

HANDBOOK

PROPOSITION 39: California Clean Energy Jobs Act – 2015 ENERGY EXPENDITURE PLAN HANDBOOK



CALIFORNIA
ENERGY COMMISSION
Edmund G. Brown Jr., Governor

FEBRUARY 2015
CEC-400-2015-011

CALIFORNIA ENERGY COMMISSION

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ABSTRACT

The California Energy Commission has developed this *Energy Expenditure Plan Handbook* pursuant to the *Proposition 39: California Clean Energy Jobs Act – 2015 Program Implementation Guidelines (2015 Guidelines)* in accordance with Proposition 39 (2012) and Senate Bill 73 (Committee on Budget and Fiscal Review, Chapter 29, Statutes of 2013), adopted by the Legislature and signed into law by Governor Edmund G. Brown Jr. on June 27, 2013 and Senate Bill 852 (Budget Act of 2014) adopted by the Legislature and signed into law by Governor Edmund G. Brown Jr. on June 20, 2014 and adopted by the California Energy Commission at the December 10, 2014 Business Meeting.

Keywords: Proposition 39, California Clean Energy Jobs Act, Job Creation Fund, Senate Bill 73, energy efficiency, clean energy, conservation, conservation corps, school, community college, districts, workforce training, education, local educational agency, Energy Expenditure Plan Handbook, Energy Expenditure Plan Online

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Energy Expenditure Plan Handbook Overview

The California Energy Commission (Energy Commission) has developed the *2015 Energy Expenditure Plan Handbook* (handbook), Energy Expenditure Plan Online, the Utility Data Release Authorization form, and Energy Savings Calculators to help local educational agencies (LEAs) submit and complete their energy expenditure plan online applications that incorporate all the requirements of the *Proposition 39: California Clean Energy Jobs Act – 2015 Program Implementation Guidelines*. LEAs, which include county offices of education, school districts, charter schools, and state special schools, are the only entities that may submit energy expenditure plan packages online. This handbook, includes step-by-step instructions to assist the LEAs in submitting their energy expenditure plans online, explains program requirements and how to use the calculators for simple eligible energy projects.

What's New?

On December 10, 2014, the Energy Commission approved substantive program changes, thereby adopting the *Proposition 39: California Clean Energy Jobs Act – 2015 Program Implementation Guidelines (2015 Guidelines)*. Aside from the numerous clarification language revisions, the following savings-to-investment ratio (SIR) evaluation criteria were revised:

1. LEAs can now bundle energy efficiency measures and/or clean energy installations in or at one or more schools or sites within an LEA. The SIR will now be calculated at an LEA level as the LEA Project SIR. In the past, LEAs could only bundle energy efficiency measures and/or clean energy installations in or at a school or site. The SIR of 1.05 was calculated at a school or site level.
2. Leveraged funding that can be subtracted from the project installation cost in the SIR calculation has been revised. "Grants" were replaced by "non-repayable" funds. Non-repayable funds include bond funding, deferred maintenance, general operation budgets and other funds used to finance the project that does not need to be repaid by the LEA.

The new Energy Expenditure Plan Online system was developed to simplify the LEAs' application process, expedite the Energy Commission's review and approval process and to incorporate the SIR changes in the *2015 Guidelines*. Energy Expenditure Plan Online was launched in February 27, 2015.

This handbook reflects the following revisions related to the *2015 Guidelines* and the addition of Energy Expenditure Plan Online. The Energy Commission strongly encourages LEAs to read the handbook in detail before starting their energy expenditure plans online.

- Chapter 1: Revised to reflect the Energy Expenditure Plan Online system.
- Chapter 2: (NEW) Detailed instructions on how to fill out the new Energy Expenditure Plan Online system. In the previous version of the handbook, Chapters 2 and 3 contained instructions on how to fill out Form A and Form B. These forms are no longer applicable; therefore, this information was deleted and replaced by the new Chapter 2.
- Chapter 3: Revised. The Utility Data Release Authorization Form was revised in February 2015. Chapter 3 contains instructions on how to fill out the new Utility Data Release Authorization Form.
- Chapter 4: Revised. The Energy Savings Calculator is now in its Version 6. Chapter 4 contains detailed instructions on how to use the new version.
- Chapter 5: Revised. Information Required for Energy Audits has been revised to include non-repayable funds.
- Chapter 6: (NEW) Information Required for Power Purchase Agreement applications have now been included in Chapter 6.
- Appendix A: Energy Expenditure Plan Checklist revised to include examples of supporting documentation to be uploaded via Energy Expenditure Plan Online.

- Appendix B: Frequently Asked Questions: (NEW) Helpful frequently asked questions that provide additional information.

CHAPTER 1:

Energy Expenditure Plan

Purpose

The Energy Expenditure Plan is the application package an LEA submits to request Proposition 39 program award funds to implement eligible energy projects. The Energy Expenditure Plan includes all the information specified in the California Clean Energy Jobs Act – 2015 Program Implementation Guidelines.

Authority

Proposition 39: California Clean Energy Jobs Act – 2015 Program Implementation Guidelines (2015 Guidelines) in accordance with Proposition 39 (2012) and Senate Bill 73 (Committee on Budget and Fiscal Review, Chapter 29, Statutes of 2013), adopted by the Legislature and signed into law by Governor Edmund G. Brown Jr. on June 27, 2013, and Senate Bill 852 (Budget Act of 2014) adopted by the Legislature and signed into law by Governor Edmund G. Brown Jr. on June 20, 2014 and adopted by the California Energy Commission at the December 10, 2014 Business Meeting.

Who May Submit

LEAs with Proposition 39 award funding appropriations may submit an energy expenditure plan to request funds to implement eligible energy projects. These LEAs are listed at <http://www.cde.ca.gov/fg/aa/ca/prop39cceja.asp>. LEAs include county offices of education, school districts, charter schools, and state special schools. An expenditure plan submittal must include one eligible energy project. An *eligible energy project* is defined as energy efficiency measures and/or clean energy installations (in or at one or more school sites) within an LEA. In general, all facilities within the LEA are eligible to receive Proposition 39 award funding. If an LEA occupies a leased facility, the LEA needs to ensure the facility meets the conditions specified in the *2015 Guidelines*.

When to Submit

LEAs have been submitting their energy expenditure plans since January 2014 and may continue to do so throughout the term of this program. The Energy Commission strongly recommends that LEAs submit their energy expenditure plan prior to installing any eligible energy projects. If the LEA begins project implementation before receiving Energy Commission approval, it does so at its own risk. The Energy Commission must approve the LEA's energy expenditure plan before the California Department of Education (CDE) releases Proposition 39 program award funds.

The Energy Commission offers LEAs flexibility for submitting their energy expenditure plans to request award funding. LEAs have the option to submit an energy expenditure plan each fiscal year or they may combine eligible energy measures that incorporate multiyear awards into a single energy expenditure plan submission.

The CDE calculates and allocates each LEA Proposition 39 award funding each fiscal year based on legislatively appropriated funds. LEAs can receive Proposition 39 award funding only as it becomes available each fiscal year of the five-year program. **If the LEA's available award is not fully encumbered each year, the balance will remain for future energy expenditure plan requests.** The final encumbrance date for the Proposition 39 program is June 30, 2018.

In general, LEAs can submit only one energy expenditure plan per fiscal year. However, LEAs that receive an allocation of \$2 million or more in any one fiscal year, may submit up to three energy expenditure plans the year the allocation is received and each subsequent fiscal year. LEAs are encouraged to submit their energy expenditure plans as soon as energy projects have been identified to allow timely review and approval by the Energy Commission. This early submission also allows for LEAs to meet their targeted eligible energy project implementation schedules and to achieve energy savings as soon as possible.

What Documents and Information to Compile Before Completing an Energy Expenditure Plan Online

LEAs must gather and compile the following documents and information to complete an energy expenditure plan online.

1. If an LEA uses energy surveys or energy audits, these need to be completed prior to completing an Energy Expenditure Plan Online application. These documents provide information such as descriptions of the existing and proposed equipment, energy and cost savings, and a proposed budget for project costs. LEAs will need to transfer this information from the energy surveys and energy audits into the Energy Expenditure Plan Online application, where applicable. The energy surveys and energy audits are required to be submitted as backup documentation to support the information entered into the system. At a minimum, energy audits must contain information as specified in Chapter 5 of this handbook.
2. If an LEA uses the Energy Commission's energy savings calculators tool to calculate energy savings for simple eligible energy projects, this tool needs to be completed prior to completing the Energy Expenditure Plan Online application. Information from these calculators will need to be transferred into the Energy Expenditure Plan Online application, where applicable. The energy savings calculator tool is required to be submitted as supporting documentation to support the information entered into the system. The most recent version of the energy savings calculator must be used.

3. LEAs must collect electric and gas utility bills from the previous fiscal year for all schools or sites where eligible energy measures will be implemented to complete their energy expenditure plan. This means that if you are submitting an energy expenditure plan during fiscal year 2013-2014, you will need to collect the bills from fiscal year July 1, 2012, through June 30, 2013.
4. LEAs that requested and received energy planning funds must provide a financial breakdown of how the planning funds are budgeted and how planning funds were actually spent for each of the four allowed categories.
5. LEAs must submit their entity information, including but not limited to CDS codes, charter school CDS codes, and contact information of the LEA authorized representative and the LEA project manager.
6. An estimate of job creation benefits is required to be keyed into the system. These are mostly calculated fields based on the eligible energy project budgets entered by the LEA. If the LEA has already selected a contractor to implement its eligible energy project, it will need to obtain apprenticeship programs and trainee title information when completing its energy expenditure plan.

What to Include in the Energy Expenditure Plan

Effective February 27, 2015, LEAs are required to enter all the necessary information related to their projects into the Energy Commission's Energy Expenditure Plan Online system. **LEAs will no longer be able to upload Expenditure Plan General Form A (Form A), CEC-9, and Expenditure Plan Project Summary Form B (Form B), CEC-10, Microsoft Excel® spreadsheets.** All information that was previously entered into these spreadsheets will now be keyed in directly into Energy Expenditure Plan Online. However, the following supporting documents will still need to be uploaded into Energy Expenditure Plan Online:

1. Utility Data Release Authorization Form, CEC-12, in PDF, and the Facility and Service Account Information Form, CEC-24, in PDF – An LEA must complete a Utility Data Release Authorization Form for every utility provider from which the LEA purchases electricity and/or natural gas. For example, if an LEA purchases electricity from the Sacramento Municipal Utility District (SMUD) and natural gas from Pacific Gas and Electric (PG&E), the LEA must complete two Utility Data Release Authorization Forms, one for SMUD and another for PG&E. The Energy Commission requires that the Utility Data Release Authorization Form be submitted only with the first energy expenditure plan that an LEA submits for approval. However, even if the LEA submitted a Utility Data Release Authorization Form prior to March 1, 2015, the LEA's electric or natural gas utility may require the LEA to sign and submit an updated Utility Data Release Authorization Form.

In the Facility and Service Account Information Form, CEC-24, LEAs must list every electric and gas account for all schools and facilities under a customer's jurisdiction, as a condition of receiving Proposition 39 funds. This includes the school/facility name, CDS number, electric and/or gas service account number, and service address. It is critical that the LEA provide this information for EVERY school in the LEA regardless of whether the school site is a recipient of Prop 39 funds.

If the LEA has already submitted this information prior to March 1, 2015, it is not necessary for the LEA to submit a Facility and Service Account Information Form unless there have been any changes to the number of facilities under its jurisdiction since the last energy expenditure plan was submitted (that is, facilities have closed or new facilities have opened). These two forms must be completed using a computer, printed, signed by the LEA authorized representative, then scanned and uploaded to Energy Expenditure Plan Online. The authorized representative is an LEA employee with authorization to execute the energy expenditure plan and the Utility Data Release Authorization Form, and authority to direct or delegate implementation of the eligible energy projects on behalf of the LEA. The LEA must forward the original signed Utility Data Release Authorization Form(s) to the respective utility providers. Mailing addresses to the utility providers will be provided at the Proposition 39 website: <http://www.energy.ca.gov/efficiency/proposition39/>.

2. Project Supporting Documents – Each energy expenditure plan must include back-up calculations/analysis supporting the eligible energy measure details an LEA provides in Energy Expenditure Plan Online. Easily uploadable formats like Microsoft Word®, PDF, Microsoft Excel® can be uploaded into the system.
 - a. Energy Savings Calculators – The Energy Commission has developed energy savings calculators to assist LEAs with their simple measures. Please refer to Chapter 4 for a list of energy savings calculators. LEAs may use only the energy savings calculators for the simple measures listed in Chapter 4. LEAs must submit a separate energy survey with the elements listed in #2b below of this section. However, LEAs need not submit a separate energy audit if they choose to use the energy savings calculators for the simple measures listed in Chapter 4.
 - b. Energy Survey – An LEA must upload any applicable energy surveys that will validate the energy savings entered into the system. LEAs may choose to use the energy savings calculators to quantify the energy savings for their eligible energy measures. An energy survey must include:
 - A description of the proposed energy efficiency measures and the buildings or facilities that will be improved by these measures.
 - A description of the existing energy-using equipment (that is, type, age of equipment, size, number of units, operating hours, and so forth.)
 - Energy Savings estimates from the online energy savings calculator tool.

- A proposed budget detailing all energy efficiency measure cost.
- c. Energy Audit – Upload any applicable energy audits, complying with the “Information Required for Energy Audits” found in Chapter 5, that will validate the energy savings calculations entered into the system. LEAs do not need to submit an energy audit if they have used the energy savings calculators to quantify the energy savings for their eligible energy measures.
3. Building Owner Certification to Transfer Energy Cost Savings to LEA, if applicable – To ensure an LEA in a privately owned leased facility receives the energy savings cost benefit of the Proposition 39-funded eligible energy measures, a building owner certification is required if 1) an LEA leases a facility or building that does not have a separate meter; and/or, 2) an LEA leases a facility or building, and the lease payment includes the utility cost. If either of these conditions applies, the building owner must commit to transferring the energy savings of the eligible energy measures to the LEA tenant, either through a reduced lease payment or other form of monetary reimbursement. LEAs in a privately owned leased facility that meet the two conditions mentioned above shall submit a Building Owner Certification to Transfer Energy Cost Savings to the LEA, in writing, signed and dated by the lessor, that certifies energy savings cost benefit to the LEA.

What Internet Browsers to Use

To ensure optimal user experience, LEAs must only use Internet Explorer or Google Chrome to access Energy Expenditure Plan Online.

How and Where to Submit Energy Expenditure Plans to the Energy Commission via Energy Expenditure Plan Online

On February 27, 2015 when the Energy Expenditure Plan Online was launched, LEAs are no longer able to upload Form A and Form B spreadsheets into the Proposition 39 Database. LEAs now must enter all information they previously entered into Form A and Form B into Energy Expenditure Plan Online. In addition, LEAs are required to upload the documents listed under “What to Include in the Energy Expenditure Plan.” Energy expenditure plans are also NOT accepted by mail, e-mail, fax, or courier delivery. Only energy expenditure plans entered into Energy Expenditure Plan Online and documents uploaded via this system will be accepted.

The Energy Commission has sent a “Welcome” e-mail containing a link to Energy Expenditure Plan Online to all primary and secondary LEA contacts listed in the California School Directory. The person who submits the energy expenditure plan must obtain the link to Energy Expenditure Plan Online from those contacts.

The first time LEAs access the website via the link, they must register and follow the instructions in Chapter 2.

Whom to Contact for Assistance

The Energy Commission has established a Proposition 39 Hotline (toll-free for those in-state: 855-380-8722, and a toll line for those out of state: 916-653-0392.) LEAs can call with questions about the Proposition 39 program and Energy Expenditure Plan Online. LEAs can also e-mail questions to the Energy Commission Hotline staff at Prop39@energy.ca.gov.

CHAPTER 2:

Instructions for the Energy Expenditure Plan Online

Purpose

Energy Expenditure Plan Online is an online application system to assist LEAs to apply for Proposition 39 program award funds to implement eligible energy projects. Effective February 27, 2015, LEAs must submit their energy expenditure plans using the Energy Expenditure Plan Online system. Developed by the Energy Commission, this flexible, easy-to-use system replaces the previous energy expenditure plan Forms A and B application process. LEAs now enter their information directly into Energy Expenditure Plan Online.

The following are the instructions for Energy Expenditure Plan Online. To guide the reader through each section, there is a screen shot of the specific section of the system, followed by written instructions.

General Information and Tips

To navigate through the system, either click on a field or use the “Tab” key on your keyboard. The types of input fields vary. Drop-down menus are indicated by an arrow on the right side of the data field. Other fields allow LEAs to enter text or numbers dependent on what information is requested. Auto calculated fields in the system are automatically calculated based upon entries in other input fields. Automatically calculated fields are shaded in gray and the LEA cannot click in to those fields to enter data. LEAs are required to complete only the input fields. These fields turn yellow when you click on them to enter your data.

Hovering your cursor over certain fields will bring up a pop-up box that provides general instructions for the field. Several fields will also show an “i” next to the field. This provides additional information about that field.

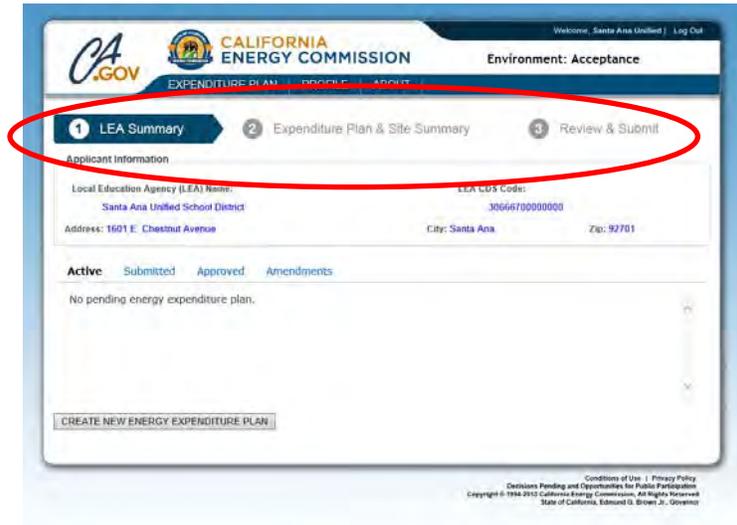
Information entered into the Energy Expenditure Online system is not automatically saved. Be sure that you save your information by clicking on the SAVE CURRENT PROCESS button periodically while you are entering your energy expenditure plan.

General Overview and System Navigation

As an overview of Energy Expenditure Plan Online, there are three major sections:

- 1) LEA Summary
- 2) Expenditure Plan & Site Summary
- 3) Review & Submit

As you navigate through the system, the section bar at the top indicates the section you are currently working in.

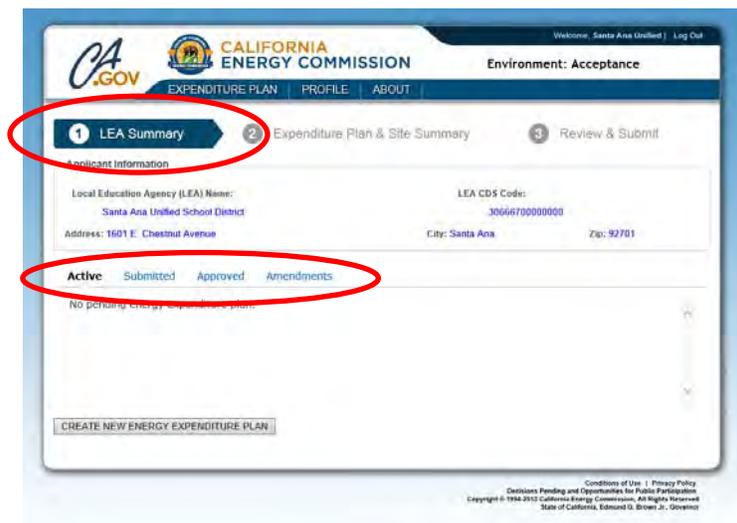


Each major section has subsections.

- 1) LEA Summary has four subsection tabs:
 - ✓ **Active** (energy expenditure plans being created by the LEA)
 - ✓ **Submitted** (energy expenditure plans submitted to the Energy Commission)
 - ✓ **Approved** (energy expenditure plans approved by the Energy Commission)
 - ✓ **Amendments** (still under construction)

The LEA Summary section provides the map for accessing and reviewing all of an LEA's energy expenditure plans. Whether it is a current energy expenditure plan that is in draft or an energy expenditure plan approved in past fiscal years, all energy expenditure plans can be accessed from the LEA Summary section. Energy expenditure plans in the Submitted and Approved subsections can be viewed by the LEA. Information in these energy expenditure plans cannot be edited by the LEA.

To actually navigate through the system, you must click on these tabs. Each tab is typically in "blue" text. The tab text color changes to "black" when you are in that tab section. To view/edit a specific energy expenditure plan, you must navigate to the appropriate subsection and select



and click the energy expenditure plan from the list of energy expenditure plans included in that subsection.

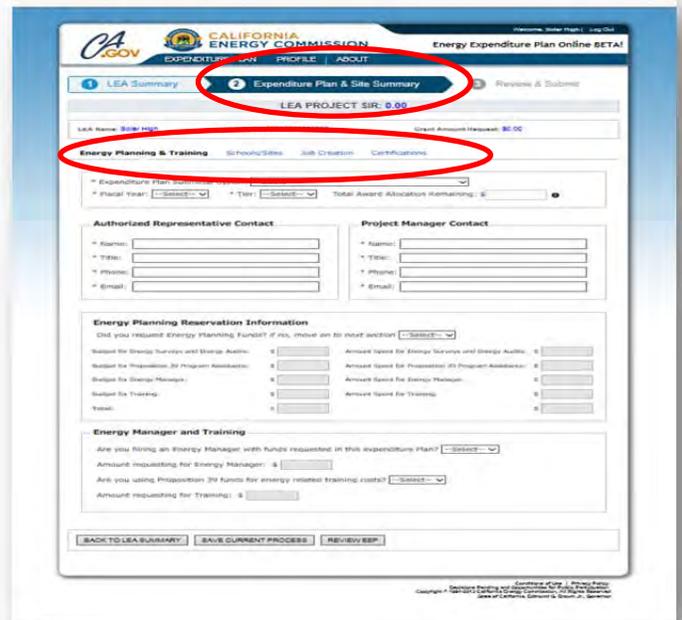
2) Expenditure Plan & Site Summary Section has four subsection tabs:

- ✓ Energy Planning & Training
- ✓ Schools/Sites
- ✓ Job Creation
- ✓ Certifications

The majority of the LEA information is entered into these four tabs.

Energy Planning & Training, Job Creation, and Certifications subsections relate to information in the old Form A.

To enter specific site information, you must navigate to the Schools/Sites subsection and add a specific site or select a previously added site from a list of sites. Information entered into these specific Schools/Sites relates to information in the old Form B.



Schools/Sites Tab summarizes all the sites included in the energy expenditure plan. This tab includes the following additional subsection tabs:

- ✓ Site
- ✓ Benchmarking
- ✓ Efficiency Measure
- ✓ Photovoltaic
- ✓ Power Purchase Agreements
- ✓ Summary

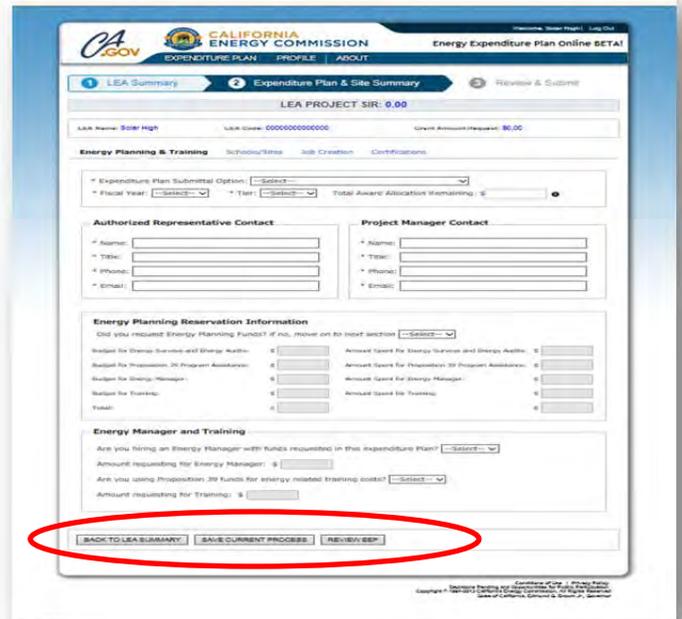
Benchmarking information and all eligible energy measures details for a specific school/site are entered using these additional School/Site tab subsection. These six subsections related to information in the old Form B.



Navigation Buttons in the Energy Plan & Site Summary Section:

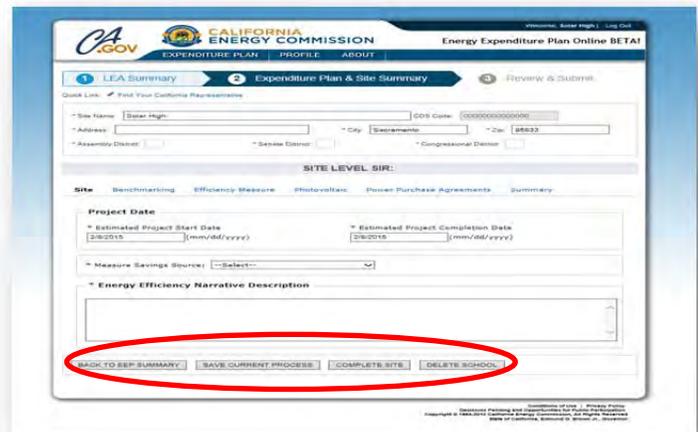
The Energy Planning & Training, Job Creation, and Certification Subsections:

- ✓ **BACK TO LEA SUMMARY** – Brings you back to the list of energy expenditure plans in the LEA Summary Major Section.
- ✓ **SAVE CURRENT PROCESS** – Saves all the information you keyed in so far. The information is not automatically saved and this button should be used often.
- ✓ **REVIEW EEP** – Click this button to review your energy expenditure plan before submitting to the Energy Commission.



The Schools/Sites Subsection:

- ✓ **BACK TO EEP SUMMARY** – Brings you back to your list of sites.
- ✓ **SAVE CURRENT PROCESS** – Saves all information you have entered so far. Please note that information is not automatically saved and this button should be used often.
- ✓ **COMPLETE SITE** – Click this button when all appropriate information for the specific school/site has been entered.
- ✓ **DELETE SCHOOL** – Deletes the specific school/site that has been entered in error.



Getting Started

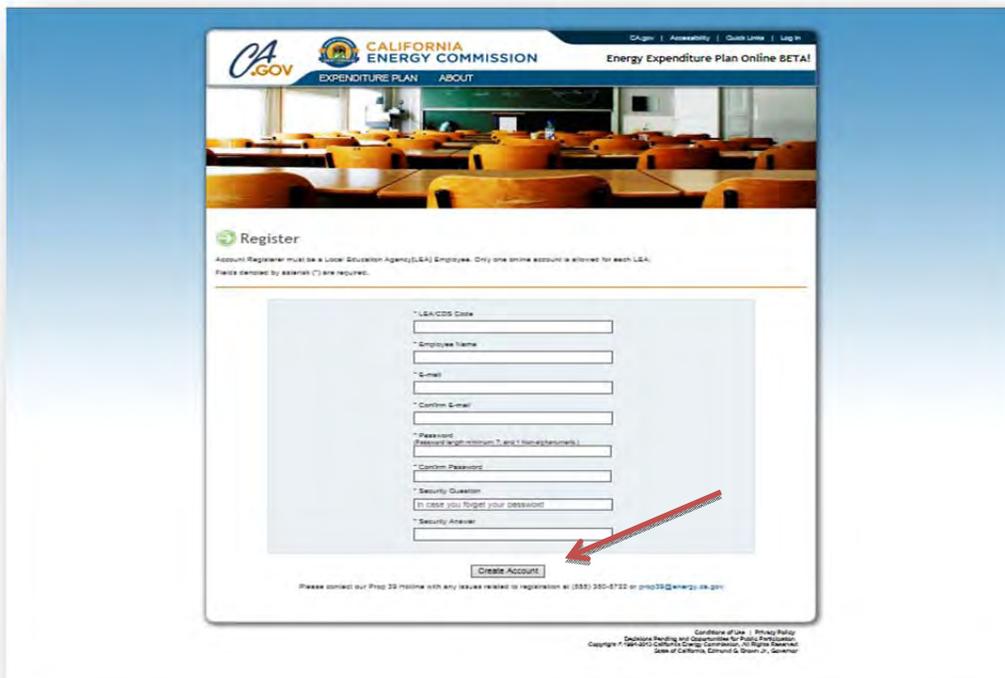
An LEA is required to register to create an account prior to being able to log in to the system. Below are the instructions for logging in and creating an account.



The link provided to the LEA contact and secondary contact will bring the user to the Energy Expenditure Plan Online login page shown above. Anytime you log onto the system the Terms & Agreements statement will appear. To use Energy Expenditure Plan Online, you must read the Terms & Agreements and click "Agree."



To register, click on the [Register](#) link located at the bottom of the page (see arrow above.)



Only an LEA employee can create an account and LEAs are allowed to have only one online account. To create an LEA account, enter the following required fields:

LEA/CDS Code: Enter the LEA's 14-digit CDS code.

Employee Name: Enter the name of the person creating the account. The account must be registered to an employee of the LEA.

E-mail: Enter the e-mail address of the person creating the account. This e-mail address will be used to contact the LEA if a password reset request is made.

Confirm E-mail: Re-enter the e-mail address.

Password: Select and enter a password. Passwords must have at least 7 characters and must include a non-alphanumeric character (e.g. @, #, ^).

Confirm Password: Re-enter the selected password.

Security Question: Create a security question and enter it in this field. For example, "What is your favorite color?" There is no a drop-down list of possible security questions. The security question will be used to validate your log in if you forget your password.

Security Answer: Enter the answer to your security question above. For example, if your security question is "What is your favorite color?" Enter your favorite color in this field. For example, you may type in "blue." Tip: Security question answers are not case-sensitive.

Then, click on **Create Account**. At this point, your registration is not yet complete.

Final Registration Step: An account activation e-mail will be sent to the above specified e-mail address. On a separate window on your browser, log into the e-mail address you entered when you registered to Energy Expenditure Plan Online. Look for an e-mail that looks like the example below. To complete the account activation process, click on the link provided in the e-mail. You will then be taken to a webpage with a message saying, "Your account has been verified and you can now log into the site." Your registration is complete and you can now log in at this time using the LEA CDS Code and password. If you experience any difficulties, please reply to the e-mail you received, like the example below and someone will contact you to provide assistance. Alternatively, contact our Prop 39 Hotline at (855) 380-8722 or prop39@energy.ca.gov. You must click on the link sent to your e-mail address to complete the registration process.

Welcome to California Clean Energy Jobs Act!

Hello, _____. You are receiving this email because you recently created a new account at the site. Before you can login, however, you need to first visit the following link:

<http://accprop39/Account/Verify.aspx?ID=b090a2b4-a238-41bc-92cf-05f84aef9df0>

After visiting the above link you can log into the site!

If you have any problems verifying your account, please reply to this email to get assistance.

Thanks!

Forgot Your Password?

CA.GOV CALIFORNIA ENERGY COMMISSION Energy Expenditure Plan Online BETA
EXPENDITURE PLAN ABOUT

Log In

LEA Code

Password

The application locks a user out after 5 failed login attempts.

[Forgot your password?](#)

Keep me logged in

Don't have an account?
[Register](#)

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State of California, Edmund G. Brown Jr., Governor

If you forget your password, click on the **“Forget your Password?”** link in the “Log In” page (see above.) Enter your LEA 14 digit CDS code and respond to your security question. The answer to your security question is not case-sensitive. A new password will be generated and sent to the e-mail address registered for the LEA.

Next, log in at the “Log In” page using the password sent to your e-mail address. This password is case-sensitive and can be copied and pasted from the e-mail you received. The system will then ask you to select a new password.

Once you have successfully reset your password, you may log into the “Log In” screen and create an energy expenditure plan.

Logging In

CA.GOV CALIFORNIA ENERGY COMMISSION Energy Expenditure Plan Online BETA

EXPENDITURE PLAN ABOUT

Log In

LEA Code

Password

The application locks a user after 5 failed login attempts.

[Log In](#) [Forgot your password?](#)

Keep me logged in

Don't have an account? [Register](#)

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To log in to Energy Expenditure Plan Online, simply enter the LEA's CDS code, enter your password and click on the **Log In** button. The application locks you out after five failed login attempts. If this happens, an error message will appear and tell you how long you will need to wait before logging in again. If you forgot your password, follow the instructions in the "Forgot Your Password?" section above.

Creating a New Energy Expenditure Plan

Once you have logged in, you can now create a new energy expenditure plan. **Information entered into Energy Expenditure Plan Online is not automatically saved. Be sure that you save your information by clicking on the Save Current Process button periodically while you are entering your energy expenditure plan.**

1. Click on the **CREATE NEW ENERGY EXPENDITURE PLAN** button.

CA .GOV CALIFORNIA ENERGY COMMISSION Energy Expenditure Plan Online BETA!

EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Applicant Information

Local Education Agency (LEA) Name: Solar High LEA CDS Code: 00000000000000

Address: 1 Turbine Rd. City: Sacramento Zip: 95833

Active Submitted Approved Amendments

ID	Fiscal Year	Submittal Option	Amount Requested
345			\$0.00

CREATE NEW ENERGY EXPENDITURE PLAN

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Decisions Pending and Opportunities for Public Participation
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2. This will pull up the screen below and you must enter the following information:

CA .GOV CALIFORNIA ENERGY COMMISSION Energy Expenditure Plan Online BETA!

EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Expenditure Plan Option

* Fiscal Year: --Select-- * Expenditure Plan Submittal Options: --Select--

Authorized Representative Contact

Name: [] Title: [] Phone: [] E-mail: []

Project Manager Contact

Name: [] Title: [] Phone: [] E-mail: []

CREATE CANCEL

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Expenditure Plan Option (required)

- a. **Fiscal Year:** This drop-down menu corresponds to the current fiscal year in which you are submitting the Energy Expenditure Plan. This is a required field.
- b. **Expenditure Plan Submittal Option:** This is a drop-down menu. Select “Annual Award Energy Expenditure Plan” if this Energy Expenditure Plan covers one fiscal year. Select “Multiple-Year (bundled) Award Expenditure Plan” if this Energy Expenditure Plan covers two, three, four, or five fiscal years. This is a required field.

Authorized Representative Contact (required)

- a. Enter the **name, title, phone number, and e-mail address** of the person authorized by your LEA to sign and submit the energy expenditure plan(s) and other Proposition 39 documents to the Energy Commission. **The authorized representative is an LEA employee with authority to execute the energy expenditure plan and the Utility Data Release Authorization Form, and to direct or delegate the implementation of the eligible energy projects on behalf of the LEA.** Only one authorized representative may be entered in this section.

Project Manager Contact (required)

- a. Enter the **name, title, phone number, and e-mail address** of your LEA’s project manager. **The project manager is the primary point of contact for this energy expenditure plan.** Only one project manager may be entered in this section.

Click **CREATE** once all fields are completed. To cancel the energy expenditure plan you just created, click on the **CANCEL** button. You will then be returned to the LEA Summary Section.

Entering Your Energy Expenditure Plan

Once you click **CREATE**, you will be brought to the Energy Planning and Training subsection. The screen will expand and look like the following:

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EXPENDITURE PLAN PROFILE ABOUT

Welcome, Solar High | Log Out
Energy Expenditure Plan Online BETA!

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

LEA PROJECT SIR: 0.00

LEA Name: Solar High LEA Code: 00000000000000 Grant Amount Request: \$0.00

Energy Planning & Training Schools/Sites Job Creation Certifications

* Expenditure Plan Submittal Option: --Select--
* Fiscal Year: --Select-- * Tier: --Select-- Total Award Allocation Remaining: \$

Authorized Representative Contact
* Name: * Title: * Phone: * Email:

Project Manager Contact
* Name: * Title: * Phone: * Email:

Energy Planning Reservation Information
Did you request Energy Planning Funds? if no, move on to next section --Select--
Budget for Energy Surveys and Energy Audits: \$ Amount Spent for Energy Surveys and Energy Audits: \$
Budget for Proposition 39 Program Assistance: \$ Amount Spent for Proposition 39 Program Assistance: \$
Budget for Energy Manager: \$ Amount Spent for Energy Manager: \$
Budget for Training: \$ Amount Spent for Training: \$
Total: \$

Energy Manager and Training
Are you hiring an Energy Manager with funds requested in this expenditure Plan? --Select--
Amount requesting for Energy Manager: \$
Are you using Proposition 39 funds for energy related training costs? --Select--
Amount requesting for Training: \$

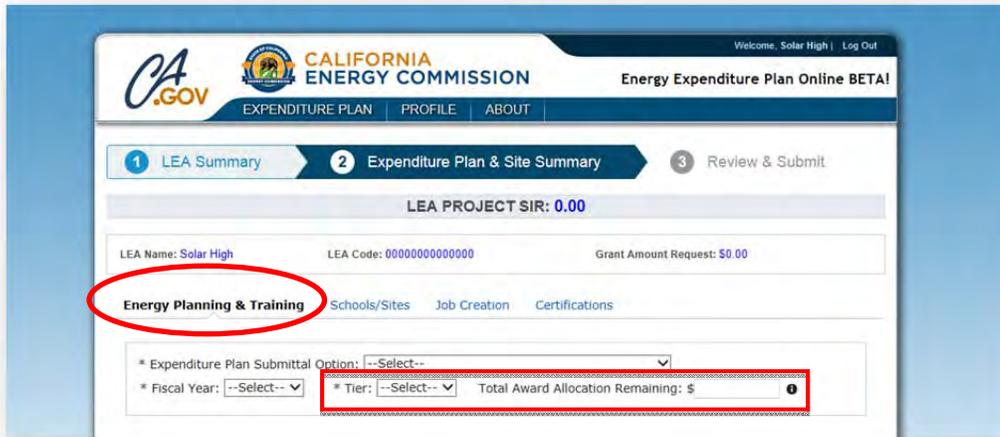
BACK TO LEA SUMMARY SAVE CURRENT PROCESS REVIEW EEP

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The **LEA Name** and **LEA Code** will be automatically filled in, and the **Grant Amount Request** is automatically filled in based on the information you will be keying in.

The **LEA Project SIR** will be automatically calculated based on the energy measures and energy savings information keyed into the Schools/Site section. The LEA Project SIR is the SIR calculated based on the LEA's bundled energy efficiency measures and/or clean energy

installations in or at one or more schools or sites within an LEA. This SIR is calculated at an LEA level. The LEA Project SIR must equal 1.05 or higher to receive Proposition 39 award funds.



First Section: Energy Planning & Training Section

- a. **Expenditure Plan Submittal Option** and **Fiscal Year** fields are automatically filled in when the energy expenditure plan was created.
- b. **Tier:** This is a drop-down menu. Select the tier that matches your LEA's P-2 ADA listed in CDE's *Schedule of the Total Award Allocations for the Proposition 39 – California Clean Energy Jobs Act* for the fiscal year in which you are submitting this energy expenditure plan.
 - Tier 1: 100 or fewer ADA
 - Tier 2: 101-1000 ADA
 - Tier 3: 1,001-1,999 ADA
 - Tier 4: 2,000 or more ADA
- c. **Total Award Allocation Remaining:** Enter your LEA's available award allocation. This value can be determined by adding the amount in the Total Award Allocation column found in the Proposition 39 -2014-15 Entitlements spreadsheet (<http://www.cde.ca.gov/fg/fo/r14/prop39ccej14result.asp>) to the amount in the Total Award Allocation Remaining column found in the Proposition 39 - 2013-14 Entitlements spreadsheet (<http://www.cde.ca.gov/fg/fo/r14/prop39ccej13result.asp>).

Energy Planning Reservation Information

Note: This section applies to LEAs that have requested and received planning funds in Fiscal Year 2013-14 or their first year of Proposition 39 program eligibility.

For new schools commencing instruction in fiscal year 2013-14 or later, energy planning funds will be available in the first fiscal year of Proposition 39 funding eligibility, so long as prior year average daily attendance (ADA) counts are provided during the second principal apportionment reporting period. For example, a school that begins instruction in fiscal year 2013-14 can use fiscal year 2014-15 award funds for planning activities, provided 2013-14 ADA counts are available. So, this section will also apply to schools that request and receive planning funds in the first fiscal year of Proposition 39 award eligibility.

The screenshot shows a form titled "Energy Planning Reservation Information". At the top, it asks "Did you request Energy Planning Funds? If no, move on to next section" with a dropdown menu currently set to "--Select--". Below this are four rows of input fields, each with a dollar sign and a text label on the left and a dollar sign and text label on the right. The rows are: "Budget for Energy Surveys and Energy Audits", "Budget for Proposition 39 Program Assistance", "Budget for Energy Manager", and "Budget for Training". The "Total:" row is at the bottom left.

- a. ***Did you request Energy Planning Funds? If no, move on to next section:*** This is a drop-down menu. Select “yes” if your LEA requested planning funds during fiscal year 2013-2014 or the LEA’s first year of Proposition 39 program eligibility. Select “no” if your LEA did not request planning funds. If you select “no,” move to the Energy Manager and Training section.
- b. ***Budget for Energy Surveys and Energy Audits:*** Of the total Proposition 39 award for planning funds allocated to your LEA, enter the portion budgeted for energy surveys and energy audits for all five years of the program.
- c. ***Budget for Proposition 39 Program Assistance:*** If applicable, enter the total Proposition 39 grant planning funds budgeted for program assistance activities, including but not limited to putting together the energy expenditure plan as defined in the *2015 Guidelines* Table 2: Energy Planning Activities for all five years of the program.
- d. ***Budget for Energy Manager:*** If applicable, enter the total Proposition 39 award planning funds budgeted for an energy manager(s) as defined in the *2015 Guidelines* Table 2: Energy Planning Activities, enter the amount of energy planning funds budgeted for an energy manager(s).

- e. **Budget for Training:** If applicable, enter the total Proposition 39 award planning funds budgeted for energy-related training as defined in the 2015 Guidelines Table 2: Energy Planning Activities, enter the amount of energy planning funds budgeted for these training expenditures.
- f. **Amount Spent for Energy Surveys and Energy Audits:** If applicable, enter the total amount of your Proposition 39 planning reservation spent to date on energy surveys and energy audits.
- g. **Amount Spent for Proposition 39 Program Assistance:** If applicable, enter the total amount of your Proposition 39 planning reservation spent to date on program assistance activities.
- h. **Amount Spent for Energy Manager:** If applicable, enter the total amount of your Proposition 39 planning reservation spent to date on energy manager(s).
- i. **Amount Spent for Training:** If applicable, enter the total amount of your Proposition 39 planning reservation spent to date on training.
- j. **Totals:** The total amount of energy planning funds requested and the total amount of planning funds spent to date. These are automatically calculated fields, and the total amounts will be based on information provided in the input fields.

Energy Manager and Training:

Note: This section relates to the funds you are requesting under this current energy expenditure plan, not the planning funds entered in the previous section. This section should be completed for years 2 through 5 of the Proposition 39 program.

The screenshot shows a form titled "Energy Manager and Training" with the following fields:

- A dropdown menu: "Are you hiring an Energy Manager with funds requested in this expenditure Plan? --Select--" with a downward arrow.
- A text input field: "Amount requesting for Energy Manager: \$" followed by a small rectangular box.
- A dropdown menu: "Are you using Proposition 39 funds for energy related training costs? --Select--" with a downward arrow.
- A text input field: "Amount requesting for Training: \$" followed by a small rectangular box.

- a. **Are you hiring an Energy Manager with funds requested in this Expenditure Plan?** This drop-down menu indicates whether the LEA is requesting award funds for energy manager (s) under this energy expenditure plan. Select "yes" if the LEA is requesting funds for energy manager(s) or "no" if the LEA is not.
- b. **Amount requesting for Energy Manager:** Enter the total amount of your LEA's Proposition 39 award funds requested for energy manager(s) in this energy

expenditure plan. The maximum allowed amount is 10 percent of the annual award amount. This is for years 2 through 5 only. In year 1, funds for an Energy Manager are requested utilizing planning funds.

- c. *Are you using Proposition 39 funds for energy-related training costs?* This drop-down menu indicates whether the LEA is requesting award funds for energy related training costs under this energy expenditure plan. Select “yes” if the LEA is requesting funds for energy related training costs or “no” if the LEA is not.
- d. *Amount requesting for Training:* Enter the total amount you are requesting for energy related training costs. The maximum allowed amount is 2 percent of the annual award amount. This is for years 2 through 5 only. In year 1, funds for an Energy Manager are requested utilizing planning funds.

Second Section: Schools/Sites

After you have completed the Energy Planning & Training section of your energy expenditure plan, you may enter the information for each of your LEA’s schools or sites. Click on the [Schools/Sites](#) tab heading (see arrow below.)

The screenshot displays the 'Energy Expenditure Plan Online BETA!' interface. At the top, there are logos for 'CA.GOV' and the 'CALIFORNIA ENERGY COMMISSION'. The page is divided into three main sections: '1 LEA Summary', '2 Expenditure Plan & Site Summary' (which is active), and '3 Review & Submit'. Below these sections, the 'LEA PROJECT SIR: 0.00' is displayed. The 'LEA Name' is 'Solar High', the 'LEA Code' is '00000000000000', and the 'Grant Amount Request' is '\$0.00'. There are four tabs: 'Energy Planning & Training', 'Schools/Sites' (circled in red), 'Job Creation', and 'Certifications'. Below the tabs, there is a search field for school names with an 'ADD' button. A red arrow points to this 'ADD' button. Below the search field, there is a section for 'Supporting Documents' with a 'Select File' button and a note about file size and type. At the bottom, there are three buttons: 'BACK TO LEA SUMMARY', 'SAVE CURRENT PROCESS', and 'REVIEW EEP'. The footer contains copyright information for the California Energy Commission.

In the school name field, click on the down arrow of the drop down box (see arrow above) and select the school for which you will be entering information. If you are entering information for a non-school site such as the district's Administration Office or Maintenance Office, select the district in the drop down box. The district is designated by the word (District) in front of the district name. Then, click **ADD**. As you add schools/sites into your energy expenditure plan, the name of the school is removed from the list of schools so you do not select the same school/site again.

The schools listed in the drop down box are taken from CDE and may include some schools that may have already been closed. Do not enter the name of a closed school.

First Schools/Site Subsection: Site

Once you click **ADD** above, the screen will expand and look like this:

- a. **Site Name:** This field is automatically populated if a school was selected and added from the Schools/Site section. If you have selected a district non-school, this field will be blank. You may then key in the name of the site. For example, if you are keying in information on the Administration Building, you may type in Administration Building in this field.

- b. **CDS Code:** This field is automatically populated from your selection from the previous page.
- c. **Address:** Enter the physical or mailing address of this school or site where your LEA plans to implement this energy project.
- d. **City:** This is an automatically populated field and shows the name of the city where this school or site is located.
- e. **Zip Code:** This is an automatically populated field and shows the zip code of the school or site where this project is proposed.
- f. **Assembly District:** Enter the Assembly District in which the school/site is located. If you don't know the LEA's Assembly District, click on the **Find Your California Representative** link on the upper left-hand corner or click on this link <http://findyourrep.legislature.ca.gov/>. Complete the address information and the Assembly and Senate Districts are identified.
- g. **Senate District:** Enter the Senate District in which the school/site is located. If you don't know the LEA's Senate District, click on the **Find Your California Representative** link on the upper left hand corner or click on this link <http://findyourrep.legislature.ca.gov/>. Complete the address information and the Assembly and Senate Districts are identified.
- h. **Congressional District:** Enter the Congressional District in which the school/site is located. If you don't know the LEA's Congressional District, click on the following link in house.gov, <http://www.house.gov/representatives/find/> You may have to enter your zip code + 4 or a specific address to find your specific Congressional District out of a possible list of Congressional Districts.
- i. **Site Level SIR:** The SIR is automatically calculated for you from other fields you will enter in subsequent subsections and reflects the combined SIR for all of the measures proposed for the energy project at this school or site. The SIR requirement of 1.05 no longer pertains to the site level SIR.

Project Date:

- j. **Estimated Project Start Date:** Enter the estimated date when your LEA plans to begin implementing the eligible energy project. Please use the mm/dd/yyyy to enter the date. A calendar pop-up has been provided. The Project Start Date should occur before the Project Completion Date. This will be validated by the system
- k. **Estimated Project Completion Date:** Enter the estimated date when your LEA plans to complete the eligible energy project at this school or site. Please use the

mm/dd/yyyy format to enter the date. A calendar pop-up has been provided for your use. The Project Completion Date should occur after the Project Start Date. This will be validated by the system.

- l. Measure Savings Source:* From the drop-down menu, select the source your LEA used to identify the energy savings and costs for the listed energy measures for the school or site energy project.

Energy Efficiency Narrative Description:

Enter a description of the current condition of the school or site and the overall energy efficiency measures being implemented. If you are also proposing an LEA-owned Photovoltaic (PV) or Power Purchase Agreement (PPA) measure for this school or site, describe the energy efficiency measures previously implemented, and why this school or site is a good candidate for a LEA-owned PV or PPA measure.

Second School/Site Subsection: Benchmarking

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EXPENDITURE PLAN | PROFILE | ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Quick Links: Find Your California Representative

* Site Name: Solar High CDS Code: 000000000000
* Address: * City: Sacramento * Zip: 95833
* Assembly District: * Senate District: * Congressional District:

SITE LEVEL BIR: 4.96

Site: **Benchmarking** Efficiency Measure Photovoltaic Power Purchase Agreements Summary

Reminder: If the school/site is located in a privately-owned leased facility, a Building Owner Certification may be required.

* Square Footage of School/Site (SqFt) * Energy Bill Fiscal Year: --Select--

*If you have more than one electric or gas account number, please separate it with *
Electric Utility: Electric Utility Account #
Gas Utility: Gas Utility Account #

*Please include all meters, renewable production, etc. servicing the school/site. For costs include all utility costs, P&G costs, third party supplier costs.

Average Peak Demand	(kW)	Total Annual Electric Use	(kWh)	Total Annual Electric Charges	\$
On-Site Generation	(kWh)	Total Annual Gas Use	(Therma)	Total Annual Gas Charges	\$
kWh Purchased from Utility	(kWh)	Total Annual Propane Use	(gals)	Total Annual Propane Charges	\$
Total Annual Electric Use	(kWh)	Total Annual Fuel Oil Use	(gals)	Total Annual Fuel Oil Charges	\$

THE FOLLOWING SECTIONS WILL BE CALCULATED AUTOMATICALLY

Energy Use Intensity Calculator

Electricity	Natural Gas	Other Fuels
W/SP	Therma/SP	Gals/SP
kWh/SP	Cost/SP	Cost/SP
Cost/SP		

Energy Costs/SP/Year: Energy Use(Kbtu)/SP/Year:

BACK TO EXP SUMMARY SAVE CURRENT PROGRESS COMPLETE SITE DELETE SCHOOL

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- a. **Reminder: If the school/site is located in a privately-owned leased facility, a Building Owner Certification may be required.** If the LEA is in a privately-owned or leased facility that does not have a separate meter or the lease payment includes the utility cost, submit a certification from the building owner committing to transfer the cost savings from the energy project to the LEA tenant, through a reduced lease payment or other form of monetary reimbursement. If the school/site includes privately-owned leased facilities, please use the drop-down menu and select “included” to indicate the Building Owner Certification is included in the energy expenditure plan.

- b. **Square Footage of School/Site:** Enter the approximate gross square footage of the school or site where the LEA plans to implement this eligible energy project. “Gross square footage” is the area of the school or site within exterior walls less any courtyards or other outdoor areas.
- c. **Energy Bill Fiscal Year:** Enter the fiscal year associated with the energy bills used to complete the Benchmarking section. Please use the drop-down menu to select the fiscal year. The LEA should use the most recent full fiscal year information. A fiscal year is designated as July 1 – June 30 of a certain year.
- d. **Electric Utility:** Enter the name of the electric utility provider for this school or site. Multiple providers may be entered on this line. If the school or site does not have an electric utility, leave this field blank.
- e. **Electric Utility Account #:** Enter the account number(s) of the school or site provided by the electric utility provider. Multiple account numbers may be entered on this line. If the school or site does not have an electric utility, leave this field blank.
- f. **Gas Utility:** Enter the name of the natural gas provider for this school or site. Multiple providers may be entered on this line. If the school or site does not have a gas utility, leave this field blank. (Note: **Do not** enter the name of the propane or fuel oil provider in this field.)
- g. **Gas Utility Account #:** Enter the account number(s) of the school or site provided by the natural gas, propane, or fuel oil utility provider. Multiple account numbers may be entered on this line. If the school or site does not have a gas utility, leave this field blank.

For items (h) to (r) below, please include all meters, renewable production, and so forth servicing the school/site. For costs include all utility costs, PPA costs, and third party supplier costs.

- h. **Average Peak Demand (kW):** Enter the average peak demand of this school or site from the previous fiscal year electric bills. To determine this number, review the previous fiscal year bills for the school or site. (For example, if the energy expenditure plan is submitted in fiscal year 2014-2015, use the bills from 2013-2014.) Calculate this number by averaging the peak demand values. If the school or site has multiple electric meters, then the peak demand of each meter should be summed before averaging. If the utility bills for this school or site do not include electric peak demand information, then leave this field blank.
- i. **On-Site Generation (kWh):** If the school or site has PV on-site electric production, enter the total electric generation from the solar or PV systems at the school or site. If the solar installation is financed by a PPA, enter the purchased kWh from the PPA bills. Also, many LEAs may have school-owned PV systems. In this case, your solar production tracking systems can provide this information. Enter the total annual

- electric usage value on this field. If the school or site does not have a PV system, enter 0.
- j. ***kWh Purchased from Utility (kWh)***: Enter the total electricity consumption of this school or site that is purchased from your local utility provider in the previous fiscal year. Calculate this value by adding the electric usage stated in each of the previous fiscal year electric bills. If the school or site has multiple electric meters, then add the annual electric usage for all meters on the school or site. If the school or site does not use electricity, enter 0 into this field.
 - k. ***Total Annual Electric Use (kWh)***: This is an automatically calculated field from the information entered from items (i) and (j).
 - l. ***Total Annual Gas Use (therms)***: Enter the annual total natural gas usage of the school or site from the previous fiscal year natural gas bills. Calculate this value by adding the natural gas usage stated in each of the previous fiscal year bills. If the school or site has multiple natural gas meters, then add the annual natural gas usage for all meters on the school or site to obtain the correct natural gas usage value to enter on this field. If the school or site does not use natural gas, enter 0.
 - m. ***Total Annual Propane Use (gals)***: Enter the total amount of propane in gallons used by the school or site from the previous fiscal year propane bills. Calculate this value by adding the gallons of propane usage stated in bills stated in the previous fiscal year bills. If the school or site has multiple propane services, then add the annual propane usage for all services to obtain the correct number of gallons to enter in this field. If the school or site does not use propane, enter 0.
 - n. ***Total Annual Fuel Oil Use (gals)***: Enter the total amount of fuel oil used in gallons by the school or site from the previous fiscal year fuel oil bills. Calculate this value by adding the gallons of fuel oil usage stated in the previous fiscal year bills. If the school or site has multiple fuel oil services, then add the annual fuel oil usage for all services to obtain the correct number of gallons to enter on this line. If the school or site does not use fuel oil, enter 0.
 - o. ***Total Annual Electric Charges (\$)***: Enter the annual total electricity cost for the school or site from the previous fiscal year electric bills. A fiscal year is designated as July 1 – June 30 of a certain year. The LEA should use the most recent full fiscal year information. Calculate this value by adding the dollar charges for electricity stated in the previous fiscal year bills. If the school or site has multiple electric meters, then add the dollar charges for electricity for all meters on the school or site to obtain the correct dollar amount to enter on this field. If the school or site does not use electricity, enter 0.
 - p. ***Total Annual Gas Charges (\$)***: Enter the annual total natural gas cost for the school or site from the previous fiscal year natural gas bills. A fiscal year is designated as July 1 – June 30 of a certain year. Calculate this value by adding the dollar charges

for natural gas stated in the previous fiscal year bills. If the school or site has multiple natural gas meters, then add the annual dollar charges for natural gas for all meters on the school or site to obtain the correct dollar amount to enter on this line. If the school or site does not use natural gas, enter 0.

- q. **Total Annual Propane Charges (\$):** Enter the total annual propane cost of the school or site from the previous fiscal year propane bills. The LEA should use the most recent full fiscal year information. A fiscal year is designated as July 1 – June 30 of a certain year. Calculate this value by adding the dollar charges for propane stated in the previous fiscal year bills. If the school or site has multiple propane services, then add the annual dollar charges for propane for all services to obtain the correct dollar amount to enter on this field. If the school or site does not use propane, enter 0.
- r. **Total Annual Fuel Oil Charges (\$):** Enter the total annual fuel oil cost of the school or site from the previous fiscal year fuel oil bills. The LEA should use the most recent full fiscal year information. A fiscal year is designated as July 1 – June 30 of a certain year. Calculate this value by adding the dollar charges for fuel oil stated in the previous fiscal year bills. If the school or site has multiple fuel oil services, then add the annual dollar charges for fuel oil usage for all services to obtain the correct dollar amount to enter on this field. If the school or site does not use fuel oil, enter 0.

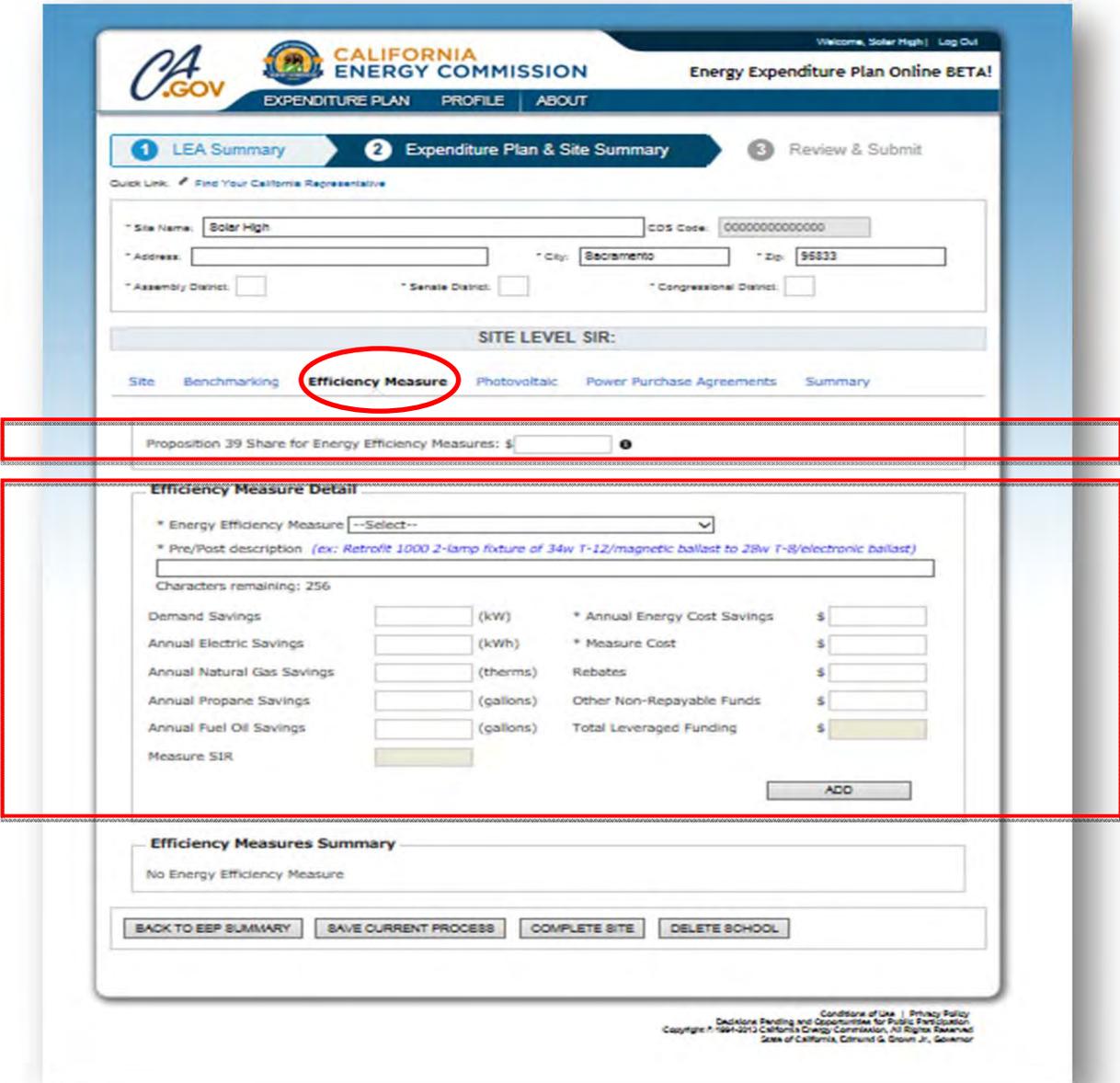
Energy Use Intensity Calculator (All automatically calculated fields):

This section is automatically calculated based on the information entered in the Benchmarking subsection.

- s. **W/SF** (watts per square foot): This signifies the electricity demand intensity of the school or site. The value automatically calculates for you from the *Average Peak Demand* and *Square Footage of School/Site* you provide.
- t. **kWh/SF** (kilowatts per square foot): This signifies the electricity use intensity of the school or site. The value automatically calculates for you from the *Total Annual Electric Use* and *Square Footage of the School/Site* you provide.
- u. **Cost/SF** (dollar cost per square foot): This signifies the electric cost intensity of the school or site. The value automatically calculates for you from the *Total Annual Electric Charges* and *Square Footage of School/Site* you provide.
- v. **Therms/SF** (therms per square foot): This signifies the natural gas use intensity of the school or site. The value automatically calculates for you from the *Total Annual Gas Use* and *Square Footage of School/Site* you provide.
- w. **Cost/SF** (cost of gas per square foot): This signifies the natural gas cost intensity of the school or site. The value automatically calculates for you from the *Total Annual Gas Charges* and *Square Footage of School/Site* you provide.

- x. ***Gals/SF*** (gallons of propane and fuel oil per square foot): This signifies the propane and fuel oil use intensity of the school or site. The value automatically calculates for you from the *Total Annual Propane Use*, *Total Annual Fuel Oil Use*, and *Square Footage of School/Site* you provide.
- y. ***Cost/SF*** (cost of gas per square foot): This signifies the propane and fuel oil cost intensity of the school or site. The value automatically calculates for you from the *Total Annual Propane and Fuel Oil Charges* and *Square Footage of School/Site* you provide.
- z. ***Energy Costs/SF/Year*** (total energy costs per square foot per year): This equals the total energy cost intensity of the school or site. The value automatically calculates for you from the total charges for all energy sources and *Square Footage of School/Site* you provide.
- aa. ***Energy Use (kBtu)/SF/Year*** (total energy usage from all sources per square foot per year): This equals the total source energy use intensity of the school or site. The value automatically calculates from the total energy use and *Square Footage of School/Site* you provide.

Third School/Site Subsection: Efficiency Measure



Note on Access Compliance Requirements: Some energy projects may be required to include accessibility upgrades outside the scope-of-work area. LEAs may include the costs of these accessibility upgrades to their Prop. 39 projects as long as the Savings-to-Investment Ratio (SIR) requirement of 1.05 is met. To help LEAs determine the various requirements for eligible energy measures and possible exemptions, the Division of State Architect (DSA) provides resources and *guidelines* on its website at <http://www.dgs.ca.gov/dsa/Programs/progSustainability/prop39.aspx>.

- a. **Proposition 39 Share for Energy Efficiency Measures (\$):** Enter the total dollar amount of Proposition 39 award funds your LEA proposes to use to implement all energy efficiency measures at this school or site.

Energy Measure Detail:

- b. **Energy Efficiency Measure:** From the drop-down menu, select the type of energy efficiency measure your LEA plans to implement. If the exact energy efficiency measure is not present, please choose the energy efficiency measure from the drop-down menu that most closely resembles the measure to be implemented. Select the efficiency measures carefully because the effective useful lives for each measure may be different. If no measure closely matches, please contact the Proposition 39 hotline for additional assistance.
- c. **Pre/Post Description:** Enter further description of the energy efficiency measure. The maximum number of characters you can enter in this field is 256.
- d. **Demand Savings (kW):** Enter the demand savings from the information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If this energy efficiency measure has no demand savings, leave this field blank.
- e. **Annual Electric Savings (kWh):** Enter the electric savings from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If this energy efficiency measure has no electric savings, leave this field blank.
- f. **Annual Natural Gas Savings (therms):** Enter the annual natural gas savings from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If the energy efficiency measure has no natural gas savings, leave this field blank.
- g. **Annual Propane Savings (gallons):** Enter the annual propane savings from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If the energy efficiency measure has no propane savings, leave this field blank.
- h. **Annual Fuel Oil Savings (gallons):** Enter the annual fuel oil savings from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If the energy efficiency measure has no fuel oil savings, leave this field blank.

- i. **Measure SIR:** This is an automatically calculated field. This reflects the SIR for each energy efficiency measure entered.
- j. **Annual Energy Cost Savings (\$):** Enter the total annual energy cost savings from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this energy efficiency measure. If the energy efficiency measure includes both electricity and fuel cost savings, include the total of these cost savings.
- k. **Measure Cost (\$):** Enter the total cost for implementing this energy efficiency measure at this school or site.
- l. **Rebates (\$):** Enter the total dollar amount of rebates your LEA will apply to this energy efficiency measure. Rebates are considered utility rebates or other incentives that reduce the project cost.
- m. **Other Non-Repayable Funds (\$):** Enter the total dollar amount of other non-repayable funds your LEA will apply to this energy efficiency measure (other than Proposition 39 award funds). Non-repayable funds include bond funding, deferred maintenance, general operation budgets, and other funds used to finance the project. This is funding that does not need to be repaid by the LEA.
- n. **Total Leveraged Funding (\$):** This is an automatically calculated field. This is the total amount of rebates and other non-repayable funds entered.

Once all the information in the Efficiency Measure Detail has been entered, click **ADD** as shown below. Then repeat the entire process until all the energy efficiency measures for this school or site have been entered.

A list of errors will be generated if any required information is not included when the **ADD** button is clicked. These errors will need to be addressed before the energy efficiency measure can be added. **Important Note: Clicking **ADD** does not save the changes to the energy expenditure plan. Please use the **SAVE CURRENT PROCESS** button to manually save changes. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of the added energy efficiency measures.**

It is important to click **ADD** first before clicking the **SAVE CURRENT PROCESS** button or your measures will not be added and saved.

As new energy efficiency measures are entered, each will be listed in the Efficiency Measures Summary (see below.)

Efficiency Measure Detail

* Energy Efficiency Measure:

* Pre/Post description (ex: Retrofit 1000 2-lamp fixture of 34w T-12/magnetic ballast to 28w T-8/electronic ballast)

Install thermostats

Characters remaining: 256

Demand Savings: (kW) * Annual Energy Cost Savings: \$

Annual Electric Savings: (kWh) * Measure Cost: \$

Annual Natural Gas Savings: (therms) Rebates: \$

Annual Propane Savings: (gallons) Other Non-Repayable Funds: \$

Annual Fuel Oil Savings: (gallons) Total Leveraged Funding: \$

Measure SIR:

Efficiency Measures Summary

Pre/Post Description	Annual Cost Energy Saving	Measure Cost	SIR
Install thermostats	\$104.00	\$700.00	1.75
Upgrade T8s to LED	\$1,500.00	\$4,000.00	5.53
Totals:	\$1,604.00	\$4,700.00	

UPDATE - To update or revise information in a measure, select the measure in the Efficiency Measures Summary. Make the necessary revisions in the data, then click **UPDATE**. A list of errors will be generated if any required information is not included when the Update button is clicked. These errors will need to be addressed before the energy efficiency measure can be updated. Once the update has been completed, click **CLOSE**.

DELETE - To delete an efficiency measure that may have been keyed in error, select the measure in the Efficiency Measures Summary, then click **DELETE**.

Updating and deleting energy measures does not automatically save changes to the energy expenditure plan. Be sure to use the **SAVE CURRENT PROCESS** button to manually save changes to the energy expenditure plan. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of all changes that have just been made.

Efficiency Measure Detail

* Energy Efficiency Measure:

* Pre/Post description (ex: Retrofit 1000 2-lamp fixture of 34w T-12/magnetic ballast to 28w T-8/electronic ballast)

Install thermostats

Characters remaining: 256

Demand Savings: (kW) * Annual Energy Cost Savings: \$

Annual Electric Savings: (kWh) * Measure Cost: \$

Annual Natural Gas Savings: (therms) Rebates: \$

Annual Propane Savings: (gallons) Other Non-Repayable Funds: \$

Annual Fuel Oil Savings: (gallons) Total Leveraged Funding: \$

Measure SIR:

Efficiency Measures Summary

Pre/Post Description	Annual Cost Energy Saving	Measure Cost	SIR
Install thermostats	\$104.00	\$700.00	1.75
Upgrade T8s to LED	\$1,500.00	\$4,000.00	5.53
Totals:	\$1,604.00	\$4,700.00	

Fourth School/Site Subsection: Photovoltaic

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EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Quick Link: Find Your California Representative

* Site Name: Solar High CDS Code: 00000000000000

* Address: * City: Sacramento * Zip: 95833

* Assembly District: * Senate District: * Congressional District:

SITE LEVEL SIR: 0.00

Site Benchmarking Efficiency Measures **Photovoltaic** Power Purchase Agreements Summary

Proposition 39 Share for Photovoltaic Measures: \$

Photovoltaic Detail

* Effective Useful Life:

* PV System Size (kW/AC) * Year 1 Energy Cost Savings \$

* Inverter Size (kW) * Measure Cost \$

* Year 1 Production (kWh) Rebates \$

Demand Savings (kW) Other-Non-Repayable Funds \$

Total Leveraged Funding \$

Measure SIR

ADD

Photovoltaic Project Summary

No Photovoltaic Data.

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Note: **This section is to be used only for LEA-owned PV systems.** To complete this section, the LEA will need to obtain information from its measure savings source. An example of a measure saving sources is an energy audit from a solar consultant or vendor, or from the Energy Commission energy savings calculator.

Note on Access Compliance Requirements: Some energy projects may be required to include accessibility upgrades outside the scope-of-work area. LEAs may include the costs of these accessibility upgrades to their Prop. 39 projects as long as the Savings-to-Investment Ratio (SIR) requirement of 1.05 is met. To help LEAs determine the various requirements for eligible energy measures and possible exemptions, the Division of State Architect (DSA)

provides resources and *guidelines* on its website at

<http://www.dgs.ca.gov/dsa/Programs/progSustainability/prop39.aspx>.

- a. **Proposition 39 Share for Photovoltaic Measures (\$):** Enter the total dollar amount of Proposition 39 award funds your LEA proposes to use to implement all photovoltaic measures at this school or site.

Photovoltaic Detail:

- b. **Effective Useful Life:** Select the effective useful life for the LEA's PV system. If 25 years is selected, the LEA must include a written performance warranty from the PV vendor with its supporting documents.
- c. **PV System Size (kW AC):** Enter the alternating current (AC) power rating of the PV system proposed for installation at the school or site. Refer to the *Measure Savings Source* used for this PV measure.
- d. **Inverter Size (kW):** Enter the total inverter capacity in kilowatts of all the inverters associated to the PV measure.
- e. **Year 1 Production (kWh):** Enter the first year energy production of this PV system as projected in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this PV measure. If the PV vendor provides a performance guarantee, enter the annual unit production consistent with your performance guarantee. If you do not have a performance guarantee, calculate your annual kWh production by multiplying 1,500 kWh/kWac by the system size (kWac.) This is a statewide average based on the California Public Utility Commission (CPUC) and the Energy Commission performance evaluations.
- f. **Demand Savings (kW):** Enter the demand savings associated with this PV system from information contained in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this PV measure.
- g. **Measure SIR:** This is an automatically calculated field. This is the savings-to-investment ratio for the PV system measure based on the information you provide.
- h. **Year 1 Energy Cost Savings (\$):** Enter the first year energy cost savings of this PV system as projected in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this PV measure.
- i. **Measure Cost (\$):** Enter the total cost to implement the PV system as projected in the *Measure Savings Source* (for example, energy savings calculator, energy audit, combination of both) your LEA is using for this PV measure.

- j. **Rebates (\$):** Enter the total amount of rebates and grant funds (other than Proposition 39 award funds) that will be applied to the PV measure. Rebates are considered utility rebates or other incentives that reduce the project cost.
- k. **Other Non-Repayable Funds (\$):** Enter the total dollar amount of other non-repayable funds your LEA will apply to this photovoltaic measure (other than Proposition 39 award funds). Non-repayable funds include bond funding, deferred maintenance, general operation budgets, and other funds used to finance the project. This is funding that does not need to be repaid by the LEA.
- l. **Total Leveraged Funding (\$):** This is an automatically calculated field. This is the total amount of rebates and other non-repayable funds entered.

Once all the information in the Photovoltaic Detail has been entered, click **ADD**. Then repeat the entire process until all the PV measures for this school or site have been entered.

A list of errors will be generated if any required information is not included when the **ADD** button is clicked. These errors will need to be addressed before the PV measure can be added. **Important Note: Clicking **ADD** does not save the changes to the energy expenditure plan. Please use the **SAVE CURRENT PROCESS** button to manually save changes. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of the added PV measures.**

It is important to click **ADD first before clicking the **SAVE CURRENT PROCESS** button or your measures will not be added and saved.**

As PV measures are entered, each will be listed in the Photovoltaic Project Summary.

To update or delete a PV measure, follow the same procedures for updating or deleting measures as shown in the Third School/Site Subsection: Efficiency Measure. A list of errors will be generated if any required information is not included when the Update button is clicked. These errors will need to be addressed before the PV measure can be updated.

Updating and deleting PV measures does not automatically save changes to the energy expenditure plan. Be sure to use the **SAVE CURRENT PROCESS button to manually save changes to the energy expenditure plan. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of all changes that have just been made.**

Fifth School/Site Subsection: Power Purchase Agreements

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EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Quick Link: Find Your California Representative

* Site Name: Solar High COS Code: 00000000000000

* Address: * City: Sacramento * Zip: 95833

* Assembly District: * Senate District: * Congressional District:

SITE LEVEL SIR:

Site Benchmarking Efficiency Measure Photovoltaic **Power Purchase Agreements** Summary

Proposition 39 Share for Power Purchase Agreements: \$ 0

Power Purchase Agreement Detail

* PV Size (kW AC) Peak Demand Savings (kW)

* Year 1 PV Production (kWh) * Term of the PPA Agreement

* PV Production as % of LEA School Site Annual Electricity Use (%) * First Year PPA Electricity Cost (\$)

* % Price Discount Offered on Price First Year (%) * PPA Electric Price Escalation (%)

* NPV of Utility Cost Savings \$ * NPV of Payment to PPA Vendor \$ * NPV of Prop 39 Contribution \$

PPA SIR

ADD

Power Purchase Agreements Summary

No Power Purchase Agreements Data.

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Note on Access Compliance Requirements: Some energy projects may be required to include accessibility upgrades outside the scope-of-work area. LEAs may include the costs of these accessibility upgrades to their Prop. 39 projects as long as the Savings-to-Investment Ratio (SIR) requirement of 1.05 is met. To help LEAs determine the various requirements for

eligible energy measures and possible exemptions, the Division of State Architect (DSA) provides resources and *guidelines* on its website at <http://www.dgs.ca.gov/dsa/Programs/progSustainability/prop39.aspx>.

- a. ***Proposition 39 Share for Power Purchase Agreements (\$)***: Enter the total dollar amount of Proposition 39 award funds your LEA proposes to use to implement all power agreement measures at this school or site.

Power Purchase Agreement Detail:

- b. ***PV Size (kW AC)***: Enter the alternating current (AC) power rating of the clean energy generation system proposed at the school or site.
- c. ***Peak Demand Savings (kW)***: Enter the estimated peak demand savings based on the proposed system size and location.
- d. ***Year 1 Production (kWh)***: Enter the estimated annual electricity production in kWh based on the proposed system size and location.
- e. ***Term of the PPA Agreement***: Enter the number of years of the PPA agreement between the PPA vendor and the LEA (for example, 15 years, 20 years, and so forth).
- f. ***PV Production as % of LEA School Site Annual Electricity Use (%)***: Enter the percentage of the first year's (12-month) production estimate to the most recent 12-month annual electricity use of the site by dividing the former by the latter.
- g. ***First Year PPA Electricity Cost (\$)***: This is the electricity cost paid by the LEA to the PPA developer. This is considered to be the measure cost for the LEA to obtain the electricity cost savings from the PPA. Any non-electricity costs paid by the LEA using Proposition 39 funds, such as project development costs, must be included.
- h. ***% Price Discount Offered on Price First Year (%)***: Calculate the weighted average electricity price for last year's utility bills and the weighted average price paid by the LEA for the purchased electricity, then calculate and enter the percentage discount of the electricity price savings. For example, if the weighted average of electricity price is 20 cents and the weighted average price paid by the LEA for the purchased electricity is 16 cents, the difference between the two is 4 cents. To get the percentage price discount, divide 4 cents by 20 cents, and you will get 20 percent. In this example, enter 20 in this field.
- i. ***PPA Electric Price Escalation (%)***: Enter the energy cost escalation rate that was agreed to in the PPA. The escalation rate should not exceed 3 percent nominal.

- j. **NPV of Utility Cost Savings (\$):** Net present value of the difference between the annual electricity cost paid to the utility immediately before and after the PPA agreement.
- k. **NPV of Payment to PPA Vendor (\$):** Net present value of electricity cost paid to the PPA vendor over the term of the PPA agreement.
- l. **NPV of Prop 39 Contribution (\$):** Net present value of the total Proposition 39 contribution to this PPA agreement. Future year contribution shall be discounted to the current year's value.
- m. **PPASIR:** This SIR will be automatically calculated based on the PV production and cost information provided in items j, k, and l above.

Once all the information in the PPA Detail has been entered, click **ADD**. Then repeat the entire process until all the PPA measures for this school or site has been entered.

A list of errors will be generated if any required information is not included when the **ADD** button is clicked. These errors will need to be addressed before the PPA measure can be added.

Important Note: Clicking **ADD does not save the changes to the energy expenditure plan. Please use the **SAVE CURRENT PROCESS** button to manually save changes. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of the added PPA measures.**

It is important to click **ADD first before clicking the **SAVE CURRENT PROCESS** button or your measures will not be added and saved.**

As PPA measures are entered, each will be listed in the Power Purchase Agreements Summary.

To update or delete a PPA measure, follow the same procedures for updating or deleting measures as shown in the Third School/Site Subsection: Efficiency Measure. A list of errors will be generated if any required information is not included when the Update button is clicked. These errors will need to be addressed before the PPA measure can be updated.

Updating and deleting PPA measures does not automatically save changes to the energy expenditure plan. Be sure to use the **SAVE CURRENT PROCESS button to manually save changes to the energy expenditure plan. Leaving the energy expenditure plan without using the **SAVE CURRENT PROCESS** button will result in the loss of all changes that have just been made.**

Sixth Subsection: Summary

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EXPENDITURE PLAN PROFILE ABOUT Energy Expenditure Plan Online BETA!

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Quick Link: Find Your California Representative

* Site Name: Solar High CDS Code: 00000000000000
* Address: * City: Sacramento * Zip: 95833
* Assembly District: * Senate District: * Congressional District:

SITE LEVEL SIR: 0.00

Site Benchmarking Efficiency Measure Photovoltaic Power Purchase Agreements **Summary**

ALL INFORMATION IN THE SUMMARY TAB IS CALCULATED AUTOMATICALLY.

Savings Summary

Total Demand Savings	0.00	Total Annual Fuel Oil Savings	0.00
Total Annual Electric Savings	0.00	Total Annual Cost Savings	\$ 0.00
Total Annual Natural Gas Savings	0.00	Total Annual Propane Savings	0.00

Cost & Rebates

Total Project Cost	\$ 0.00	Total Prop 39 Share	\$ 0.00
Total Cost Paid Under PPA	\$ 0.00		
Total Rebates	\$ 0.00	Total Other Non-Repayable Funds	\$ 0.00

BACK TO EEP SUMMARY SAVE CURRENT PROCESS COMPLETE SITE DELETE SCHOOL

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All information in the Summary Tab is calculated automatically based on the information keyed into the energy expenditure plan.

Savings Summary:

- a. **Total Demand Savings:** This field is automatically calculated to reflect the total demand savings for the energy efficiency measures and PV system measures proposed for the school or site.
- b. **Total Annual Electric Savings:** This field is automatically calculated to reflect the total electric savings for the energy efficiency measures and PV system measures proposed for the school or site.
- c. **Total Annual Natural Gas Savings:** This field is automatically calculated to reflect the total natural gas savings for these energy efficiency measures proposed for the school or site.
- d. **Total Annual Fuel Oil Savings:** This field is automatically calculated to reflect the total fuel oil savings for these energy efficiency measures proposed for the school or site.
- e. **Total Annual Cost Savings:** This field is automatically calculated to reflect the total energy cost savings associated with energy efficiency measures, both electricity and fuel, and PV system measures proposed for the school or site.
- f. **Total Annual Propane Savings:** This field is automatically calculated to reflect the total propane savings for these energy efficiency measures proposed for the school or site.

Cost & Rebates:

- g. **Total Project Cost:** The total project cost of energy efficiency measures and PV measures proposed for the school or site. This field is automatically calculated based on information provided in the input fields.
- h. **Total Prop 39 Share:** This amount is automatically calculated to reflect the total amount of Proposition 39 award funds to be used for the energy measures proposed to be implemented for the energy project at this school or site.
- i. **Total Cost Paid Under PPA:** This amount is automatically calculated to reflect the total amount spent under PPAs applicable to the school or site.
- j. **Total Rebates:** This is automatically calculated to reflect the total amount of rebates for energy efficiency measures and PV measures proposed for the school or site based on the information you provide in the input fields.
- k. **Total Other Non-Repayable Funds:** This is automatically calculated to reflect the total amount of other non-repayable funds for energy efficiency measures and PV

measures proposed for the school or site based on the information you provide in the input fields.

ALL INFORMATION IN THE SUMMARY TAB IS CALCULATED AUTOMATICALLY.

Savings Summary

Total Demand Savings	<input type="text" value="0.00"/>	Total Annual Fuel Oil Savings	<input type="text" value="0.00"/>
Total Annual Electric Savings	<input type="text" value="0.00"/>	Total Annual Cost Savings	\$ <input type="text" value="0.00"/>
Total Annual Natural Gas Savings	<input type="text" value="0.00"/>	Total Annual Propane Savings	<input type="text" value="0.00"/>

Cost & Rebates

Total Project Cost	\$ <input type="text" value="0.00"/>	Total Prop 39 Share	\$ <input type="text" value="0.00"/>
Total Cost Paid Under PPA	\$ <input type="text" value="0.00"/>		
Total Rebates	\$ <input type="text" value="0.00"/>	Total Other Non-Repayable Funds	\$ <input type="text" value="0.00"/>

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Once you have entered all the information for the school/site, click on the **COMPLETE SITE** button. A list of errors will be generated if any required information is not included when the **COMPLETE SITE** button is clicked. These errors will need to be addressed before the site can be completed. If you need to enter information for additional schools/sites, use the same procedure as listed in the [Schools/Sites](#) section in this handbook.

Uploading Supporting Documents

CA.GOV CALIFORNIA ENERGY COMMISSION Welcome, Solar High | Log Out
EXPENDITURE PLAN PROFILE ABOUT
1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit
LEA PROJECT SIR: 0.00
LEA Name: Solar High LEA Code: 00000000000000 Grant Amount Request: \$0.00
Energy Planning & Training Schools/Sites Job Creation Certifications
Please type the school name: *Press the down arrow key on your keyboard to see a complete list of available schools.
Click here to search... ADD
No schools/sites associated with this plan.
Supporting Documents
Select File Please select file(s) to upload.
Maximum file size: ~50 MB
Allowed file type: zip, pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
BACK TO LEA SUMMARY SAVE CURRENT PROCESS REVIEW EEP
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Once you have entered all the information for all schools/sites, you must upload all supporting documentation to validate all energy savings calculations in the Supporting Documents section. Appendix A lists examples of supporting documents that need to be uploaded with your energy expenditure plan.

You may upload supporting documents in two ways. Depending on what browser you are using, you may upload files by dragging and dropping files into the Supporting Documents section or clicking on the **Select File** button. Below are the two ways you may upload your supporting documents:

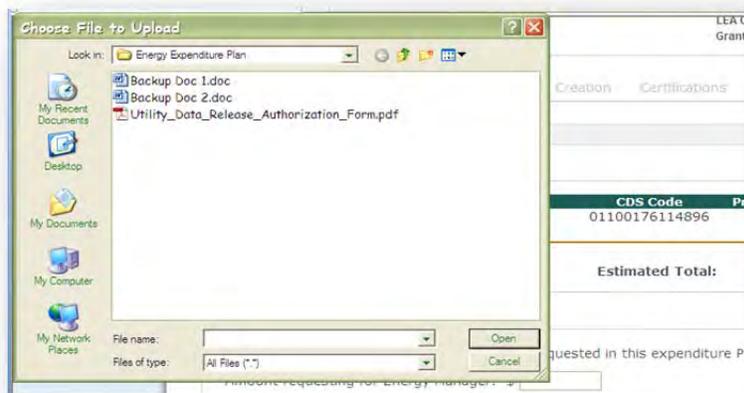
Drag and Drop Files – Drag and drop files simply by opening the folder on your computer that contains your energy expenditure plan documents and dragging and dropping the files into Energy Expenditure Plan Online where it says “Drop files here.”



Select Files – The following is the process to upload files by selecting files from your computer.



Click **Select File**



Select the file you need to upload. Then click **Open**.

Your files will appear in the system as shown below. Note that once the files are in Energy Expenditure Plan Online, you will not be able to change them. If you need to make changes to any of the files, make revisions to the files in your computer and then re-upload those revised files. Note: Newer files with the same file name as the one in the upload screen will automatically overwrite the older file.



Click the **Upload** button to upload the supporting documents. Click the **Remove** button if you do not want to upload the selected file.



Once a file has been uploaded, you will still have the option to delete that file. Click on the **DELETE** button to delete files that have already been uploaded, but you do not want to submit.

Third Section: Job Creation

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EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

LEA PROJECT SIR: 4.96

LEA Name: Solar High LEA Code: 00000000000000 Grant Amount Request: \$0.00

Energy Planning & Training Schools/Sites **Job Creation** Certifications

Apprenticeship Information Budget Estimated Apprenticeship Job-Years Created

Apprenticeships \$ 0

Please list any state-certified apprenticeship programs being used:

--Select-- Will this project be subject to a community benefits agreement, community workforce agreement, or other mechanism that defines project co-benefits?

Add Other Trainee Position to EEP

Other Trainee Position Title Estimated Other Trainee Jobs Created

ADD

Other Trainee Position(s)

No Other Trainee Position Data.

THE FOLLOWING SECTIONS WILL BE CALCULATED AUTOMATICALLY

Type of Project	Budget	Estimated Direct Job-Years Created
Energy Efficiency	\$ <input type="text"/> 0.00	<input type="text"/> 0
Renewable Energy	\$ <input type="text"/> 0.00	<input type="text"/> 0
Clean Advanced Distributed Energy	\$ <input type="text"/>	<input type="text"/> 0
Total:		<input type="text"/> 0

BACK TO LEA SUMMARY SAVE CURRENT PROCESS REVIEW EEP

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Once you have entered all of the school/site information and uploaded your supporting documentation, you are now ready to complete your energy expenditure plan. Click on the **Job Creation** section and enter the following:

- a. **Apprenticeships – Budget:** Enter the estimated Proposition 39 funds your LEA plans to allocate to apprenticeship positions under this energy expenditure plan. If unknown, leave blank.
- b. **Estimated Apprenticeship Job-Years Created:** This is an automatically calculated field based on the budget you entered.
- c. **Please list any state-certified apprenticeship programs being used:** This field is for the LEA to list all state-certified apprenticeship programs being used to implement energy efficiency measures. If unknown, leave blank.
- d. **Will this project be subject to a community benefits agreement, community workforce agreement, or other mechanism that defines project co-benefits?** This is a drop down menu. Please select “yes” on the drop down menu to indicate that the project is subject to community benefits agreements, community workforce agreements, or other mechanisms that define project co-benefits. If unknown, select “no.”

Add Other Trainee Position to EEP

- e. **Other Trainee Position Title:** Enter the titles of trainee positions your LEA will use in addition to apprenticeship positions. If unknown, leave blank.
- f. **Estimated Other Trainee Jobs Created:** Enter the number of Other Trainee Jobs created for each trainee classification. If unknown, leave blank. Then click **ADD**.
- g. **Other Trainee Position(s):** This field is automatically populated by the information entered in the “Add Other Trainee Position to EEP” field below.
 - To edit information that has been entered, click the **Edit** link and make the necessary revisions to the title and/or estimated jobs created. Then, click **Update**. To cancel an update, click **Cancel**.
 - To delete information already entered, click **Delete** to delete. A pop-up saying “Are you sure you want to delete this position?” will appear. Click **OK** or **Cancel** whichever is appropriate.

The following are automatically calculated fields based on information entered in the Schools/Site section:

- h. **Energy Efficiency – Budget:** This is an automatically calculated field. This is the sum of the amounts entered in the Proposition 39 Share for Energy Efficiency Measures in the Efficiency Measure section from all school/sites you entered in the energy expenditure plan.

- i. **Renewable Energy – Budget:** This is an automatically calculated field. This is the sum of the amounts entered in the Proposition 39 Share for Photovoltaic Measures fields in the Photovoltaic section and the Proposition 39 Share for Power Purchase Agreements fields in the Power Purchase Agreements section for all school/sites.
- j. **Clean Advanced Distributed Energy – Budget:** This is an automatically calculated field. This is the estimated Proposition 39 award funds allocated to Clean Advanced Distributed Energy measures under this Expenditure Plan.
- k. **Estimated Direct Job-Years Created:** These fields will automatically calculate from the budgeted amounts in each Type of Project category.

Fourth Section: Certifications

The screenshot displays the 'Energy Expenditure Plan Online BETA!' interface. At the top, it shows the 'CA.GOV' logo and the 'CALIFORNIA ENERGY COMMISSION' header. The main navigation includes 'EXPENDITURE PLAN', 'PROFILE', and 'ABOUT'. A progress bar indicates the current step is '2 Expenditure Plan & Site Summary'. Below this, the 'LEA PROJECT SIR: 0.00' is displayed. The 'LEA Name: Solar High' and 'LEA Code: 00000000000000' are shown, along with a 'Grant Amount Request: \$0.00'. The 'Certifications' section is highlighted with a red circle and contains the following items:

- The LEA followed the Proposition 39 Guidelines regarding eligible energy project prioritization considerations.
- The LEA followed the guidelines regarding sequencing of facility improvements.
- The LEA commits to use the funds for the eligible energy project(s) approved in its energy expenditure plan.
- The LEA commits the information included in the application is true and correct based to the best of the LEA's knowledge.
- The LEA commits that all California Environmental Quality Act (CEQA) requirements are completed.
- The LEA will obtain OGA project approval as applicable pursuant to California Code of Regulations, Title 24.
- The LEA acknowledges that the expenditures are subject to financial audit requirements (Public Resource Code Section 26206(s) and 26240(g)).
- The LEA commits to complying with all reporting requirements.

Below the list, a red box highlights the signature and date fields:

Reminder: Please remember to include the signed Utility Data Release Authorization Form for your utility provider to release data to the Energy Commission

TYPE Name of Authorized Representative: /s/ Date:

At the bottom, there are three buttons: 'BACK TO LEA SUMMARY', 'SAVE CURRENT PROCESS', and 'REVIEW EEP'. The footer contains the 'Conditions of Use | Privacy Policy' and 'Disclaimer Pending and Opportunities for Public Participation'.

Note: This section includes all certifications each LEA must certify in order to submit an energy expenditure plan. Each certification has a checkbox. Click on the checkbox to confirm acceptance of each certification. The LEA must certify to *all* the certifications to receive their Proposition 39 award.

- a. *The LEA followed the Proposition 39 Guidelines regarding eligible energy project prioritization considerations.* This certifies that your LEA followed the project prioritization guidelines (11 factors listed in the *2015 Guidelines*, Step 3, pages 18-19) when analyzing energy projects included in this energy expenditure plan.
- b. *The LEA followed the guidelines regarding sequencing of facility improvements.* This certifies that your LEA followed the sequencing guidelines (*2015 Guidelines*, Step 4, page 20) when analyzing eligible energy projects included in this energy expenditure plan.
- c. *The LEA commits to use the funds for the eligible energy project(s) approved in its energy expenditure plans.* This certifies that your LEA will commit to using the funds received for eligible energy projects approved in this energy expenditure plan.
- d. *The LEA commits that the information included in the application is true and correct based to the best of the LEA's knowledge.* This certifies that your LEA has determined the provided information in this energy expenditure plan and supporting documents are accurate to the best of the LEA's knowledge.
- e. *The LEA commits that all California Environmental Quality Act (CEQA) requirements are completed.* This certifies that the LEA has determined the eligible energy projects proposed in this energy expenditure plan meet CEQA requirements.
- f. *The LEA will obtain DSA project approval as applicable pursuant to California Code Regulations, Title 24.* This certifies that all projects included in this energy expenditure plan meet DSA requirements, as applicable. DSA energy project construction compliance resources are found starting on page 33 of the *2015 Guidelines*.
- g. *The LEA acknowledges that the expenditures are subject to financial audit requirements (Public Resources Code Section 26206(e) and 26250(g)).* This indicates the LEA understands that expenditures are subject to financial audit requirements.
- h. *The LEA commits to complying with all reporting requirements.* This indicates the LEA will comply with Proposition 39 reporting requirements in Step 8 of the *2015 Guidelines*, page 29-32.
- i. ***TYPE Name of Authorized Representative: /s/:*** Type the name of the LEA authorized representative in the field provided. This should be the same authorized representative entered at the start of the energy expenditure plan (see Create a New Energy Expenditure Plan.) The Energy Commission accepts this name entry as an electronic signature. **The authorized representative is an LEA employee with authority to execute the energy expenditure plan and the Utility Data Release Authorization Form, and to direct or delegate the implementation of the eligible energy projects on behalf of the LEA. This field is case-sensitive so the name typed here must exactly match the Authorized Representative specified in the Energy Planning & Training tab.**

- j. **Date:** Enter the date the energy expenditure plan is signed by the LEA authorized representative. There is a calendar pop-up that the LEA may use to fill in the date.

Review and Submit Your Energy Expenditure Plan

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EXPENDITURE PLAN PROFILE ABOUT

1 LEA Summary 2 Expenditure Plan & Site Summary 3 **Review & Submit**

California Energy Commission Proposition 53 Program
Expenditure Plan Summary

Expenditure Plan Summary
Fiscal Year: 2015-16 Expenditure Plan Submitted Option: Multiple-Year (bundled) Award Expenditure Plan
Total Award Allocation (Maximum): \$300,000.00 Credit Amount Requested: \$300,000.00 Bundle Size: 1,24

Application Information
Local Education Agency (LEA) Name: Santa Ana Unified School District
LEA CDS Code: 208810000000
Mailing Address: 1801 E. Chestnut Avenue
City: Santa Ana
Zip Code: 92701
LEA Authorized Representative: es@sfed.usd.net Phone: (714) 423-4123
Email: es@sfed.usd.net
Project Manager: es@sfed.usd.net Phone: (714) 412-3412
Email: es@sfed.usd.net

Energy Planning/Investment Information (only available for fiscal year 2013-2014 award)
Did you request Energy Training Funds?
Budget for Energy Survey and Energy Audit: Amount Spent for Energy Survey and Energy Audit:
Budget for Proposition 53 Program Assistance: Amount Spent for Proposition 53 Program Assistance:
Budget for Energy Manager: Amount Spent for Energy Manager:
Budget for Training: Amount Spent for Training:
Total:

Energy Manager and Training
Are you hiring an Energy Manager with funds requested in this Expenditure Plan? Amount requesting for Energy Manager:
Are you using Proposition 53 funds for energy related training costs? Amount requesting for Training:

Self-Certifications
 The LEA followed the Proposition 53 Guidelines regarding eligible energy project prioritization considerations.
 The LEA followed the guidelines regarding sequencing of facility improvements.
 The LEA commits to use the funds for the eligible energy projects approved in its energy expenditure plan.
 The LEA certifies the information included in the application is true and correct based on the best of the LEA's knowledge.
 The LEA certifies that all California Environmental Quality Act (CEQA) requirements are completed.
 The LEA will obtain DSA project approval as applicable pursuant to California Code of Regulations, Title 24.
 The LEA acknowledges that the expenditures are subject to financial audit requirements (Public Resources Code Section 26200(x) and 26240(g)).
 The LEA certifies to complying with all reporting requirements.
Reminder: Please remember to include the signed Utility Data Release Authorization Form for your utility provider to release data to the Energy Commission.
I/We Name of Authorized Representative: es@sfed.usd.net Date: 2/10/2015

Summary of Schools/Sites
List all schools/sites where Proposition 53 funds from this expenditure plan will be used. Each school/site listed must have a Expenditure Plan Project Summary Form 10 completed and attached.

Address	CDS Code	Total Project Cost	Proposition 53 Share
es@sfed	208810000000	\$300,000.00	\$300,000.00
Estimated Total:		\$300,000.00	\$300,000.00

SUBMIT | [BACK TO EEP SUMMARY](#)

Decision Review and Complaint for Public Participation
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State of California, Governor & Cabinet & Board of Governors

Once you have completed your energy expenditure plan online, you may review and submit your energy expenditure plan package. Click on the **REVIEW EEP** button and this will allow you to see a summary of the general information (the summary will look like the old Form A). See above for a sample of what the review screen looks like. A list of errors will be generated if any required information is not included when the **REVIEW EEP** button is clicked. These errors must be addressed before the energy expenditure plan can be reviewed.

Finally, once the energy expenditure plan has been completed and reviewed, the LEA must click the **SUBMIT** button to submit the energy expenditure plan to the Energy Commission.

Within a few days of receipt, your energy expenditure plan is assigned to an Energy Commission Project Manager who will contact, via e-mail, the specified authorized representative and specified project manager listed in the energy expenditure plan and send a receipt confirmation.

CHAPTER 3:

Instructions for the Utility Data Release Authorization and Facility and Service Account Information Forms

Purpose and Background

Public Resources Code 26240(a) requires LEAs receiving Proposition 39 fund awards to authorize their electric and gas utilities to release past and ongoing energy usage and billing record data to the Energy Commission. The Utility Data Release Authorization Form (CEC-12) is used by the LEA to authorize and instruct its electric and/or gas utility/utilities to share the historical energy usage and billing data for the fiscal year (July 1- June 30) immediately preceding the submission of the LEA's first energy expenditure plan. This form also authorizes and instructs the utility/utilities to provide this data through the fiscal year ending in 2023. This data will be transmitted to the Energy Commission annually by December 31. In addition to the Utility Data Release Authorization, the Energy Commission provides a Facility and Service Account Information Form (CEC-24) to assist in the utilities' identification of the proper data for each LEA.

Instructions

The Energy Commission's Utility Data Release Authorization Form, titled AUTHORIZATION TO RELEASE CUSTOMER INFORMATION TO THE CALIFORNIA ENERGY COMMISSION ON A CUSTOMER'S BEHALF FOR PROPOSITION 39 IMPLEMENTATION ONLY (CEC-12), can be downloaded from the Energy Commission's Proposition 39 webpage at <http://www.energy.ca.gov/efficiency/proposition39/>. To avoid delays in processing their first energy expenditure plan, LEAs should ensure that they are using the most recent version of the Energy Commission's Utility Data Release Authorization and Facility and Service Account Information Forms.

The Energy Commission cannot approve an LEA's first energy expenditure plan if it does not include a completed and signed Utility Data Release Authorization Form for every utility that provides it with either electricity or natural gas.

In addition, the LEA must complete a Facility and Service Account Information Form, titled "LIST OF EVERY ELECTRIC AND GAS ACCOUNT FOR ALL SCHOOLS AND FACILITIES UNDER A CUSTOMER'S JURISDICTION" (CEC-24), identifying all of the schools or facilities under the LEA. Those LEAs that have submitted a Utility Data Release Authorization Form prior to March 1, 2015, will not be required to submit a Facility and Service Account Information Form unless there is a change in the number of facilities under their jurisdiction.

If any changes to the number of facilities under its jurisdiction have occurred since the last energy expenditure plan was submitted, it is the LEA's responsibility to provide an updated Facility and Service Account Information Form along with a subsequent energy expenditure plan (e.g. facilities have closed or new facilities have opened.)

LEAs must complete the Facility and Service Account Information Form using a computer to enter the required information into the document; hand written information cannot be accepted. If a submitted Facility and Service Account Information Form contains incomplete or inaccurate information, approval of that LEA's energy expenditure plan may be delayed.

A scanned copy of each completed and signed Utility Data Release Authorization Form should be uploaded as a part of each LEA's first energy expenditure plan. The Facility and Service Account Information Form should be also uploaded as a part of the first energy expenditure plan. The original Utility Data Release Authorization and a copy of the Facility and Service Account Information Form should be forwarded to the applicable utility/utilities.

The Utility Data Release Authorization Form

The top four lines of the Utility Data Release Authorization Form (CEC-12) contain the following information fields:

- ***Name and Title:*** Enter the name and the title of your LEA's authorized representative. This person should be the same individual who is identified as the authorized representative in the Energy Expenditure Plan Online application. Applicant Information (for example, George Smith, Superintendent).
- ***Name of Customer of Record:*** Enter the name of the utility customer as it appears on the bills from this utility. This may be the name of the LEA, an individual, a school, or even another identifier (for example, XYZ Middle School).
- ***Mailing Address, City, State, and Zip Code:*** Enter the appropriate mailing address at which the LEA or customer of record receives correspondence from the applicable utility.
- ***Name of Utility:*** Enter the name of your Utility (for example, Roseville Electric).

The first line of the final paragraph contains a space for the customer name. Insert the name of your LEA's authorized representative. This will be the same name inserted in the first line of the form.

The bottom of the form contains five information fields to complete:

- ***Authorized Customer Signature:*** The authorized representative must sign (wet signature) the original Utility Data Release Authorization Form to forward to each utility.
- ***Telephone Number:*** Insert the telephone number of the authorized representative.
- ***Day:*** Insert the day of the signature, (for example, 3rd.)
- ***Month and Year:*** Enter the month and year of the signature.
- ***City and State Where Executed:*** Enter the name of the city and state where the authorization is signed.

Facility and Service Account Information Form

In addition to the Utility Data Release Authorization Form, the Facility and Service Account Information Form provides a standard format for the LEA to provide information to assist the Utility identify account information and provide the Energy Commission required energy use and billing data. Incomplete and/or inaccurate submission of the information in the Facility and Service Account Information Form will result in a delay of the approval of the energy expenditure plan. This must be done for ALL schools/sites/meters within an LEA. Using a computer, LEAs should enter the following information into the Facility and Service Account Information Form:

- **School/Facility Name:** List the name used by the CDE to identify the school or facility. A list of required facilities can be obtained by entering the first seven digits of your CDS code into the "CDS Code" field and selecting the "Search" button on the page found at: <http://www.cde.ca.gov/re/sd>.
- **CDS Number:** List the 14-digit County District School number used by CDE to identify the school or facility. This number should be entered with no dashes or spaces.
- **Electric Service Account Number:** List the account number for the electric service associated with this school or facility.
- **Natural Gas Service Account Number:** List the account number for the natural gas service associated with this school or facility.
- **Service Address:** List the number and street name where the utility service is received.
- **City:** List the city where the utility service is received.
- **Zip+4:** List the zip code +4 digits where the utility service is received. If you are unsure of your zip +4 digits, refer to https://tools.usps.com/go/ZipLookupAction_input to obtain the correct digits to enter.
- **Contact Phone:** Enter the phone number at which either the facility manager or the person responsible for paying the utility bill(s) can be contacted.

CHAPTER 4:

Instructions for the Energy Savings Calculators

Purpose and Background

The Energy Commission provides the energy savings calculators to assist LEAs with their simple energy efficiency projects. These tools calculate energy use intensities (EUI) for benchmarking, energy savings, energy cost savings, simple payback, and savings-to-investment ratios (SIR). Designed in Microsoft Excel®, the calculators may be used by LEAs to implement simple projects without a professional energy survey or audit.

LEAs may choose to use these energy savings calculators to estimate the energy savings of one or various energy efficiency measures. If LEAs decide to use these energy savings calculators for the simple measures listed below, they must also include:

- A description of the proposed energy efficiency measures and the buildings or facilities that will be improved by these measures.
- A description of the existing energy-using equipment (that is, type, age of equipment, size, number of units, operating hours and so forth).

All assumptions and formulas used in the calculators comply with the *2015 Guidelines*. If the *2015 Guidelines* are revised in the future, the Energy Commission will revise the calculators accordingly. Always use the most current version of the calculators.

The calculators include 10 simple lighting measures; 8 heating, ventilation, and air-conditioning (HVAC) and mechanical measures; 2 plug-load measures; and 1 simple PV project. In addition, a calculator for energy use intensity is included to assist LEAs to benchmark their schools.

If an LEA opts to use the Energy Commission energy savings calculator for any measure listed below, the LEA must submit the entire calculator tool even if only one measure is used. An LEA must use one entire calculator tool for each school or site. Do not combine measures from different schools or sites in one calculator tool.

Energy savings is calculated based on the energy cost in the benchmarking tab. Therefore, when an LEA opts to use this energy savings calculator to quantify their savings, they must complete the benchmarking tab.

The LEA is responsible for using the latest version of the Energy Commission energy savings calculator.

The energy efficiency measures are listed in four categories as follows:

Lighting Energy Efficiency Measures:

- | | |
|-------|--|
| ECM 1 | Replace incandescent light with compact fluorescent |
| ECM 2 | Replace incandescent light with light-emitting diode (LED) light |

- ECM 3 & 4 Convert incandescent/CFL exit sign to LED exit sign
- ECM 5 & 6 Convert T12 fluorescent to T8 with electronic ballast or LED lamps
- ECM 6A Convert 4 foot 32 watt T8 fluorescent fixture to LED lamps
- ECM 7 Replace 32 watt T8 lamps with 28 watt T8 lamps
- ECM 8 & 9 Replace exterior mercury vapor/HPS with LED/induction lights
- ECM 10 Install occupancy control for intermittently occupied rooms

HVAC/Mechanical Efficiency Measures:

- ECM 11 Replace old packaged/split HVAC unit (up to 65KBtu) with high-efficiency HVAC
- ECM 12 Replace old heat pump (up to 65 kBtu) with high-efficiency heat pump
- ECM 13A Replace boiler with high-efficiency condensing boiler
- ECM 13B Replace furnace with high-efficiency condensing furnace
- ECM 14 Seal existing leaky duct
- ECM 15 Install variable speed drive for pumps and fans
- ECM 16 Replace manual thermostat with programmable thermostat
- ECM 17 Replace old motor with premium efficiency motor
- ECM 18 Replace storage water heater with gas-fired tankless water heater

Plug-Load Efficiency Measures:

- ECM 19 Install smart strip/PC management to control computers/printers
- ECM 20 Install vending machine occupancy control

Simple Photovoltaic (PV) Self-Generation Project

- ECM 21 Install PV System

The assumptions and energy impacts used in the calculator for lighting and HVAC measures were derived from energy impact data supplied by the Database for Energy Efficient Resources (DEER). In many cases, the baseline energy information was based on performance mapping conducted by each investor-owned utility (IOU). Many factors were considered in this baseline performance mapping, including building type, building size, building vintage, equipment efficiency, operating hours, zip code, and climate zone for Education-primary schools, Education-secondary schools, and Education-portable classroom buildings.

A Note About the Energy Savings Calculators, Version 6:

The energy savings calculator, version 6, uses the average unit savings from the DEER database. The unit savings from DEER database is a statewide or utility service area average for school buildings. In addition, these unit energy savings are taken from the equipment replacement database. The unit energy savings may be high for some schools. In some cases, when an LEA uses the energy savings calculators for all 21 ECMs, the total energy and cost savings may

exceed 80 – 90 percent of total energy use or energy cost at the school site. When this situation happens, the calculator will adjust the energy savings down to 50 percent of each end-use group.

Based on average school energy end use profile, each end use technology is expected to use a certain percentage of the total school site baseline energy use. Lighting technologies are estimated to use 30 percent of the school baseline energy use, HVAC equipment is estimated to use 50 percent of the school site baseline energy use, and the plug loads are estimated to use 10 percent of the school site baseline energy use. The remaining 10 percent of the school site baseline energy use is estimated for miscellaneous use and weather variation. The detail of the adjustment to each end use group is explained in the following sections.

Lighting Measures Energy Savings Adjustment:

The energy savings calculator will sum the energy savings from all proposed lighting ECMs included in the energy savings calculator and compare the total to the estimated energy use for lighting technologies (30 percent of total site baseline energy use.) When lighting ECM savings exceeds 50 percent of the estimated energy use allocated to lighting technologies, the kWh energy savings associated with lighting ECMs will be prorated down by a calculated ratio. For example, if total lighting ECM savings is 80 percent of the lighting technology site kWh use, the energy savings for each lighting measure will be adjusted from 80 percent to 50 percent by multiplying an adjustment factor of 50 percent/80 percent.

If savings of lighting ECMs are lower than 50 percent of estimated energy use for lighting technologies (30 percent of the total site baseline energy use), no adjustment will be made. If lighting ECM energy savings are higher than 50 percent of estimated energy use for lighting technologies, the total kWh savings will be capped at 50 percent of estimated energy use for lighting technologies.

HVAC Measures Energy Savings Adjustment:

The energy savings calculator will sum the energy savings from all proposed HVAC ECMs included in the energy savings calculator and compare the total to the estimated energy use for HVAC technologies (50 percent of total site baseline energy use). When HVAC ECM savings exceeds 50 percent of the estimated energy use allocated to HVAC technologies, the kWh energy savings associated with HVAC ECMs will be prorated down by a calculated ratio. For example, if total HVAC ECM savings is 80 percent of the HVAC technology site kWh use, the energy savings for each lighting measure will be adjusted from 80 percent to 50 percent by multiplying an adjustment factor of 50 percent/80 percent.

If savings of HVAC ECMs are lower than 50 percent of estimated energy use for HVAC technologies (50 percent of the total site baseline energy use), no adjustment will be made. If HVAC ECM energy savings are higher than 50 percent of estimated energy use for HVAC

technologies, the total kWh savings will be capped at 50 percent of estimated energy use for HVAC technologies.

Plug Load Measure Energy Savings Adjustment:

The energy savings calculator will sum the energy savings from all proposed plug load ECMs included in the energy savings calculator and compare the total to the estimated energy use for plug load technologies (10 percent of total site baseline energy use.) When these plug load ECM savings exceeds 50 percent of the estimated energy use allocated to plug load technologies, the kWh energy savings associated with plug load ECMs will be prorated down by a calculated ratio. For example, if total plug load ECM savings are 80 percent of the plug load technology site kWh use, the energy savings for each lighting measure will be adjusted from 80 percent to 50 percent by multiplying an adjustment factor of 50 percent/80 percent.

If savings of plug load ECMs are lower than 50 percent of estimated energy use for plug load technologies (10 percent of the total site baseline energy use), no adjustment will be made. If plug load ECM energy savings are higher than 50 percent of estimated energy use for plug load technologies, the total kWh savings will be capped at 50 percent of estimated energy use for plug load technologies.

The following tables are the Energy Summary table before and after the energy saving data was adjusted by a factor of 5/8.

Table 1: Energy Savings Summary		
This project saves	47.2	kW peak demand
		kWh electricity
and	39,805.6	use.
and		- therms natural gas
		gallons
		of
or	(0.1)	Propane
		energy cost
or	\$5,071.2	annually
Simple Payback is	207.0	years.
Saving to		
Investment Ratio	0.66	

Table 2: Adjusted Energy Savings Summary		
This project saves	29.5	kW peak demand
		kWh electricity
and	24,878	use.
and		- therms natural gas
		gallons
		of
or	-0.1	Propane
		energy cost
or	\$3,170	annually.
Simple Payback is	129.4	years.
Saving to		
Investment Ratio	0.42	

Step 1: Benchmarking Calculator

Benchmarking helps LEAs determine how well schools or sites are performing in terms of energy efficiency. Benchmarks can quickly identify schools or sites with the greatest potential for energy savings based on energy usage.

The purpose of the benchmarking calculator is to produce the EUI for electricity, natural gas, liquid fuel, and cost per square foot per year for each school or site. LEAs may use this calculator to compute EUI for benchmarking every school or site to identify and likely prioritize schools with the most energy savings potential.

Use the EUI calculator to benchmark electricity, natural gas, liquid fuels usage, and cost per square foot per year by entering the annual energy use data. Your LEA can perform the EUI calculation for each school or site and select the best candidate locations for energy efficiency retrofits. The calculator can also be used to calculate the average cost of electricity, natural gas, and liquid fuel for energy efficiency measure evaluations.

Based on information you enter for your LEA, the following tables are automatically produced:

1. Energy Use Intensity Calculator Table
2. Average Cost Table

Values generated from the Benchmarking calculator may be used to complete the Energy Expenditure Plan Online application.

Step 2: Energy Savings Calculator

The energy savings calculator is separated into four category tabs:

1. Lighting measure calculators
2. HVAC/mechanical measure calculators
3. Plug-load measure calculators
4. Simple PV calculator.

Each calculator contains a list of questions for the LEA. Most of the questions can be answered by school maintenance staff. Once the responses are filled in, the annual savings and cost savings, simple payback, and SIR are automatically calculated.

Based on the information your LEA provides, the following tables are automatically produced and appear to the right of the input calculators:

1. Energy Savings Summary – a set of automatically calculated fields that show savings in peak demand, energy use, therms, gallons of propane and fuel oil, energy cost savings, simple payback in years, and SIR.
2. Annual Energy Savings Analysis – a summary of pre- and post- energy measure installation conditions.
3. Life-Cycle Cost Analysis/Net Present Values Analysis – summaries based on the Effective Useful Life (EUL) for each energy measure, taken from the DEER.
4. Total Summary Table (in a separate tab in the calculator) – a summary of all the energy efficiency projects your LEA proposes to implement. Once your LEA completes the calculators applicable to your proposed projects, all energy savings data will be automatically populated in the “Total-Summary” tab of the spreadsheet, and calculations for bundled energy measures will be obtained.

Values generated in the energy efficiency measure calculators may be used to complete your energy expenditure plan.

Instructions

The following are the instructions to use the energy savings calculators:

Step 1: Benchmarking Calculator

- a. Gather Information: Before entering the required information into the benchmarking calculator, an LEA must perform the following steps.
 - Gather the past fiscal year’s 12-months of utility billing data for electricity and natural gas for the school or site where your LEA proposes to implement energy efficiency projects. If your electricity or natural gas is supplied by a

third party, obtain the annual billing data from the third-party supplier.

- If the school or site uses liquid fuel such as propane or fuel oil for heating, gather the usage and cost data for the same 12-month period.
- If the school or site has multiple meters or third-party services (for example, propane), add together the annual usage and costs to determine a total aggregate amount.

b. School Information:

School Information	
School Name	
School CDS Code	
Mailing Address	
Electric Utility:	
Gas Utility:	
Billing Period (Fiscal Year)	
Total Square Footage of School	-

- 1.) **School Name:** Enter the name of the school or site where your LEA proposes to implement the energy efficiency measures.
- 2.) **School CDS Code:** Enter the 14-digit county-district-school number of the school or site with no spaces or hyphens.
- 3.) **Mailing Address:** Enter the mailing address of the school or site where your LEA proposes to implement the energy efficiency measures.
- 4.) **Electric Utility:** Enter the name of the electric utility provider of the school or site.
- 5.) **Gas Utility:** Enter the name of the natural gas, propane, or fuel oil provider of the school or site. Leave this blank if the school uses propane or fuel oil.
- 6.) **Billing Period (Fiscal Year):** Enter the fiscal year associated with the energy bills used to fill out the calculators. A fiscal year is designated as July 1 – June 30. If your energy expenditure plan is submitted in fiscal year 2014-2015, use energy bills from fiscal year 2013-2014.
- 7.) **Total Square Footage of School:** Enter the approximate total gross square footage of all the school buildings, excluding outside covered walkways or porch areas.

c. Electricity Information:

<i>Electricity</i>	
Average Maximum Demand (kW):	
Annual PV Electricity Production(kWh)	
Electricity Purchase from Utility(kWh)	
Total Annual Electric Use (kWh):	
Cost paid to PPA vendor & other supplier (\$)	
Total Annual Utility Electric Charges (\$)	

- 1.) ***Average Maximum Demand (kW):*** Enter the average maximum demand of the school from the previous fiscal year electric bills. Calculate this value by averaging the peak demand stated in the previous fiscal year bills. If a school or site has multiple electric meters, sum the peak demand of all the meters before averaging. If the demand information is not provided in the monthly bills, then leave this field blank.

- 2.) ***Annual PV Electricity Production (kWh):*** Enter the total electricity generated in the previous fiscal year from a PV system, if you have PV on-site. This information can be obtained from the solar tracking system, production data stored in the inverter, an energy monitoring system, or a PPA electric bill.

- 3.) ***Electricity Purchase from Utility (kWh):*** Enter the total electricity purchased in the previous fiscal year from your local utility. If the school or site has multiple meters, sum the total electricity purchased from your local utility from all meters.

- 4.) ***Total Annual Electric Use (kWh):*** Enter the total annual electric consumption of the school or site from the previous fiscal year. This is the sum of the Annual PV Electricity Production (#2 above), Electricity purchased from utility (#3 above), and Electricity purchased from third-party supplier.

- 5.) ***Cost paid to PPA vendor & other supplier (\$):*** Enter the total annual cost paid to the PPA vendor or other third-party for electricity purchased under a PPA or other electricity purchase agreement.

- 6.) ***Total Annual Utility Electric Charges (\$):*** Enter the annual total utility electricity cost for the school or site from the previous fiscal year electric bills. Calculate this value by adding the electric utility charges stated in the previous fiscal year bills. If the school or site has multiple electric meters, include the electric utility charge for all meters at the school or site.

d. Natural Gas Information:

<i>Natural Gas</i>	
Total Annual Natural Gas Use (therms):	-
Total Annual Gas Charges (\$):	\$ -

Note: Due to DEER limitations, information on only one type of fuel can be keyed into the energy savings calculator. If an LEA uses multiple fuels, enter the information of the primary fuel and enter the fuel use (therms) and fuel charges (\$) as a footnote in the spreadsheet. Energy Commission staff will make the necessary adjustments to the fuel savings.

- 1.) ***Total Annual Natural Gas Use (therms):*** Enter the annual total natural gas usage of the school or site from the previous fiscal year natural gas bills. Calculate this value by adding the natural gas usage stated in the previous fiscal year bills. If the school or site has multiple natural gas meters, include the annual natural gas usage for all meters at the school or site. If the school or site does not use natural gas, enter 0.
- 2.) ***Total Annual Gas Charges (\$):*** Enter the annual total natural gas cost for the school or site from the previous fiscal year natural gas bills. Calculate this value by adding the natural gas charges stated in the previous fiscal year bills. If the school or site has multiple natural gas meters, include the annual natural gas charges for all meters at the school or site. If a third-party supplier is used, enter the total cost from the third-party cost for commodity and the transportation cost from the local utility. If the school does not use natural gas, enter 0.

e. Other Fuels Information:

<i>Other Fuels (if applicable)</i>	
Total Annual Propane Use (gals):	0
Total Annual Propane Charges (\$):	\$ -
Total Annual Fuel Oil Use (gals):	0
Total Annual Fuel Oil Costs (\$):	\$ -

- 1.) ***Total Annual Propane Use (gals):*** Enter the total annual propane usage in gallons by the school or site from the previous fiscal year propane bills. Calculate this value by adding the propane usage stated in the previous fiscal year bills. If the school has multiple propane services, include the annual propane usage for all services. If the school does not use propane, enter 0.

- 2.) **Total Annual Propane Charges (\$):** Enter the total annual propane cost for the school from the previous fiscal year propane bills. Calculate this value by adding the propane charges stated in the previous fiscal year bills. If the school or site has multiple propane services, include the annual propane charge for all services. If the school does not use propane enter 0.
- 3.) **Total Annual Fuel Oil Use (gals):** Enter the total annual fuel oil usage in gallons by the school from the previous fiscal year fuel oil bills. Calculate this value by adding the fuel oil usage stated in the previous fiscal year bills. If the school or site has multiple fuel oil services, include the annual fuel oil usage for all services. If the school does not use fuel oil enter 0.
- 4.) **Total Annual Fuel Oil Costs (\$):** Enter the total annual fuel oil cost for the school from the previous fiscal year fuel oil bills. Calculate this value by adding the fuel oil usage stated in the previous fiscal year bills. If the school or site has multiple fuel oil services, include the annual fuel oil usage for all services. If the school does not use fuel oil enter 0.

Step 2: Measure Calculators

1. Lighting Measures Calculators:

To simplify the information required from the school or site staff, calculators for lighting measures use the “assumed lamp ratio” and “average lighting hours” from the DEER. Average energy impacts (that is, kWh, kW, and therms) were calculated from education buildings (such as, primary schools, secondary schools, and portable classrooms) from the DEER in all four IOUs (Pacific Gas and Electric, Southern California Edison, Southern California Gas, and San Diego Gas & Electric) service territories.

To obtain the average energy impact for each measure, the Energy Commission performed baseline performance mapping, including building type, building size, building vintage, equipment efficiency, zip code, and climate zones. The interactive effects among energy efficiency measures were also considered in the energy savings calculation. For example, an interior lighting retrofit measure would reduce the building electricity consumption, but it also requires additional fuel to make up the heat loss from the lighting retrofit.

If your school or LEA can identify the proposed equipment quantity and wattage, the calculator will generate all the energy savings and SIR for the measures you are considering.

ECM 1: Replace incandescent lights with compact fluorescent

ECM 1	Replace incandescent light with compact fluorescent light	Fill in your answers
Measure 1	Quantity of incandescent lights to be replaced with CFLs?	0
	What is the total wattage of all new CFL lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	0

Incandescent, halogen lamps, or flood lights are very inefficient. If a school or site uses incandescent or halogen lamps or flood lights, these lights can be replaced with compact fluorescent lights (CFL) to save energy. These replacement measures can save more than 70 percent of the energy from the existing light fixtures.

- 1.) **Quantity of incandescent lights to be replaced with CFLs?** Enter the quantity of the incandescent, halogen, and flood lights to be replaced with compact fluorescent light lamps. Both screwed-in and hardwired lamps are permitted.
- 2.) **What is the total wattage of all new CFL Lamps?** Enter the total wattage (in watts) of the CFL lamps you plan to install at the school or site. For example, if installing one 13 watt CFL and one 17 watt CFL, the total wattage is 30 watts.
- 3.) **What is the total installed cost for this measure?** Enter the estimated total cost, including materials and labor, to install the CFL lamps.
- 4.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the CFL lamps, if known and available.

ECM 2: Replace incandescent lights with light-emitting diodes (LED) lights

ECM 2	Replace incandescent light with LED light	Fill in your answers
Measure 2	Quantity of incandescent bulbs to be replaced with LED lights?	0
	What is the total wattage of all new LED lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	0

Incandescent, halogen lamps, and flood lights are inefficient. If a school or site uses incandescent or halogen lamps or flood lights, these lights can be replaced with LED lights to save more than 70 percent of the energy from the existing light fixtures. In addition, LED lights have a long expected useful life.

- 1.) **Quantity of incandescent lights to be replaced with LED lights?** Enter the quantity of the incandescent, halogen, and flood lights you plan to replace with LED lamps. Both screwed-in and hardwired lamps are permitted.
- 2.) **What is the total wattage of all new LED lamps?** Enter the total wattage (in watts) of the LED lamps you plan to install at the school or site. For example, if installing one 10 watt LED and a 30 watt LED, the total lamp wattage is 40 watts.
- 3.) **What is the total installed cost for this measure?** Enter the estimated total cost, including materials and labor, to install the LED lamps.
- 4.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the LED lamps, if known and available.

ECM 3 & 4: Convert incandescent/CFL exit sign to LED exit sign

ECM 3&4	Convert incandescent/CFL exit sign to LED exit sign	Fill in your answers
Measure 3	Quantity of CFL exit signs to be replaced with LEDs?	0
	What is the wattage of each new LED exit sign?	0
	What is the total installed cost for this measure?	0
	What is the utility rebate for this measure?	0
Measure 4	Quantity of incandescent exit signs to be replaced with LEDs?	0
	What is the wattage of each new LED Exit sign?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	0

Incandescent or compact fluorescent lights in exit signs are very inefficient. If the school or site uses incandescent or CFL lights in exit signs, these lights can be replaced with LED lamps to save more than 60 percent to 90 percent of the energy from the existing light fixtures.

Measure 3:

- 1.) **Quantity of CFL exit signs to be replaced with LEDs?** Enter the quantity of the CFL exit signs proposed to be replaced with LED exit signs. Both retrofit kits and fixture replacements are permitted.
- 2.) **What is the wattage of the new LED exit sign?** Enter the wattage of each new LED exit sign.

- 3.) *What is the total installed cost for this measure?* Enter the estimated total cost for installing the LED exit signs, including materials and labor.
- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the LED exit signs, if known and available.

Measure 4:

- 1.) *Quantity of incandescent exit signs to be replaced with LEDs?* Enter the quantity of the incandescent exit signs proposed to be replaced with LED exit signs.
- 2.) *What is the wattage of the new LED exit sign?* Enter the wattage of each new LED exit sign.
- 3.) *What is the total installed cost for this measure?* Enter the estimated total cost for installing the LED exit signs, including materials and labor.
- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the exit signs, if known and available.

ECM 5 & 6: Convert T12 fluorescent to T8 with electronic ballast or LED lamps

ECM 5&6	Convert T12 fluorescent to T8 with electronic ballast or LED Lamps	Fill in your answers
	This ECM is for 4 foot linear fluorescent or 2 foot U-tube retrofit. If 8-foot fluorescent is converted to two 4-foot, multiply the quantity of lamp by two.	
Measure 5	Quantity of 34 watt T12 lamps to be replace with T8?	-
	How many 40 watt T12 lamps will be replaced with T8?	-
	What is the new T8 lamp wattage?	32
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -
Measure 6	Quantity of 34 watt T12 lamps to be replace with LED lamps?	0
	Quantity of 40 watt T12 lamps to be replaced with LED lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

Linear T12 fluorescent lights (approximately 1½ inch in diameter) are an older generation technology and are very inefficient. If a school still uses T12 lamps with magnetic ballasts, these lights should be replaced with newer T8 lamps with electronic ballasts or LED lamps to save energy. T8 fluorescent lights are 1 inch in diameter. These measures can save more than 25 percent to 60 percent of the energy from the existing light fixtures. Use ECM 5 & 6 for 4-foot linear fluorescents or 2-foot U-tube fluorescent

light retrofits only. If the school or site you are evaluating uses 8-foot fluorescents and would like to convert to two 4-foot T8 or LED lights, multiply the quantity of lamps by two.

Measure 5:

- 1.) ***Quantity of 34 watt T12 lamps to be replaced with T8?*** Enter the quantity of 34 watt T12 lamps with magnetic ballasts to be replaced with T8 lamps and electronic ballasts. These 34 watt lamps are labeled as 34 watt energy-saving (ES) or energy-efficient (EE) lamps. Both retrofit kits and fixture replacements are permitted. For example, if you plan to retrofit 50 2-lamp fixtures, enter 100. If there are no 34 watt lamps, enter 0.
- 2.) ***How many 40 watt T12 lamps will be replaced with T8?*** Enter the quantity of the 40 watt T12 lamps with magnetic ballasts you plan to replace with T8 lamps and electronic ballasts. Note that 40 watt T12 lamps were once typical, but are no longer in common use. Both retrofit kits and fixture replacements are permitted. If there are no 40 watt lamps, enter 0.
- 3.) ***What is the new T8 lamp wattage?*** From the drop-down menu, select the wattage of the new T8 lamps you plan to install.
- 4.) ***What is the total installed cost for this measure?*** Enter the estimated total cost, including materials and labor, to install the T8 lamps.
- 5.) ***What is the utility rebate for this measure?*** Enter the utility rebate amount for the T8 lamps, if known and available.

Measure 6:

- 1.) ***Quantity of 34 watt T12 lamps to be replaced with LED lamps?*** Enter the quantity of 34 watt T12 lamps you plan to replace with LED lamps. If there are no 34 watt lamps, enter 0.
- 2.) ***Quantity of 40 watt T12 lamps to be replaced with LED lamps?*** Enter the quantity of the 40 watt T12 lamps you plan to replace with LED lamps. If there are no 40 watt lamps, enter 0.
- 3.) ***What is the total installed cost for this measure?*** Enter the estimated total cost, including materials and labor, to install the LED lamps.

- 4.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the LED lamps, if known and available.

(NEW) ECM 6A: Convert 4 foot 32 watt T8 fluorescent fixture to LED lamps

ECM 6A	Convert 32 Watt T8 fluorescent fixture to LED lamps	Fill in your answers
	This ECM is for 4-foot linear fluorescent. If 8-foot fluorescent is converted to two 4-foot, multiply the quantity of lamp by two.	
	Quantity of 32 watt T8 lamps to be replaced with LED lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

Linear 32 watt T8 lamps are an older generation T8 technology and can be replaced with higher-efficiency LED tube lamps. If a school would like to replace the existing T8 lamps and electronic ballasts with new LED lights with Proposition 39 funds, a calculator is added for this energy efficiency measure. This measure can save roughly 33 percent of the energy of each lamp from the existing light fixtures. Use ECM 6A for 4-foot linear fluorescents light retrofit only. If the school or site you are evaluating uses 8-foot fluorescents and would like to convert to two 4-foot T8 or LED lights, multiply the quantity of lamps by two.

- 1.) **Quantity of 32 watt T8 lamps to be replaced with 4 foot LED lamps?** Enter the quantity of 32 watt T8 lamps you plan to replace with LED lamps.
- 2.) **What is the total installed cost for this measure?** Enter the estimated total cost, including materials and labor, to install the LED lamps.
- 3.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the LED lamps, if known and available.

ECM 7: Replace 32 watt T8 lamps with 28 watt T8 lamps

ECM 7	Replace 32 Watt T8 lamps with 28 Watt T8 Lamps	Fill in your answers
	Quantity of 32 watt T8 lamps to be replaced?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

The newer generation fluorescent lamps use about 15 percent less energy and produce about the same amount of lumen output compared to older T8 lamps. Most of the 32

watt T8 lamps with instant start electronic ballast can be replaced with 28 watt energy savings lamps.

- 1.) **Quantity of 32 watt T8 lamps to be replaced?** Enter the quantity of 32 watt T8 lamps to be replaced with 28 watt T8 lamps.
- 2.) **What is the total installed cost for this measure?** Enter the estimated total cost including materials and labor.
- 3.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the lamps, if known and available.

ECM 8 & 9: Replace exterior mercury vapor/HPS with LED induction lights

ECM 8&9	Replace exterior mercury vapor/HPS with LED/Induction lights	Fill in your answers
Measure 8	Quantity of mercury vapor fixtures to be replaced?	0
	What is the total wattage of all new LED or Induction lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -
Measure 9	Quantity of HPS fixtures to be replaced?	0
	What is the total wattage of all new LED or Induction lamps?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

Older-generation, high-intensity discharge lights, such as mercury vapor and high-pressure sodium (HPS) lights, are inefficient and cannot be used with dimming control. The new induction and LED lights are able to generate more visible lumens, have longer life, can work with staged or dimming controls are more energy-efficient and can save from 30 percent to 50 percent of energy use.

Measure 8:

- 1.) **Quantity of mercury vapor fixtures to be replaced?** Enter the quantity of mercury vapor lights to be replaced with LED or induction lights.
- 2.) **What is the total wattage of all new LED or Induction lamps?** Enter the total wattage of the new LED or induction lights. For example, if installing one 30 watt LED light and one 70 watt LED light, the total wattage is 100 watts.
- 3.) **What is the total installed cost for this measure?** Enter the estimated total cost, including materials and labor.

- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the lamps, if known and available.

Measure 9:

- 1.) *Quantity of HPS fixtures to be replaced?* Enter the quantity of the high-pressure sodium lights to be replaced with LED or induction lights.
- 2.) *What is the total wattage of all new LED or Induction lamps?* Enter the total wattage of the new LED or induction lights. For example, if installing one 70 watt LED light and one 100 watt LED parking lot light, the total wattage is 170 watts.
- 3.) *What is the total installed cost for this measure?* Enter the estimated total cost, including materials and labor.
- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the lamps, if known and available.

ECM 10: *Install occupancy control for intermittently occupied rooms*

ECM 10	Install occupancy control for intermittently occupied rooms	Fill in your answers
	Quantity of occupancy sensors to be installed?	0
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

Many staff offices, break rooms, bathrooms, and classrooms are occupied intermittently. The lights in these rooms are often left on. Occupancy sensor controls can be used to turn off these lights when no movement or body heat is detected after an interval of time. The sensor can be wall-mounted or ceiling-mounted. The amount of achieved energy savings by turning off the lights in unoccupied spaces depends on the number of lights, type of lights, and hours of reduced usage in a space.

- 1.) *Quantity of occupancy sensors to be installed?* Enter the number of occupancy sensors to be installed (both wall-mounted and ceiling-mounted sensors of any sensing technology).
- 2.) *What is the total installed cost for this measure?* Enter the estimated total cost for installing the occupancy sensors, including materials and labor.
- 3.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the occupancy sensors, if known and available.

2. HVAC and Mechanical Measures Calculators:

The following calculators can be used to calculate energy savings for some of the HVAC and mechanical energy efficiency measures.

The assumptions and energy impacts used in the calculators for HVAC measures were derived from data supplied by DEER. In many cases, the baseline energy information was based on the performance mapping conducted by each IOU. Many factors were considered in this baseline performance mapping, including building type, building size, building vintage, equipment efficiency, operating hours, zip code, and climate zone for education-primary school, education-secondary school, and education-portable classroom buildings.

In general, the SIR for HVAC replacement measures is lower than 1.05. Stand-alone HVAC measures may not meet SIR requirements. An LEA has the option to bundle HVAC replacement measures with short-payback energy efficiency measures such as lighting to increase the total combined SIR for the LEA energy project. As long as the total combined SIR exceeds 1.05, the bundled measures may be approved.

ECM 11: Replace old packaged/split HVAC units with high efficiency HVAC

ECM 11	Replace old packaged/split HVAC unit with high efficiency HVAC	Fill in your answers
This calculator only applies to AC up to 65KBtu/hr or 5.4 tons		
	Total quantity of AC and heat pump unit at school	0
	Total tonnage of AC and heat pump unit at school	0
	Quantity of AC to be replaced with SEER 13 unit?	0
	Quantity of AC to be replaced with SEER 14 unit?	0
	What is the total AC tonnage to be replaced with SEER 13 unit?	0
	What is the total AC tonnage to be replaced with SEER 14 unit?	0
	What is the IOU (or nearest IOU) area the unit is installed?	PGE
	What is the total installed cost for this measure? \$	-
	What is the utility rebate for this measure? \$	-
	Are there other non-repayable funds applied to this measure? \$	-

This calculator applies only to air-conditioning (AC) units up to a cooling capacity of 65,000 Btu/hr (or roughly 5.4 tons) with a SEER 13 or SEER 14 efficiency rating due to DEER database limitations.

- 1.) ***Total quantity of AC and heat pump unit at school?*** Enter the quantity of all the AC units at the school site including packaged units, split systems, and heat pump units.

- 2.) ***Total tonnage of AC and heat pump unit at school?*** Add the tonnage of the packaged units, split systems, and heat pump units and then enter the total tonnage of AC and heat pump units at the school site.
- 3.) ***Quantity of AC to be replaced with SEER 13 unit?*** Enter the quantity of the AC units to be replaced with SEER 13 units. If not applicable, enter 0.
- 4.) ***Quantity of AC to be replaced with SEER 14 unit?*** Enter the quantity of the AC units to be replaced with SEER 14 units. If not applicable, enter 0.
- 5.) ***What is the total AC tonnage to be replaced with SEER 13 unit?*** Enter the total tonnage of the AC units with SEER 13 efficiency rating to be installed. If installing two 5 ton units, the total tonnage is 10 tons. If not applicable, enter 0.
- 6.) ***What is the total AC tonnage to be replaced with SEER 14 unit?*** Enter the total tonnage of the AC units with SEER 14 efficiency rating to be installed. If installing two 5 ton units, the total tonnage is 10 tons. If not applicable, enter 0.
- 7.) ***What is the IOU (or nearest IOU) area the unit is installed?*** Select the nearest IOU utility where the AC is to be installed. If you are in a San Diego Gas & Electric service territory (SDG&E), select SDG&E. If you are a SMUD customer, select PG&E.
- 8.) ***What is the total installed cost for this measure?*** Enter the estimated total cost, including materials and labor.
- 9.) ***What is the utility rebate for this measure?*** Enter the utility rebate amount for the HVAC units, if known and available.
- 10.) ***Are there other non-repayable funds applied to this measure?*** Enter the non-repayable fund amount for this measure. Non-repayable funds include bond funding, deferred maintenance, general operation budgets and other funds used to finance the project. This is funding that does not need to be repaid by the LEA.

ECM 12: Replace old heat pump (HP) with high efficiency heat pump

ECM 12	Replace old heat pump with high efficiency heat pump	Fill in your answers
This calculator only applies to heat pump up to 65KBtu/hr or 5.4 tons		
	Total quantity of AC and heat pump unit at school	0
	Total tonnage of AC and heat pump unit at school	0
	Quantity of HP to be replaced with SEER 13 (HSPF 7.7) unit?	0
	Quantity of HP to be replaced with SEER 14 (HSPF 8.3) unit?	0
	Quantity of HP to be replaced with SEER 15 (HSPF 8.8) unit?	0
	What is the total HP tonnage to be replaced with SEER 13 unit?	0
	What is the total HP tonnage to be replaced with SEER 14 unit?	0
	What is the total HP tonnage to be replaced with SEER 15 unit?	0
	What is the IOU (or nearest IOU) area the unit is installed?	PGE
	What is the total installed cost for this measure? \$	-
	What is the utility rebate for this measure? \$	-
	Are there other non-repavable funds applied to this measure? \$	-

The cooling energy savings calculation approach for heat pump systems is similar to that of the packaged AC systems. The heating seasonal performance factor (HSPF) for an AC SEER 13 unit is assumed to be 7.7. The HSPF for an AC SEER 14 unit is assumed to be increased proportionally to 8.3, and the HSPF for an AC SEER 15 unit is 8.8. The higher the HSPF, the more efficient it is.

This calculator applies only to heat pumps up to 65,000 Btu/hr (or about 5.4 tons) with a SEER 13, SEER 14, or SEER 15 efficiency rating.

- 1.) **Total quantity of AC and heat pump unit at school?** Enter the quantity of all the AC units at the school site including packaged units, split systems and heat pump units.
- 2.) **Total tonnage of AC and heat pump unit at school?** Add the tonnage of the packaged units, split systems and heat pump units and then enter the total tonnage of AC and heat pump units at the school site.
- 3.) **Quantity of HP to be replaced with SEER 13 (HSPF 7.7) unit?** Enter the quantity of heat pump units with a SEER 13 efficiency rating to be installed.
- 4.) **Quantity of HP to be replaced with SEER 14 (HSPF 8.3) unit?** Enter the quantity of heat pump units with a SEER 14 efficiency rating to be installed.
- 5.) **Quantity of HP to be replaced with SEER 15 (HSPF 8.8) unit?** Enter the quantity of heat pump units with a SEER 15 efficiency rating to be installed.

- 6.) *What is the total HP tonnage to be replaced with SEER 13 unit?* Enter the total tonnage of the heat pump units with SEER 13 efficiency rating to be installed. For example, if installing two 5 ton and two 4 ton units, the total tonnage is 18 tons.
- 7.) *What is the total HP tonnage to be replaced with SEER 14 unit?* Enter the total tonnage of the heat pump units with SEER 14 efficiency rating to be installed. For example, if installing two 5 ton and two 4 ton units, the total tonnage is 18 tons.
- 8.) *What is the total HP tonnage to be replaced with SEER 15 unit?* Enter the total tonnage of the heat pump units with SEER 15 efficiency rating to be installed. For example, if installing two 5 ton and two 4 ton units, the total tonnage is 18 tons.
- 9.) *What is the IOU (or nearest IOU) area the unit is installed in?* Select the nearest IOU utility where the AC is to be installed. For example, if you are in an SDG&E service territory, select SDG&E. If you are a SMUD customer, select PG&E.
- 10.) *What is the total installed cost for this measure?* Enter the estimated total cost, including materials and labor.
- 11.) *What is the utility rebate for this measure?* Enter the utility rebate amount for the HVAC units, if known and available.
- 12.) *Are there other non-repayable funds applied to this measure?* Enter the non-repayable fund amount for this measure. Non-repayable funds include bond funding, deferred maintenance, general operation budgets and other funds used to finance the project. These funds do not need to be repaid by the LEA.

ECM 13A: Replace boiler with high efficiency condensing boiler

ECM 13A	Replace boiler with high efficiency condensing boiler	Fill in your answers
	Quantity of boiler(s) to be replaced with AFUE 92-94 unit?	0
	Quantity of boiler(s) to be replaced with AFUE 95-97 unit?	0
	What is the total kBtu/hr of the new AFUE92-94 units?	-
	What is the total kBtu/hr of the new AFUE95-97 units?	-
	What is the IOU (or nearest IOU) area the unit is installed in?	PG&E
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

Older boilers are noncondensing and have lower heat recovery exchangers. The efficiency of the old noncondensing boilers varies from 78 percent to 80 percent. A new

condensing boiler is able to recover additional heat from the flue gas and can achieve annual fuel use efficiency (AFUE) of up to 97 percent. To simplify the efficiency category, the calculator segregates the new condensing boiler into two categories: condensing boilers with an AFUE from 92 percent to 94 percent and condensing boilers with an AFUE from 95 percent to 97 percent. This efficiency rating can be obtained from the equipment vendor's boiler cut sheet.

- 1.) ***Quantity of boiler(s) to be replaced with an AFUE 92-94 unit?*** Enter the quantity of condensing boilers to be installed with an AFUE or heat recovery efficiency from 92 percent to 94 percent. If none, enter 0.
- 2.) ***Quantity of boiler(s) to be replaced with an AFUE 95-97 unit?*** Enter the quantity of condensing boilers to be installed with an AFUE or heat recovery efficiency from 95 percent to 97 percent. If none, enter 0.
- 3.) ***What is the total kBtu/hr of the new AFUE 92-94 units?*** Enter the total kBtu/hr of the new AFUE 92-94 unit. For example, if installing two 250,000 Btu/hr condensing boilers with an AFUE of 92 percent to 94 percent, the total kBtu/hr is 500. If there are no boilers to be installed in this category, enter 0.
- 4.) ***What is the total kBtu/hr of the new AFUE 95-97 units?*** Enter the total kBtu/hr of the new AFUE 95-97 units. If there are no boilers to be installed in this category, enter 0.
- 5.) ***What is the IOU (or nearest IOU) area the unit is installed in?*** Select the nearest IOU utility where the boiler is to be installed. For example, if you are in an SDG&E service territory, select SDG&E. If you are a SMUD customer, select PG&E.
- 6.) ***What is the total installed cost for this measure?*** Enter the estimated total cost, including materials and labor.
- 7.) ***What is the utility rebate for this measure?*** Enter the utility rebate amount for the boiler units, if known and available.

ECM 13B: Replace furnace with high efficiency condensing furnace

ECM 13B	Replace furnace with high efficiency condensing furnace	Fill in your answers
	Quantity of furnace(s) to be replaced with AFUE 92-94 unit?	0
	Quantity of furnace(s) to be replaced with AFUE 95-97 unit?	0
	What is the total kBtu/hr of the new AFUE92-94 units?	-
	What is the total kBtu/hr of the new AFUE95-97 units?	-
	What is the IOU (or nearest IOU) area the unit is installed in?	PGE
	What is the total installed cost for this measure?	\$ -
	What is the utility rebate for this measure?	\$ -

This calculator is very similar to the condensing boiler calculator (ECM 13A). The only difference is that the EUL for furnaces is 15 years rather than 20 years for boilers.

- 1.) **Quantity of furnace(s) to be replaced with an AFUE 92-94 unit?** Enter the quantity of condensing furnaces to be installed with an AFUE or heat recovery efficiency from 92 percent to 94 percent. If none, enter 0.
- 2.) **Quantity of furnace(s) to be replaced with an AFUE 95-97 unit?** Enter the quantity of condensing furnaces to be installed with an AFUE or heat recovery efficiency from 95 percent to 97 percent. If none, enter 0.
- 3.) **What is the total kBtu/hr of the new AFUE 92-94 units?** Enter the total kBtu/hr of the new AFUE 92-94 unit. For example, if installing three 75,000 Btu/hr condensing furnaces with an AFUE of 92 percent to 94 percent, the total kBtu/hr is 225. If there are no furnaces to be installed in this category, enter 0.
- 4.) **What is the total kBtu/hr of the new AFUE 95-97 units?** Enter the total kBtu/hr of the new AFUE 95-97 units. If there are no furnaces to be installed in this category, enter 0.
- 5.) **What is the IOU (or nearest IOU) area the unit is installed in?** Select the nearest IOU utility where the AC is to be installed. For example, if you are in an SDG&E service territory, select SDG&E. If you are a SMUD customer, select PG&E.
- 6.) **What is the total installed cost for this measure?** Enter the estimated total cost, including materials and labor.
- 7.) **What is the utility rebate for this measure?** Enter the utility rebate amount for the furnace units, if known and available.

ECM 14: Seal existing HVAC leaky ducts

ECM 14	Seal existing HVAC leaky duct	Fill in your answers
	How many total tons of AC where ducts will be sealed?	0
	What is the total installed cost?	0
	What is the utility rebate for this measure?	0

Many old single-zone packaged AC and heat pump systems use duct tape for all the joints and registers. In many leakage tests, the leaked volume could be as high as 40 percent among the supply and return ducts. These leaky ducts could be tested and sealed to reduce the leaked volume down to as low as 18 percent. Many local utilities also provide rebates to perform this service.

- 1.) **How many total tons of AC where ducts will be sealed?** Enter the total tonnage of single-zone AC units where air ducts or distribution systems will be sealed. For example, for four 5 ton AC units where ducts will be sealed, the total tonnage is 20 tons.
- 2.) **What is the total installed cost?** Enter the estimated total cost, including materials and labor.
- 3.) **What is the utility rebate for this measure?** Enter the utility rebate amount, if known and available.

ECM 15: Install variable speed drives for pumps and fans

ECM 15	Install variable speed drive for pumps and fans	Fill in your answers
	What is the total motor horsepower that will have VSD?	0
	What is the total installed cost?	\$ -
	What is the utility rebate for this measure?	0

Constant speed motors for pumps and fans run continuously, whether the zone temperature has been achieved or not. Variable speed drives (VSD) can reduce the speed of the pumps and fans when the zone temperature is achieved. Therefore, a significant amount of energy savings can be realized. VSDs can reduce the energy consumption during part-load operating conditions. Therefore, the lower the motor speed, the higher the energy savings.

- 1.) **What is the total motor horsepower that will have VSD?** Enter the total motor capacity in horsepower (hp) where variable speed drive controls will be installed.

If installing VSDs for two 10 hp motors, the total motor horsepower is 20 hp.

- 2.) **What is the total installed cost?** Enter the estimated total cost, including materials and labor.
- 3.) **What is the utility rebate for this measure?** Enter the utility rebate amount, if known and available.

ECM 16: Replace manual thermostat with programmable thermostat

ECM 16	Replace manual thermostat with programmable thermostat	Fill in your answers
	Quantity of old thermostats to be replaced?	0
	What is the total installed cost?	0
	What is the utility rebate for this measure?	0

Many facilities still use old on/off thermostats. The HVAC equipment controlled by the on/off thermostats could be running continuously if they are not turned off manually. The new setback, programmable, smart, or network thermostat can be programmed to turn these HVAC units off according to facility schedules or by resetting the zone temperature set point so the HVAC units can be controlled when the zone is not occupied. Significant energy savings can be realized for both heating and cooling operations.

- 1.) **Quantity of old thermostats to be replaced?** Enter the quantity of old thermostats to be replaced with setback, programmable, or network thermostats.
- 2.) **What is the total installed cost?** Enter the estimated total cost, including materials and labor.
- 3.) **What is the utility rebate for this measure?** Enter the utility rebate amount, if known and available.

ECM 17: Replace old motors with premium efficiency motors

ECM 17	Replace old motor with premium efficiency motor	Fill in your answers
	What is the total premium motor horsepower capacity to be installed?	0
	What is the total installed cost?	0
	What is the utility rebate for this measure?	0

Even if older motors still operate, they are not energy-efficient. Because of technology improvements, new premium efficiency motors are more efficient and more compact.

Motors that run continuously for 24 hours a day, such as swimming pool pumps or hot water circulation pumps, are good candidates for this retrofit.

- 1.) ***What is the total premium motor horsepower capacity to be installed?*** Enter the total premium efficiency motor capacity in horsepower to be installed. For example, if installing two 20 hp motors, the total motor horsepower capacity is 40 hp.
- 2.) ***What is the total installed cost?*** Enter the estimated total cost, including materials and labor.
- 3.) ***What is the utility rebate for this measure?*** Enter the utility rebate amount, if known and available.

ECM 18: Replace storage water heater with gas-fired tankless water heater

ECM 18	Replace storage water heater with gas-fired tankless water heater	Fill in your answers
	Quantity of storage heater to be replaced with new instantaneous water heater?	0
	What is the total Btu per hour capacity of the old water heater?	0
	What is the total installed cost?	0
	What is the utility rebate for this measure?	0

Some facilities use storage hot water heaters for small hot water use. The standby loss alone is significant. By converting to instantaneous or tankless hot water heaters, the facility can improve the thermal recovery efficiency and reduce the standby loss of the hot water heater.

- 1.) ***Quantity of storage heater to be replaced with new instantaneous water heater?*** Enter the quantity of storage heaters to be replaced with a new instantaneous water heater.
- 2.) ***What is the total Btu per hour capacity of the old water heater?*** Enter the estimated total capacity of the storage water heater. For example, if replacing two 50,000 Btu/hr units, enter 100,000.
- 3.) ***What is the total installed cost?*** Enter the estimated total cost, including materials and labor.
- 4.) ***What is the utility rebate for this measure?*** Enter the utility rebate amount, if known and available.

3. Plug Load Measures Calculators:

ECM 19: Install smart strip/PC management to control computers/printers

ECM 19	Install smart strip/PC management to control computers/printers	Fill in your answers
Measure 19	How many smart strips or PC management tools will be installed?	0
	What is the proposed computer control?	Smart strip
	What is the total installed cost?	\$ -
	What is the utility rebate for this measure?	\$ -

Some computers and printers are not turned off at the end of the day or during weekends and are left running continuously. By installing a computer management software or “smart strip,” the computers or printers can be turned to sleep mode when they are not used over a certain period.

- 1.) *How many smart strips or PC management tools will be installed?* Enter the quantity of smart strips or PC management tools to be installed.
- 2.) *What is the proposed computer control?* Select the type of control device to be installed.
- 3.) *What is the total installed cost?* Enter the estimated total cost, including materials and labor.
- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount, if known and available.

ECM 20: Install vending machine occupancy control

ECM 20	Install vending machine occupancy control	Fill in your answers
Measure 20	Quantity of vending miser controls to be installed in beverage machines?	0
	Quantity of vending miser controls to be installed in snack machines?	0
	What is the total installed cost?	\$ -
	What is the utility rebate for this measure?	\$ -

Typical vending machines for beverages and snacks run continuously. In addition to lights, beverage machines have a small refrigerator to keep the beverages cold. Vending miser controls can be installed to reduce energy use when there is no occupancy detected.

- 1.) *Quantity of vending miser controls to be installed in beverage machines?* Enter the quantity of vending misers to be installed in beverage machines.
- 2.) *Quantity of vending miser controls to be installed in snack machines?* Enter the quantity of vending misers to be installed in snack machines.
- 3.) *What is the total installed cost?* Enter the estimated total cost, including materials and labor.
- 4.) *What is the utility rebate for this measure?* Enter the utility rebate amount, if known and available.

4. Photovoltaic System (PV) Calculator:

ECM 21	Installing Photovoltaic System	Fill in your answers
	How many PV panels will be installed?	0
	What is the PTC (PVUSA Test Con.) Wattage of each panel?	0
	What is the name plate efficiency of the inverter?	0.0%
	What is the total name plate capacity of the inverter?	0
	*For PV < 30 kW, What is the approved EPBB rebate amount?	\$ -
	*For PV > 30 kW, What is the approved PBI rebate amount?	\$ -
	Other Non-repayable funds	\$ -
	What is the total project cost without rebate?	\$ -
	Does the PV vendor provide 25 year system warranty?	No

This simple calculator for installing PV systems applies only to school-owned PV projects. Because of the initial costs, low or no rebate amounts and the inability of schools to claim tax credits, the SIR for a PV project may not pass the requirement of 1.05. However, a school has the option to bundle a PV system with short payback energy efficiency measures to increase the total SIR. As long as the total LEA combined SIR exceeds 1.05, the bundled measures may be approved and funded up to the grant amount.

The calculator assumes that the potential PV project is sized properly (that is, sized only to save up to the prior-year electricity bill of the facility's, excluding customer and meter charges). In addition, the calculator also assumes that a net energy metering agreement will be signed with the utility.

For a PV system to maintain maximum production, regular maintenance and cleaning are required. It further assumes annual maintenance cost to be 0.2 percent of project cost.

Based on PV monitoring data and on the PV vendor warranty, annual PV production degradation rate is assumed to be 0.7 percent. The life-cycle cost analysis assumes that inverters will be replaced every eight years. The calculator uses a statewide average of 1,500 kWh for each installed kWac.

- 1.) *How many PV panels will be installed?* Enter the quantity of PV panels to be installed.
- 2.) *What is the PTC (PVUSA Test Con.) Wattage of each panel?* Enter the PVUSA test condition (PTC) rating in direct current (DC) watts for the selected panels. This PTC DC wattage rating is generally used for rebate calculations.
- 3.) *What is the name plate efficiency of the inverter?* Enter the nameplate efficiency rating of the inverter(s) to be installed. For example, if installing a certified inverter with 95 percent efficiency rating, enter 95.

Note: Determining PV capacity:

PV capacity in alternating current (AC) will be automatically calculated using this formula:

PV Capacity (Energy Commission AC rating) = Number of panels x PTC panel wattage x inverter efficiency

Electricity production will be calculated using this AC capacity based on an average generation per kW from Energy Commission and CPUC monitoring data.

- 4.) *What is the total name plate capacity of the inverter?* Enter the nameplate capacity of the inverter(s) to be installed. For example, if installing two 20 kW inverters, enter 40 kW. The inverter capacity for continuous operation has to be greater than the maximum capacity of the PV panels.
- 5.) *For PV < 30 kW, what is the approved EPBB rebate amount?* If an Expected Performance Based Buydown (EPBB) rebate is approved for a PV system less than 30 kW for the school site, enter the rebate amount.
- 6.) *For PV ≥ 30 kW, what is the approved PBI rebate amount?* If you have a (Performance Based Incentive) PBI rebate approved by utility, enter the total approved rebate amount. This total PBI rebate will be adjusted by discount rate for NPV.
- 7.) *Other non-repayable funds?* Enter the non-repayable fund amount for this measure. Non-repayable funds include bond funding, deferred maintenance,

general operation budgets and other funds used to finance the project. This funding does not need to be repaid by the LEA.

- 8.) ***What is the total project cost without rebate?*** Enter the estimated total cost for installing the PV system, including material and labor, excluding the rebate.

- 9.) ***Does PV vendor provide 25 year system warranty?*** Select “yes” if the PV vendor provides a 25-year system warranty and “no” if they do not. If the PV vendor does not provide a 25-year system warranty, you will need to select 20 years as the effective useful life of the PV system when you are entering information in the Photovoltaic subsection in the Energy Expenditure Plan Online.

CHAPTER 5: Information Required for Energy Audits

Purpose

The Energy Commission uses energy audits submitted by the LEA to review and validate the energy savings and SIR calculations in the energy expenditure plan. To expedite the review of proposed eligible energy projects for which energy audits have been completed, the Energy Commission has prepared a concise format for LEAs to use when submitting these energy audits as back-up documentation. Audit documentation submitted in a format different from that described below will result in the need to resubmit the information or a much longer review time, resulting in delay in energy expenditure plan approvals. LEAs not using the Energy Commission energy savings calculators as backup documentation to validate their energy savings and SIR calculations must use the format outlined below.

Information Required

An energy audit must consist of:

1. Facility Background
2. Energy Efficiency Measure (EEM) Summaries
3. Grants and Incentives
4. Appendices
 - a. Appendix A
 - b. Appendix B

The following are instructions for and a description of each part of the energy audit:

Facility Background

Prepare one study or savings analysis for each school in the energy expenditure plan and keep the analysis for each school in a separate file.

Based on the survey of the school buildings and interviews with the school staff, provide a brief description of the existing condition of the facility, energy-using equipment, energy use in each of the following categories:

- Utility costs, rate schedule and consumptions for each school
- Age, square footage and typical hours of the building
- Age, efficiency, current hours of operation and controls of the energy using equipment
- Size, age, annual production and condition of the onsite generation equipment (such as PV and cogeneration), if applicable.

- Benchmarking data.

Energy Efficiency Measure (EEM) Summaries

Provide a description of the proposed EEMs here. Describe, separately, the EEMs in each end-use category as listed below. If the EEM is recommended in only one end-use area, skip other end-use sections.

Please include one section describing the existing equipment problems and associated energy use and one section describing the recommended retrofit to mitigate the problem and how the energy savings are obtained. Prepare a table for each EEM summarizing the energy and energy cost savings (as shown in following table).

Energy Efficiency Measure	Demand Savings (kW)	Electricity Savings (kWh/yr)	Electricity Cost Savings (\$/yr)	Natural Gas or Fuel Savings (therms or gal/yr)	Natural Gas or Fuel Cost Savings (\$/yr)	Annual Cost Savings	Installed Measure Cost
Total							

The following is the information required for the end-use areas:

- Building Envelope
 - A detailed model or engineering calculation if insulation, window shade, window replacement, cool roof or other building envelope measure is considered.
 - A description of the existing building envelope condition and the proposed retrofit or replacement measure in the study, including quantity, square footage, orientation, U-value and/or shading heat gain coefficient improvement, and so forth
 - Assumptions and output for the calculation method and the cost savings.
 - A summary of the model run for the pre- and post-retrofit case in the Appendix B of the energy audit, if a building simulation model is used.
- Lighting
 - A room-by-room survey of lighting systems at each school site.
 - A description of quantity, wattage, operating hours and current controls of the existing lighting systems and recommended modifications in the study. Separate

fixture retrofit measures from lighting control measures and relamping measures as each measure has a specific Effective Useful Life (EUL).

- A table for each lighting measure type (for example, fixture retrofit, occupancy sensors, or relamping measure, and so forth) in the Appendix B of the energy audit.

If the baseline kWh use for all lights exceeds 35 percent of the annual kWh consumption, please provide a brief energy balance for the school. The purpose for the energy balance calculation is to make sure the baseline energy use and energy savings are reasonable.

- HVAC

- A survey of the HVAC system and associated equipment (such as circulation pumps, air handlers, economizers, cooling tower and controls) for each school.
- A discussion of the condition, age, quantity, size, efficiency and controls (or operating hours) of the existing HVAC equipment and problems obtained from the school staff in the pre-retrofit section.
- A description of how the recommended measure(s) or proposed modifications would improve the system efficiency and save energy. If a retro-commissioning measure is considered, it needs to be linked to a hardware installation measure. Soft energy savings from resetting indoor temperature or schedule may be temporary and could be easily lost due to school override. However, continuous commissioning with a written contract with the school to maintain the operation of the equipment is allowed.

Select the efficiency measure from Appendix E, Effective Useful Life for Energy Measures in Years, in the *2015 Guidelines* carefully because the EUL for each measure may be different. Premium efficiency motor and variable speed drive are classified under the "Other" category in the efficiency measure pull down menu.

If the baseline kWh use for all HVAC equipment exceeds 50 percent of the annual kWh consumption, provide a brief energy balance for the school. The purpose for the energy balance calculation is to make sure the baseline energy use and energy savings are reasonable.

If an HVAC measure has multiple sources of savings such as savings from SEER efficiency improvement and reduced hours of operation, provide incremental savings after each savings function. Many control and VFD measures save energy during part load operation or an unoccupied period and do not save demand charge. Cost savings should be calculated based on energy savings only. Engineering calculation, Bin model analysis and hourly simulation models can be used to calculate energy savings. The backup calculation, calculation spreadsheet and/or the simulation model runs for the pre- and post-retrofit case must be provided in the Appendix B of the energy audit. If a

calculator is used, please attach the calculator in Appendix B as well. Compare your EEM savings with the utility bills. If the savings are too high (for example, more than 20 percent of total utility bills), please make the necessary adjustment.

- Domestic Hot Water
 - A survey of the domestic hot water (DHW) system and associated equipment (such as circulation pumps, storage tanks or cooling towers).
 - A discussion of the age, quantity, size, efficiency and controls (or operating hours) of the existing DHW equipment and problems in a pre-retrofit section.
 - A description of how the recommended measure(s) or proposed modifications would improve the system efficiency and save energy.

Select the efficiency measure from Appendix E, Effective Useful Life for Energy Measures in Years, in the *2015 Guidelines* carefully because the EUL for each measure may be different. An instantaneous hot water heater and a variable speed drive have different EULs. The backup calculation, calculation spreadsheet and/or the model runs for the pre- and post-retrofit case shall be provided in the Appendix. If a calculator is used, please attach the calculator in the Appendix as well.

- Clean Generation Measures
 - A discussion of the existing conditions and energy efficiency measure(s) implemented in existing condition section.
 - A detailed description of quantity, size, energy savings or production, capacity factor and maintenance in this section.
 - Backup calculations based on the current or proposed rate schedule in the Appendix B of the energy audit.

All schools need to consider energy efficiency measures before implementing any clean generation measure. A school can end up with an oversized generation project if it does not consider and implement the EEMs first.

- Other Measures (Plug loads, energy storage, and so forth)
 - A discussion of the existing conditions and proposed modifications for other measures not covered in the above sections such as plug load measures, energy storage or power factor improvement measures.
 - A detailed description on quantity, size, energy savings or production, capacity factor and maintenance in this section.
 - Backup calculations in the Appendix B of the energy audit.

Grants, Incentives, and Non-Repayable Funds

If the LEA intends to use grants, incentives, and non-repayable funds (including general operation budgets, maintenance funds, capital project funds, bond funds, and other funds that do not need to be repaid by the LEA) in the SIR calculation, provide the funding source and amount of the grants and financial incentives information here. For bond-funded grants, indicate the source of funding and why the interest or debt service will not be repaid by the LEA. Describe what measures are eligible for utility rebate and how utility rebates are calculated.

Appendices

Appendix A

Baseline Energy Use, Benchmarking and Energy Balance (if lighting or HVAC kWh energy use exceeds 50 percent of baseline)

Baseline Energy Use

Provide monthly and annual energy use by each account. If the school has a PV system onsite, obtain the annual kWh production from the PV monitoring system or inverter.

Benchmarking

Based on total annual energy use data from all meters serving the school and square footage of the school, create a benchmarking table for all energy uses. (such as \$/sf/yr, kWh/sf/yr, Therms/sf/yr, and so forth).

Energy Balance

If lighting energy use exceeds 35 percent of baseline or HVAC kWh energy use exceeds 50 percent of baseline, provide the percentage estimate for each end use category. Provide all assumptions and calculations for each end-use category.

Appendix B

Energy Efficiency Measure Calculations

Provide the pre-and post-retrofit energy use for the recommended equipment and control measures by school. Discuss how assumptions are used and energy savings are obtained. Compare the demand and energy use for pre- and post-retrofit conditions. Attach analyses documentation and calculations here including spreadsheets, simulation model analysis and/or engineering calculations, as appropriate. Cost savings shall be calculated based on demand and energy charges provided in the applicable electric rate schedule. A detailed cost breakdown for each measure shall be provided including material and installation labor costs listed separately. If the cost is much higher than the commercial market cost, a detailed justification is required.

Chapter 6: Information Required for Power Purchase Agreement Application

Purpose

An LEA may include a clean energy generation Power Purchase Agreement (PPA) as part of the Proposition 39 energy expenditure plan application. To expedite the review of a proposed eligible PPA, the Energy Commission has prepared a concise format for LEAs to use when submitting the PPA project information as supporting documentation to the Energy Expenditure Plan. A sample life cycle cost analysis tool is also provided for LEAs to calculate cost savings, Net Present Value (NPV) and SIR for the proposed PPA based on energy production from the proposed photovoltaic (PV) project. This format also allows Energy Commission staff to evaluate and validate the energy cost savings from the PPA proposals.

Facility Background Information

Prepare the following information for each school site where the LEA proposes a PV installation utilizing a PPA contractor. Each LEA must provide a brief description of the existing condition of the facility, energy-using equipment, and energy use, including but not limited to:

- Facility kWh Consumption: Demand, electricity cost (by time of use where applicable), and rate schedule for each school site where PV is proposed
- Facility Information: Age, square footage and typical hours of buildings operation;
- Facility Operation and Control: Age, efficiency, current hours of operation and type and effectiveness of existing controls of the energy using equipment
- Existing PV/Generation System Information, if applicable: Size, age, annual production and condition of the onsite generation equipment (such as PV and cogeneration)
- Energy Efficiency Measures Installed: Provide a description of the energy efficiency measures implemented over the last 5 years and the estimated energy and demand savings at the school site. If energy audits have been performed during the last five years, indicate who performed the study and describe the energy efficiency measures in each end-use category separately such as lighting, lighting control, HVAC, HVAC control and plug load measure.

Proposed Clean Energy Generation System Information

For each school site where the PV system is proposed, the LEAs must provide the proposed PV system information, including:

- Proposed PV System: Type of system (ground mount, carport, roof mount, and so forth) Describe where the PV is proposed on the building site, describe age and general condition of the location. Also describe the existing building structure and the structural

adequacy to support additional loads. Provide calculations where applicable to demonstrate that additional roof weight will not be detrimental to the building structure.

- PV System Production: Number of panels, PV system size (AC rated), an overall layout of proposed installation, inverter capacity, inverter conversion efficiency, system degradation rate, estimated annual production.
- PV System Savings: Energy cost savings, effective electricity rate to be paid to PV vendor and the electric price discount. PPA contractor must also provide the estimate of PV production as a percentage of latest year (fiscal or calendar) electricity use at the school site. If the LEA is using a time-of-use rate, an hourly simulation model for on-peak, mid-peak, and off-peak kWh production and time-of-use rates shall be used to calculate PV system cost savings. If the LEA plans to switch to a new rate schedule, perform cost-saving analysis based on the new rate schedule.

PPA Contract Information

For all proposed PPAs, provide documentation to comply with the following PPA Terms and Conditions as described in the Proposition 39 Guidelines:

1. Letter of Intent: If an LEA intends to use Proposition 39 funds to finance a clean energy project using a PPA, the LEA must include a commitment letter signed by the LEA authorized representative to indicate why the clean energy PPA project could not be implemented without the Proposition 39 grant contribution.
2. No Sole Source Agreement: PPA agreement shall not be awarded through a sole source process as required by Public Resources Code section 26235(c), which states, "A community college district or LEA shall not use a sole source process to award funds pursuant to this chapter. A community college district or LEA may use the best value criteria as defined in paragraph (1) of subdivision (c) of Section 20133 of the Public Contract Code to award funds pursuant to this chapter." (Note that Senate Bill 785 (Chapter 931, Statutes of 2014), adopted by the Legislature and signed into law by Governor Edmund G. Brown on September 30, 2014, repealed Section 20133 of Chapter 1 of Part 3 of Division 2 of the Public Contract Code and further amended the statute.) The LEA shall defer to their own procurement regulations and procedures, as long as they reflect applicable state and local laws and regulations and do not conflict with the minimum legal standards specified above.
3. A PPA clean generation project size shall be sized to reduce up to a maximum of 70 percent of the most recent calendar or fiscal year kWh energy consumption at the school site. The percentage of kWh generation displaced by the clean energy generation project shall be calculated based on the proposed PV system energy production.
4. The PV vendor shall provide either a document or a statement to address the following:
 - The PV vendor shall provide a performance guarantee ensuring at least 95 percent of estimated production over at least a five year period and must have a

performance and production guarantee for the life of the PPA term with an appropriate degradation rate.

- The Performance Guarantee shall include language that in the event actual production falls below the 95 percent threshold, the PV vendor will reimburse or compensate an LEA (at the applicable PPA rate) for the short fall.
- The PPA contractor shall provide a statement that it will be responsible for designing, installing, operating and maintaining the energy generation project during the contract terms. If a roof mounted PV system is proposed, the PPA contractor shall be responsible for the damage to the roof over at least a five year period.
- The PPA contract shall provide a statement that the energy generation project contractor shall be responsible for all required permits (DSA, CEQA, Fire Marshall, and so forth) and shall meet the current version of all applicable California Building Code including structural, electrical and fire protection.
- The PPA agreement shall define who owns the renewable energy certificates and include a statement, initialed by the LEA’s authorized representative, that the PPA vendor has informed the LEA of all greenhouse gas attributes and value benefits.

Energy Production and Cost Saving Summary for Energy Expenditure Plan Online Application

Energy production and cost savings of the proposed clean generation project must be calculated based on the provided sample PPA SIR calculation spreadsheet, or other PV simulation models using the same method. The calculation spreadsheet contains the instructions to use the tool, required data entry for online application, Proposition 39 contribution, estimated energy production and cost savings and life cycle analysis. The following table shows the required information for an energy expenditure plan that includes a request for approval of a PV project, which includes a PPA.

Energy Production and Cost Saving Summary for Energy Expenditure Plan Submission

Clean Energy Generation Size (kW AC)	Peak Demand Saving (kW)	Year 1 Electricity Production (kWh)	Term of the PPA Agreement	PV Production as % of LEA School Site Annual Electricity Use (%)	First Year PPA Electricity Cost (\$)	% Price Discount Offered on Price First Year (%)	PPA Electric Price Escalation (%)	NPV of Utility Cost Savings (\$)	NPV of Payment to PPA Vendor (\$)	NPV of Prop 39 Contribution (\$)	PPA SIR

Definitions:

1. PV Size (kW AC): Enter the alternating current (AC) power rating of the clean energy generation system proposed at the school.
2. Peak Demand Savings (kW): Enter the estimated peak demand savings based on the proposed system size and location.
3. Year 1 Production (kWh): Enter the estimated annual electricity production in kWh based on the proposed system size and location.
4. Term of the PPA Agreement: Enter the number of years of the PPA agreement between the PPA vendor and the LEA is for. For example, 15 years, 20 years, and so forth.
5. PV Production as Percentage of LEA School Site Annual Electricity Use (%): Enter percentage of the first year's (12-month) production estimate and the most recent 12-month annual electricity use of the site by dividing the former by the latter.
6. First Year PPA Electricity Cost (\$): This is the electricity cost paid by the LEA to the PPA developer. This is considered to be the measure cost for the LEA to obtain the electricity cost savings from the PPA. Any non-electricity costs paid by the LEA using Proposition 39 funds, such as project development costs, must be included.
7. % Price Discount Offered on Price First Year (%): Calculate the weighted average electricity price for last year's utility bills and the weighted average price paid by the LEA for the purchased electricity, then calculate and enter the percentage discount of the electricity price savings. For example, if the weighted average of electricity price is 20 cents and the weighted average price paid by the LEA for the purchased electricity is 16 cents. The difference between the two is 4 cents. To get the percentage price discount, divide 4 cents by 20 cents, and you will get 20 percent. In this example, enter 20 in this field.
8. PPA Electric Price Escalation (%): Enter the energy cost escalation rate that was agreed to in the PPA. The escalation rate should not exceed 3 percent nominal.
9. NPV of Utility Cost Savings (\$): NPV of the difference between the annual electricity cost paid to the utility immediately before and after the PPA agreement.
10. NPV of Cost Payment to PPA Vendor (\$): NPV of electricity cost paid to the PPA vendor over the term of the PPA agreement.
11. NPV of Proposition 39 Contribution (\$): NPV of total Proposition 39 contribution to this PPA agreement. Future year contribution shall be discounted to the current year's value.
12. PPA SIR: PPA SIR shall be calculated using the following equation:

$$\text{PPA SIR} = \frac{\text{NPV of LEA Utility Cost Savings}}{\text{NPV of LEA Electricity Cost Paid under PPA+NPV of P39 Contribution}}$$

Present value (NPV) calculation assumptions

- PPA Energy Escalation Rate = maximum up to 3% (nominal)
- Energy Cost Escalation Rate = 4% (nominal)

- Discount Rate = 5%
- Effective Useful Life (EUL) = up to 20 years
- Performance degradation Rate 0.7%. (if lower than 0.7%, a performance guaranty shall be provided in writing.)

Note: Where an LEA proposes PV installations at multiple sites, the PPA contractor must provide the above information for each school or site where PV is planned. The Proposition 39 Funding requested may be allocated across each site based on energy production estimated at each site.

APPENDIX A:

Examples of Backup Information to be Uploaded

Note: The Energy Commission has included this checklist for your convenience. Please use this checklist to ensure that you have uploaded all the necessary supporting documentation in Energy Expenditure Plan Online.

- Utility Data Release Authorization Form (CEC-12) – This needs to be submitted with the first energy expenditure plan submitted by the LEA
- Facility and Service Account Information Form (CEC-24) - This needs to be submitted with the first energy expenditure plan submitted by the LEA unless any changes to the number of facilities under its jurisdiction have occurred.
- Energy Audit (if applicable)
- Energy Survey (if applicable)
- Energy Savings Calculators (if applicable)
- Power Purchase Documentation (if applicable)
- Building Owner Certification to Transfer Energy Cost Savings to LEA (if applicable)

APPENDIX B: Frequently Asked Questions (FAQ)

Can an LEA still upload Form A and Form B spreadsheets even after Energy Expenditure Online has been launched?

No. On February 27, 2015, when Energy Expenditure Plan Online was launched and thereafter, LEAs can only submit their energy expenditure plans by keying in their project information into the online system. LEAs will still need to upload their backup documentation into the online system.

How many persons can register into Energy Expenditure Plan Online?

Only one person per LEA can register in Energy Expenditure Plan Online. However, the LEA registrant may provide their password to multiple persons as they think necessary.

Once Energy Expenditure Plan Online has been launched, can an LEA still use Version 5 of the energy savings calculator?

No. On February 27, 2015, when Energy Expenditure Plan Online was launched and thereafter, LEAs must use Version 6 of the energy savings calculator. If the LEA uses and uploads Version 5 of the calculator to the online system, the Energy Commission Project Manager will require the LEA to resubmit their energy expenditure plan using Version 6 of the calculators.

What type of information do we need to key into Energy Expenditure Plan Online? Is it similar to the information in Form A and Form B?

The information in the online system is very similar to information in the Form A and Form B spreadsheets. The Energy Planning & Training, Job Creation and Certifications tabs correspond to information in Form A. The Schools/Sites tab contains information that corresponds to information in Form B. In addition, there are several fields in Energy Expenditure Plan Online that were not included on Form A and Form B. Please refer to Chapter 2 for information on specific fields.

Can I open and edit the files that I have uploaded into the Supporting Documents section of Energy Expenditure Plan Online?

No. Documents that are uploaded into the Supporting Documents section cannot be opened or edited. To make edits to the uploaded documents, edit the version that is saved in your computer then re-upload the revised version. Newer files with the same file name as the one in the upload screen will automatically overwrite the older file.

The registration page does not include a list of security questions to choose from. What do I do?

The LEA registrant must type in a question they create. There is no list of security questions provided.

I used to be able to key in two Authorized Representatives and/or Project Manager names, phone numbers, and e-mail addresses. Can I still do that?

No. You can only enter the contact information for one Authorized Representative and one Project Manager.

We plan to make energy efficiency upgrades to our non-school facilities. How do we enter information for these non-school facilities?

For non-school facilities (e.g. administrative offices), in the Schools/Sites tab, select the “District Office” option in the drop-down box and proceed to enter the information.

I already submitted the previous version of the Utility Data Release Form. Do I have to submit this new version?

The Utility Data Release Authorization Form (CEC-12) is required to be submitted only with the first energy expenditure plan that an LEA submits to the Energy Commission. The Energy Commission does not require an LEA that has previously submitted a Utility Data Release Authorization Form to submit a copy of the new form. However, if the LEA’s utility requires an original signed copy of the new Utility Data Release Authorization Form, it is the LEA’s responsibility to sign and submit the original to the utility and a copy with the energy expenditure plan documents. It is not necessary for the LEA to submit a Facility and Service Account Information Form (CEC-24) unless there have been any changes to the number of facilities under their jurisdiction since the last energy expenditure plan was submitted (that is, facilities have closed or new facilities have opened.)

What do I do if I want to amend my EEP?

Contact your Energy Commission Project Manager. However, please note that the amendment process is still under development.