td>
</tr>
<tr>
<td>3.5</td>
<td>Yes</td>
<td>$15,975.00</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9279</td>
</tr>
<tr>
<td>30.7</td>
<td>Yes</td>
<td>$4,680.00</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9282</td>
</tr>
<tr>
<td>30.0</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Mar-2013</td>
<td>$106,491.54</td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>9283</td>
</tr>
<tr>
<td>9.9</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Aug-2011</td>
<td>$2,418.26</td>
<td></td>
<td></td>
<td></td>
<td>District planning on closing school in 2017 or rent out, measure no longer valid</td>
<td>6524</td>
</tr>
<tr>
<td>36.9</td>
<td>No</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>6522</td>
</tr>
<tr>
<td>0.9</td>
<td>Yes</td>
<td>N/A</td>
<td>No</td>
<td>Yes</td>
<td>Aug-2011</td>
<td>$99,608.74</td>
<td></td>
<td></td>
<td></td>
<td>Measure no longer valid, District is planning to sell building</td>
<td>6520</td>
</tr>
</tbody>
</table>
Utilizing both SB 1149 funds and Energy Trust incentives:

- Different programs with different requirements
- SB 1149 Maximum amount on plan is the max of both SB 1149 funds and Energy Trust incentives
- ODOE and Energy Trust working together to make the process as seamless as possible
- Benefit of utilizing both spreads out SB 1149 funds for additional projects
- Contact Christina Skellenger, Existing Buildings Account Manager with Energy Trust
PUBLIC PURPOSE CHARGE (SB 1149) SCHOOLS PROGRAM

Reporting data is important:

3 School Districts

3.1 Overview

The first 10 percent of the public purpose charge (PPC) funds are distributed directly to the 111 school districts located within PGE and Pacific Power’s service territories. Incorporation with the school district, Oregon Department of Energy (ODEE) facilitates the administration of the Public Purpose Charge (SB 1149) Schools Program. More than 800 schools within the 111 school districts are eligible for the program and PPC funding.

These funds are used for energy efficiency projects at individual schools within each school district. Specific guidelines must be followed for eligibility, reporting, and reimbursement processes. School districts may use PPC funds to:

1. Complete energy audits at eligible schools by a qualified energy audit firm. These energy audits identify energy efficiency opportunities (e.g., lighting upgrades, HVAC upgrades, building envelope improvements, etc.);
2. Implement eligible energy efficiency measures; and
3. Complete commissioning services of installed energy efficiency measures that are more complex (program guidelines specify measure categories that are required to have commissioning services completed).

ODEE provides program oversight of the energy audits and energy efficiency projects for the school districts to ensure consistency across the school districts and adherence to the program guidelines. The school districts receive the PPC funds directly from the utilities; however, they need ODEE approval to reimburse eligible expenditures with PPC funds. Prior to HR 990, which went into law in June 2011, the PPC funds were distributed to the education service districts to manage on behalf of the school districts.

3.2 Receipts and Expenditures

Table 3-1 summarizes the number of school districts that received PPC funds, the total fund receipts, and the total expenditures for the July 2011 through June 2012 biennium. The school district expenditures are categorized by audits, installed energy efficiency measures, commissioning costs, school district administrative expenses, ODEE administrative expenses, and ODEE program administration.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Efficiency Measures Installed 2015</td>
<td>102</td>
<td>123</td>
<td>405</td>
</tr>
</tbody>
</table>
Thank You!

Schools Program Contacts:
Christie Sphoon (503) 373-7430
Tracy Richardson (503) 373-2294