MAXIMIZING ENERGY FUNDS FOR SCHOOLS

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Oregon Department of Energy

Christina Skellenger
Energy Trust of Oregon, Existing Buildings Program

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Energy Trust of Oregon, New Buildings Program
INVESTOR-OWNED UTILITY TERRITORY MAP
<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>Audit is required before measures can be implemented (must start prior to demo)</td>
<td>Two incentive types:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Prescriptive incentives</strong> do not require audit</td>
</tr>
<tr>
<td></td>
<td>• <strong>Custom incentives</strong> require audit prior to procurement of equipment/start of construction</td>
</tr>
<tr>
<td>Audits paid by District SB 1149 funds</td>
<td>Audits paid by Energy Trust</td>
</tr>
<tr>
<td>• Several audit firms overlap SB 1149 &amp; Energy Trust list</td>
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</tr>
<tr>
<td>Must update Schools Interactive Database after construction with date installed and final cost, then submit final cost docs to ODOE</td>
<td>Prescriptive incentives must complete application after construction (within 90 days)</td>
</tr>
<tr>
<td></td>
<td>Custom incentives must provide final invoice after construction</td>
</tr>
<tr>
<td>SB 1149 funds based on measure life x annual energy savings</td>
<td>Funding based on cost effectiveness, energy savings</td>
</tr>
<tr>
<td>SB 1149 funds can pay for up to 100% of project costs for some projects</td>
<td>Funds can pay for up to 65% for most territories</td>
</tr>
<tr>
<td>Cannot fund projects within non-classroom facility</td>
<td>Can fund projects for any facility type</td>
</tr>
</tbody>
</table>
Energy Trust studies do not take the place of SB 1149 audits. If you want to take advantage of both programs, you will need an audit for both.

• Exception: lighting projects do not require an SB 1149 audit if Energy Trust Lighting tool is submitted to ODOE for review

We cannot double-dip funds. The incentives you receive from Energy Trust extend the life of your SB 1149 funds.

• Example:
  
  → If Boiler costs $100,000
  → ODOE max reimbursement would be $80,000
  → ETO incentive is $20,000 for boiler
  → Then ODOE will provide $60,000 reimbursement
## COLLECTIVE PROGRAM CAPS

### Sample Implementation Plan

<table>
<thead>
<tr>
<th>District Name</th>
<th>Plan Last Exported: 1/11/2019 4:17:00 PM</th>
<th>Plan Last Imported: 8/20/2018 3:43:00 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>School District Est. Year SB1149 Funds $5,000,000</td>
<td>Total SB1149 Funds on Completed Projects $3,000,000</td>
<td>Total SB1149 Funds on Audits $250,000</td>
</tr>
<tr>
<td>23</td>
<td>Total SB1149 Funds on Commissioning $0</td>
<td>Est. Remaining SB1149 Funds $1,750,000</td>
</tr>
</tbody>
</table>

Energy Trust incentives + SB 1149 cannot exceed SB 1149 Maximum Reimbursement

<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>
<th>Estimated Simple Payback</th>
<th>Maximum Reimbursement of SB1149 Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle School</td>
<td>Energy Efficiency Measures</td>
<td>Upgrade Lighting to LED</td>
<td>John Doe Company</td>
<td>Dec-2018</td>
<td>18</td>
<td>$25,000</td>
<td>$5,000</td>
<td>5</td>
<td>$90,000</td>
</tr>
</tbody>
</table>
1. Contact either Christie at ODOE or Christina at Energy Trust

2. Send requested ODOE/Energy Trust Sharing Consent email:
   I confirm that I am authorized to give this consent on behalf of [insert name of district] school district and, by this email, grant district’s permission to allow Energy Trust and Oregon Department of Energy to share information about district’s efficiency measure(s) and project(s) for the purpose of coordinating potential SB 1149 Schools Program and Energy Trust incentive maximum funding amounts.

3. Work with both programs to complete audits, as needed:
   • Review SB 1149 Implementation Plan to determine if a new audit is needed
   • Review Energy Trust brochure to determine if project is prescriptive or custom

4. ODOE and Energy Trust will work together to make the process as seamless as possible
CASE STUDY: GRESHAM-BARLOW SCHOOL DISTRICT

• Project Tracker developed to identify each project, estimated construction dates, SB 1149 max reimbursement (if applicable), and next steps for both programs
  • Ensures all projects are maximized through both programs, as applicable

• Hold monthly meetings with Energy Trust; Energy Trust brings in ODOE when needed

• Audits completed simultaneously by the same audit firm
  • Potential for audit savings through shared resources
BENEFITS OF USING BOTH PROGRAMS

• **Boiler example:** No existing SB 1149 audit in place, but boiler needed to be replaced ASAP (no time to study). The District will use the Energy Trust boiler incentive to complete project (prescriptive incentive).

• **Controls example:** Project was on the SB 1149 Implementation Plan and was studied by Energy Trust. Energy Trust did not find the project cost effective, so could not provide an incentive. District was able to benefit from SB 1149 funding (no cost effectiveness requirement).

• **Lighting example:** District wants to use both programs but the small lighting project did not warrant payment for an SB 1149 audit. District completed Energy Trust lighting tool, which was then sent to ODOE for measure to be added to Implementation Plan. District received estimated incentives from both Energy Trust and ODOE, up to the maximum reimbursement.
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