



Proposition 39: California Clean Energy Jobs Act- 2013 Program Implementation



*CEC Training Webinar
February 13, 2014*

AGENDA

- 1) **Proposition 39 Guidelines Overview**
- 2) **Energy Expenditure Plan Handbook Overview**
- 3) **Expenditure Plan General Form A**
- 4) **Expenditure Plan Project Summary Form B**
- 5) **Utility Data Release Authorization Form**
- 6) **Energy Savings Calculators**
- 7) **How to Submit (Upload Instructions)**
- 8) **Energy Related Resources for Schools**



PROPOSITION 39 DOCUMENTS

All documents are online now!

- Guidelines

<http://www.energy.ca.gov/efficiency/proposition39/index.html>

- Handbook, Forms A/B, Calculators, etc.

http://www.energy.ca.gov/efficiency/proposition39/ee_plans/index.html

- CA Department of Education (CDE)

<http://www.cde.ca.gov/fg/fo/r14/prop39cceja13rfa.asp>

- QUESTIONS?



(855) 380-8722 (Toll free in state)

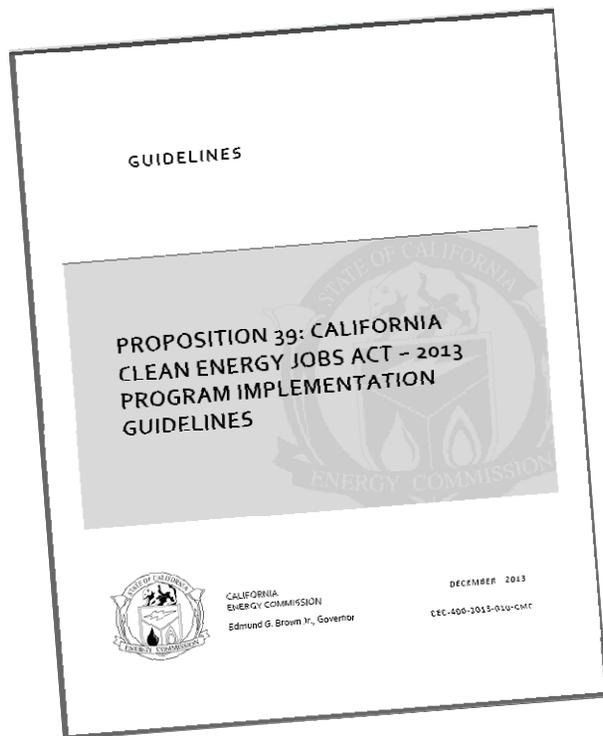
(916) 653-0392 (Out of state)

Prop39@energy.ca.gov

*Let's talk about
Proposition 39*



PROPOSITION 39 GUIDELINES OVERVIEW



- **General Overview**
- **Eligibility**
- **Award Allocations**
 - Minimum Funding Award Levels
 - Two-Year Combined Award Option
 - Energy Planning Funds Option
 - Large Energy Project Award Requirement
- **Eight (8) Step Process**



PROPOSITION 39 GUIDELINES OVERVIEW

General Overview

Chapter 1: Background and General Information

Chapter 2: Local Educational Agency Proposition 39
Award Program

Chapter 3: Additional Proposition 39 State Resources

Appendices



PROPOSITION 39 GUIDELINES OVERVIEW

Eligibility

- Eligible Projects: Energy efficiency measures and/or clean energy installations at a school site
- Eligible Applicants: LEAs: County Offices of Education, School Districts, Charter Schools and State Special Schools
 - All facilities within the LEA: School site facilities include: classrooms, LEA office facilities, auditoriums, multipurpose rooms, gymnasiums, cafeterias, kitchens, pools, and special purposes areas



PROPOSITION 39 GUIDELINES OVERVIEW

Eligibility *continued*

- LEAs in Leased Facilities
 - Cost-effectiveness criteria – in addition to SIR, each energy measure must have a simple payback either within the remaining period of the “lease agreement” or the remaining period of the “charter contract term” whichever is shorter



PROPOSITION 39 GUIDELINES OVERVIEW

Eligibility *continued*

- LEAs in Privately Owned Leased Facilities
 - Building Owner Written Certification to Transfer Energy Cost Savings to LEA if:
 - An LEA leases a privately owned facility or building that does not have a separate meter.
 - An LEA leases a privately owned facility or building, and the lease payment includes the utility cost.



PROPOSITION 39 GUIDELINES OVERVIEW

Award Allocations

Tier Levels	Average Daily Attendance Prior Year	Minimum Funding Awards
Tier 1	100 or fewer	\$15,000 plus FRPM
Tier 2	101-1,000	Based on prior year ADA or \$50,000 (whichever amount is larger) plus FRPM
Tier 3	1,001 to 1,999	Based on prior year ADA or \$100,000 (whichever amount is larger) plus FRPM
Tier 4	2,000 or more	Based on prior year ADA plus FRPM



PROPOSITION 39 GUIDELINES OVERVIEW

Award Allocations *continued*



California Department of Education's

Website:

<http://www.cde.ca.gov/fg/fo/r14/prop39ccej13rfa.asp>



PROPOSITION 39 GUIDELINES OVERVIEW

Two-Year Combined Award Option

- LEAs with 1,000 or fewer prior year ADA are eligible to receive both the current year and the following year funding in the current year
- LEAs selecting this option shall not receive a funding allocation in the year following the request



PROPOSITION 39 GUIDELINES OVERVIEW

Energy Planning Funding Reservation Option

- Option of requesting a portion of fiscal year 2013-2014 award now, without submitting an energy expenditure plan to the Energy Commission
- This option is available only for the fiscal year 2013-2014



PROPOSITION 39 GUIDELINES OVERVIEW

Planning Funding Reservation Option *continued*

- *Four Allowed Energy Planning Activities:*
 - Energy Audits and Energy Surveys
 - Prop. 39 Program Assistance
 - Hiring (or retaining) Energy Manager(s)
 - Energy-related Training for classified employees



*Energy Planning Activity Description
Guidelines – [Page 10](#)*



Table 2: Energy Planning Activities

Pre-Expenditure Plan Approved Activities	Description of Activity	Best Practices Cost Guidance
<p>American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) Level 2 Energy Audit plus SIR as defined by the guidelines.</p> <p>Energy Surveys & Data Analytics</p>	<p>An ASHRAE Level 2 energy audit shall review the past 12 months of utility billing data and calculations of energy use intensity (EUI) and a walk-through of the facility. The audits shall also provide a list of all energy efficiency measures recommended for implementation and shall include detailed costs for energy measures, energy savings calculations, and financial analysis of proposed energy efficiency measures. The financial analysis shall provide a comprehensive understanding of the financial benefits of implementing the specific energy efficiency measure recommendations and include a savings-to-investment ratio (SIR) according to the guidelines.</p> <p>Energy surveys and data analytics may be used as tools to identify opportunities for energy efficiency measures at LEA facilities, such as those listed in Exhibit B in the guidelines, for which an Energy Commission calculator may be used to determine energy savings.</p>	<p>\$0.15 - \$0.20 per gross square foot⁴</p> <p>\$0.02 - \$0.05 per gross square foot</p>
<p>Proposition 39 Program Assistance</p>	<p>If an LEA needs assistance completing the Proposition 39 program requirements, it may use part of the award for Proposition 39 program assistance activities. For example, LEAs are required to provide electric and gas usage/billing data, complete benchmarking, submit an energy expenditure plan(s), and complete reporting requirements necessary to receive eligible energy project funding under this program. Energy planning funds requested for Proposition 39 program assistance activities can be used to complete any of the required Proposition 39 program steps.</p>	
<p>Energy Manager</p>	<p>An energy manager's responsibility is to improve energy efficiency by evaluating the school's energy use and implementing energy policies, strategies, programs, and energy measures. Energy managers may review related work that could improve health and safety or classroom conditions. Typical work responsibilities include, but are not limited to, evaluating and monitoring current energy usage, identifying energy saving opportunities in existing facilities, ensuring accurate records are maintained, providing technical energy efficiency and conservation services, and managing all stages of energy project implementation.</p>	
<p>Energy-Related Training</p>	<p>Energy efficiency training of classified school employees.</p>	

PROPOSITION 39 GUIDELINES OVERVIEW

Additional Funding Opportunities for Energy Manager(s) and Energy-Related Training

- For years 2-5 of the Prop 39 Program:
 - Energy Manager – Up to 10% of award year
 - Energy-Related Training – Up to 2% of award year



PROPOSITION 39 GUIDELINES OVERVIEW

Large Eligible Energy Project Award Requirements (Tier 4 Awards)

- LEAs that receive an award of more than \$1 million in any one fiscal year, use at least 50 percent on a large project
- *A large eligible energy project* is defined as a group of energy efficiency measures combined for a project cost totaling more than \$250,000
 - The intent of the law: LEAs to implement large energy projects at an individual school sites



PROPOSITION 39 GUIDELINES OVERVIEW

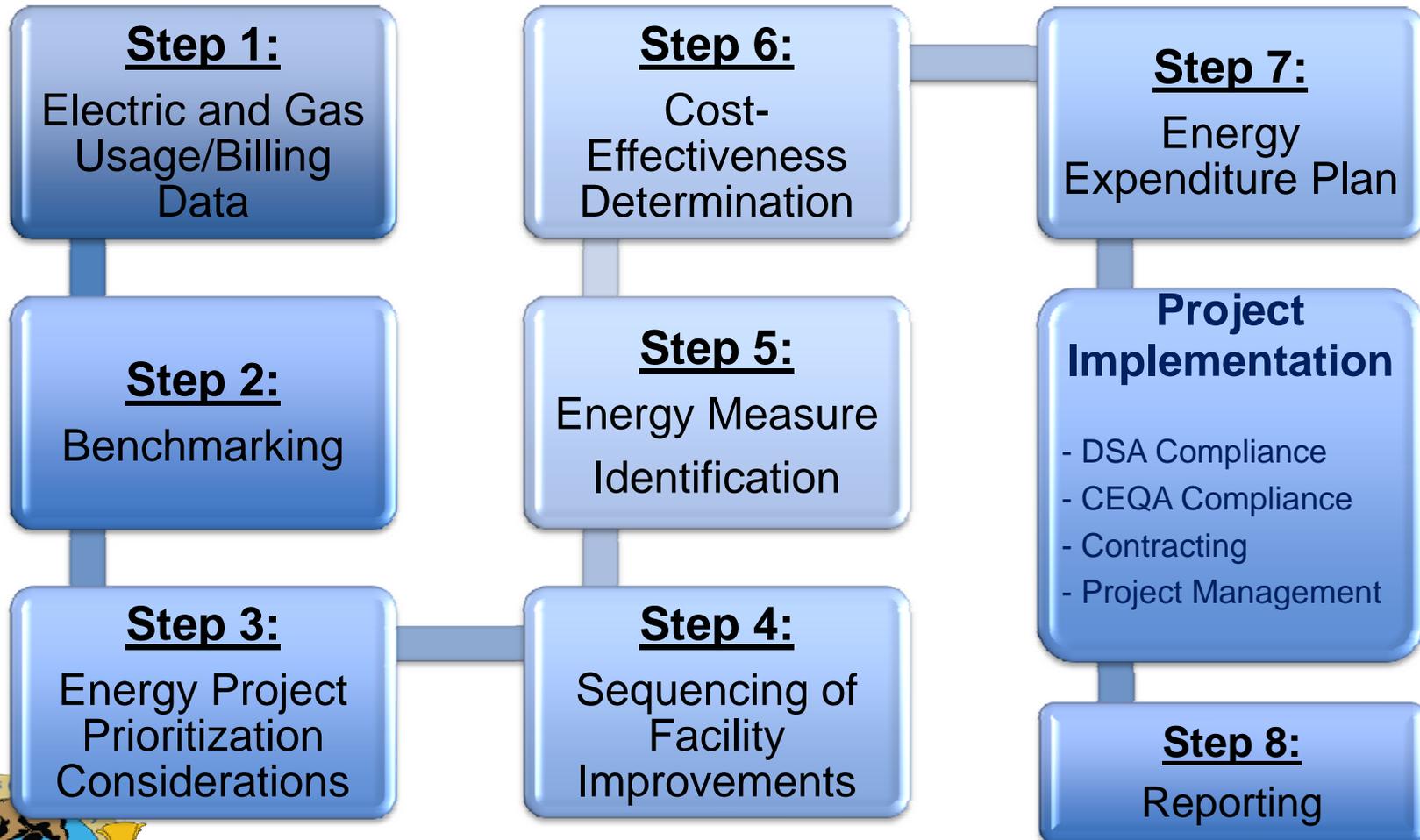
Retroactive Funding Rules

- Energy Planning Activity Awards
 - Prop 39 funding may be used to pay for Planning Activities occurring on or after July 1, 2013
- Energy Project Installations
 - Prop 39 funding may be used to pay for Energy Projects installed on or after December 19, 2013
 - Contingent on approval in an Energy Expenditure Plan application – Risk is on the LEA



PROPOSITION 39 GUIDELINES OVERVIEW

8 STEP OVERVIEW



QUESTIONS...

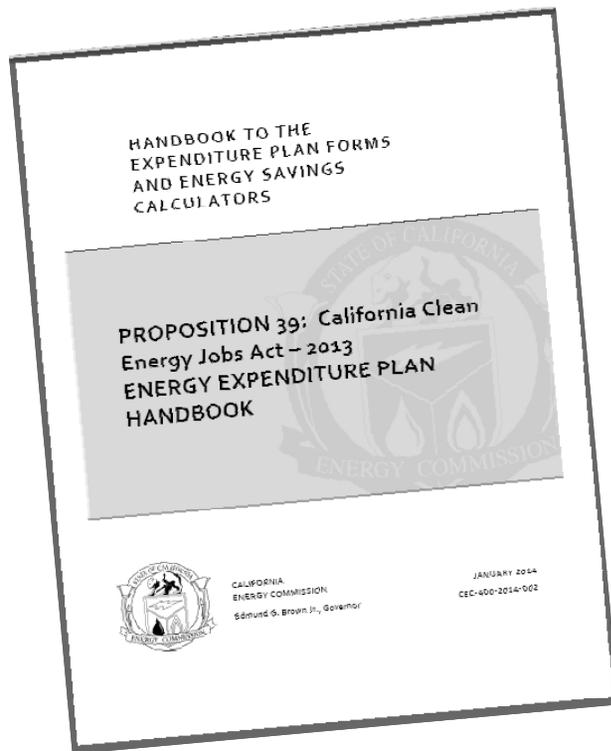
About Proposition 39?



Let's discuss the Energy Expenditure Handbook



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW



- **General Overview**
- **Energy Expenditure Plans**
 - What is it
 - Who may submit
 - What to include
 - When to submit
 - Where to submit
- **What to Compile Before Completing Form A and Form B**



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

General Overview

Chapter 1: Energy Expenditure Plan

Chapter 2: Instructions for Expenditure Plan General
Form A

Chapter 3: Instructions for Expenditure Plan Project
Summary Form B



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

General Overview *continued*

Chapter 4: Instructions for the Utility Data
Release Authorization Form

Chapter 5: Instructions for the Energy Savings
Calculator

Appendix A: Energy Expenditure Plan Checklist



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

Energy Expenditure Plan

- Application package an LEA submits electronically to request Prop 39 program award funds to implement eligible energy projects

The image displays three overlapping forms from the California Energy Commission. The top-left form is Form 8, 'Application Form', which includes sections for 'Project Information', 'Financial Information', and 'Project Description'. The middle form is Form 9, 'Application Form', which includes a table for 'Project Information' with columns for 'Project Name', 'Project Type', 'Project Location', 'Project Start Date', 'Project End Date', 'Project Status', 'Project Funding Source', 'Project Funding Amount', 'Project Funding Type', 'Project Funding Period', 'Project Funding Start Date', 'Project Funding End Date', 'Project Funding Status', and 'Project Funding Amount'. The bottom-right form is Form 10, 'Data Release Authorization Form', which includes sections for 'Project Information', 'Financial Information', and 'Project Description'.



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

Who may submit an Energy Expenditure Plan?

- LEAs who have been appropriated Prop 39 award funds to implement eligible energy projects

Schedule of the Total Award Allocations for Fiscal Year 2013-14							
County Name	County Code	District Code	School Code	Charter Number	Charter Fund Type	Local Educational Agency (or Authorizing Entity)	School Name
Alameda	01	10017	0000000			Alameda Co. Office of Education	
Alameda	01	10017	0109835	0728	D	Alameda Co. Office of Education	FAME Public Charter
Alameda	01	10017	0112807	0811	D	Alameda Co. Office of Education	Envision Academy for Arts & Technology
Alameda	01	10017	0118489	1049	D	Alameda Co. Office of Education	Aspire California College Preparatory Academy
Alameda	01	10017	0123968	1284	D	Alameda Co. Office of Education	Community School for Creative Education
Alameda	01	10017	0124172	1296	D	Alameda Co. Office of Education	Yu Ming Charter
Alameda	01	10017	0125567	1383	D	Alameda Co. Office of Education	Urban Montessori Charter
Alameda	01	10017	6001788	0740	D	Alameda Co. Office of Education	Cox Academy
Alameda	01	10017	6002000	1464	D	Alameda Co. Office of Education	Lazear Charter Academy
Alameda	01	31809	0000000			California School for the Blind (State Special Sch	
Alameda	01	31817	0000000			California School for the Deaf-Fremont (State Spec	
Alameda	01	61119	0000000			Alameda Unified	
Alameda	01	61119	0119222	1066	D	Alameda Unified	Nea Community Learning Center
Alameda	01	61119	0122085	1181	D	Alameda Unified	Academy of Alameda
Alameda	01	61119	0130609	0352	D	Alameda Unified	Alameda Community Learning Center
Alameda	01	61119	0130625	0398	D	Alameda Unified	Bay Area School of Enterprise
Alameda	01	61127	0000000			Albany City Unified	
Alameda	01	61143	0000000			Berkeley Unified	
Alameda	01	61143	0122689	1254	D	Berkeley Unified	REALM Charter Middle
Alameda	01	61143	0122697	1255	D	Berkeley Unified	REALM Charter High
Alameda	01	61150	0000000			Castro Valley Unified	
Alameda	01	61168	0000000			Emery Unified	
Alameda	01	61176	0000000			Fremont Unified	
Alameda	01	61176	0130534		L	Fremont Unified	Circle of Independent Learning
Alameda	01	61192	0000000			Hayward Unified	
Alameda	01	61192	0108670	0684	D	Hayward Unified	Leadership Public Schools - Hayward
Alameda	01	61192	0113902	0836	D	Hayward Unified	Impact Academy of Arts & Technology
Alameda	01	61192	0119248	1067	D	Hayward Unified	Golden Oak Montessori of Hayward
Alameda	01	61200	0000000			Livermore Valley Joint Unified	
Alameda	01	61200	0107839	1565	D	Livermore Valley Joint Unified	Livermore Valley Charter
Alameda	01	61219	0000000			Mountain House Elementary	



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

What to include in the Energy Expenditure Plan

- Expenditure Plan General Form A in Microsoft Excel® - only one Form A per Energy Expenditure Plan
- Expenditure Plan Project Summary Form B in Microsoft Excel® - multiple Form Bs depending on number of schools or sites included in the Energy Expenditure Plan
- Utility Data Release Authorization Form in PDF



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

What to include in the Energy Expenditure Plan *cont.*

- Project Back-up Documentation (e.g. energy savings calculator, energy surveys and audits, building owner certification, etc.)

Appendix A: Energy Expenditure Plan [Checklist](#) has been provided in the handbook for your convenience. Please use this checklist to ensure that you have submitted a complete Energy Expenditure Plan



APPENDIX A: Energy Expenditure Plan Checklist

Note: The Energy Commission has included this checklist for your convenience. Please use this checklist to ensure that you have submitted a complete Energy Expenditure Plan.

- Expenditure Plan General Form A (Excel file)
- Expenditure Plan Project Summary Form B (Excel file) –
Note that multiple Form B files may be included based
on the number of schools or sites included in the
expenditure plan
- Utility Data Release Authorization Form
- Energy Audit (if applicable)
- Energy Survey (if applicable)
- Energy Calculators (if applicable)
- Building Owner Certification to Transfer Energy Cost
Savings to LEA (if applicable)

ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

When to submit

- The Energy Commission is now accepting Energy Expenditure Plans!
- LEAs can only submit one Energy Expenditure Plan per fiscal year
- LEA can submit every year or combine multi-year awards into a single Energy Expenditure Plan



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

Where to submit

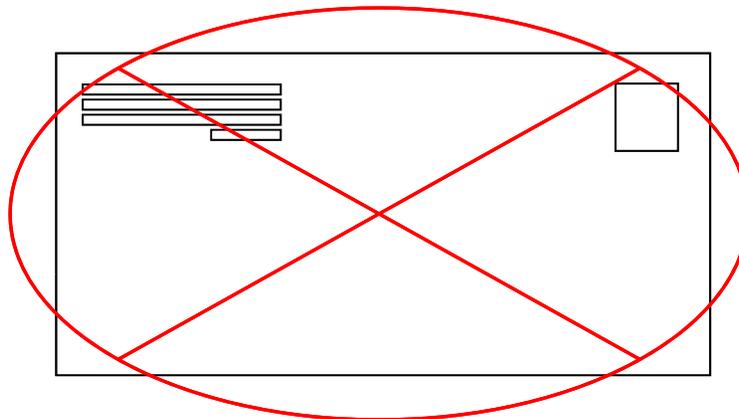
- On January 31, 2014, a “welcome” email was sent to primary and secondary LEA contacts listed in the California School Directory
- The email provided a link to the Energy Commission’s *Proposition 39 Energy Expenditure Plan System*



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

Where to submit *continued*

- Only Energy Expenditure Plans uploaded via the link in the “welcome” e-mail will be accepted
- **No Energy Expenditure Plan will be accepted by mail, e-mail, fax, or courier delivery**



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

What documents and information to compile before completing Form A and Form B

- Energy surveys and energy audits
 - Descriptions of existing and proposed equipment
 - Energy and cost savings
 - Proposed budget for project cost
- Energy savings calculators to calculate savings for simple eligible energy projects



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

What documents and information to compile before completing Form A and Form B *continued*

- Electric and gas utility bills from the previous fiscal year for all schools or sites where eligible energy projects will be implemented
- A financial breakdown of how planning funds were budgeted and spent



ENERGY EXPENDITURE PLAN HANDBOOK OVERVIEW

What documents and information to compile before completing Form A and Form B *continued*

- LEA entity information
 - CDS code
 - LEA Project Manager contact information
 - LEA Authorized Representative contact information
- Job creation estimates



QUESTIONS...

About the Handbook?



Let's talk about Expenditure Plan General Form A



EXPENDITURE PLAN GENERAL FORM A

	Grant Amount Requested: \$ _____
Fiscal Year: _____	Grant Balance Available: _____
Expenditure Plan Submittal Option: _____	
1. Applicant Information	
Local Education Agency (LEA) Name: _____	Tier: _____
LEA CDS Code : _____	City: _____
Mailing Address: _____	Zip Code: _____
LEA Authorized Representative: _____	Phone: _____
Title: _____	E-mail: _____
Project Manager: _____	Phone: _____
Title: _____	E-mail: _____

Section 1

- LEA Authorized Representative
 - An LEA employee with the authority to execute, direct, or delegate the implementation of projects
- Grant Amount Requested (automatically calculated)
 - Section 3 & Section 4



- Grant Balance Available
 - <http://www.cde.ca.gov/fg/fo/r14/prop39cceja13rfa.asp>
- LEA CDS Code

EXPENDITURE PLAN GENERAL FORM A

2. Energy Planning Reservation Information <i>(only available for fiscal year 2013-2014 award)</i>	
Did you request Energy Planning Funds? <i>(If no, move on to next section)</i> _____	
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: _____
Totals: \$ _____ -	\$ _____ -

Section 2

- Did you request Energy Planning Funds?
 - Planning funds were requested directly from the California Department of Education

- Budgeted Amounts
 - Left column

- Amount Spent
 - Right column



EXPENDITURE PLAN GENERAL FORM A

3. 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 39 funds for energy related training costs? _____	Amount requesting for Training: _____

Section 3

- Energy Manager
 - Maximum 10% of grant amount
- Training
 - Maximum 2% of grant amount



EXPENDITURE PLAN GENERAL FORM A

4. Summary of Schools/Sites
 List all schools/sites where Proposition 39 funds from this Expenditure Plan will be used. Each school/site listed must have a Expenditure Plan Project Summary Form B completed and attached. If more than 20 sites are identified please use Additional School Sites Tab as necessary.

Estimated Project Cost				Estimated Project Cost			
School/Site	CDS #	Total Project Cost	Proposition 39 Share	School/Site	CDS #	Total Project Cost	Proposition 39 Share
1				11			
2				12			
3				13			
4				14			
5				15			
6				16			
7				17			
8				18			
9				19			
10				20			
Estimated Total:						\$	\$

Section 4

- Section used to calculate Grant Amount Requested
- Total Project Cost
 - Found in Form B, Section 6
- Proposition 39 Share
 - Found in Form B, Section 6
- Addition School Sites (tab)
 - If necessary enter additional sites in this tab



EXPENDITURE PLAN GENERAL FORM A

5. Job Creation Estimates

Please fill in the corresponding budget amounts for each applicable type of project which the Proposition 39 grant funds will be used.

Type of Project	Budget	Estimated Direct Job-Years Created
Energy Efficiency	_____	0
Renewable Energy	_____	0
Clean Advanced Distributed Energy	_____	0
Total:		0

Please list any state-certified apprenticeship programs being used:

Apprenticeship Information	Budget	Estimated Apprenticeship Job-Years Created
Apprenticeships	_____	0

Other Trainee Position Title	(Please use Additional Trainees tab as necessary)	Estimated Other Trainee Jobs Created	(Please use Additional Trainees tab as necessary)
_____		_____	
_____		_____	
_____		_____	
Total:		0	

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

Section 5

- Budget
 - Estimated budget for specified activity
- Other Training Positions
- Estimated Other Trainee Jobs Created



- Additional Trainee Positions (tab)
 - If necessary enter additional trainee information in this tab

EXPENDITURE PLAN GENERAL FORM A

6. Self-Certifications

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 that 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 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 26206(e) and 26240(g)).

The LEA commits 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

TYPE Name of Authorized Representative: _____ /s/ _____ Date: _____

Version 1.0

Section 6

- 8 Self-Certification items
- TYPE Name of Authorized Representative
 - This should match the employee named in Section 1



Grant Amount Requested: \$ 139,022.00
 Grant Balance Available: \$ 212,009.00

Fiscal Year 2013-14
 Expenditure Plan Submittal Option: _____ Annual Award Energy Expenditure Plan

1. Applicant Information

Local Education Agency (LEA) Name: QRST Unified School District Tier: 2
 LEA CDS Code: 27765400000000
 Mailing Address: 1234 ABCD St City: Cityscape
 Zip Code: 12345.00
 LEA Authorized Representative: John Smith Phone: (555) 555-6543
 Title: Superintendent E-mail: J.Smith@QRST.com
 Project Manager: Mary Brown Phone: (555) 555-6544
 Title: Maintenance Coordinator E-mail: M.Brown@QRST.com

2. Energy Planning Reservation Information (only available for fiscal year 2013-2014 award)

Did you request Energy Planning Funds? (If no, move on to next section) No
 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: _____
 Totals: \$ - \$ -

3. Energy Manager and Training

Are you hiring an Energy Manager with funds requested in this Expenditure Plan? No Amount requesting for Energy Manager: _____
 Are you using Proposition 39 funds for energy related training costs? No Amount requesting for Training: _____

4. Summary of Schools/Sites

List all schools/sites where Proposition 39 funds from this Expenditure Plan will be used. Each school/site listed must have a Expenditure Plan Project Summary Form B completed and attached. If more than 20 sites are identified please use Additional School Sites Tab as necessary.

Estimated Project Cost				Estimated Project Cost			
School/Site	CDS #	Total Project Cost	Proposition 39 Share	School/Site	CDS #	Total Project Cost	Proposition 39 Share
1 Apple Elementary School	27765400004561	\$ 34,301.00	\$ 32,518.00	11			
2 Blueberry Elementary School	27765400055555	\$ 1,017.00	\$ 959.00	12			
3 Cashew Elementary School	27765400654555	\$ 34,486.00	\$ 32,757.00	13			
4 Date Street Middle School	27765405454545	\$ 12,406.00	\$ 11,206.00	14			
5 Espresso High School	27765400000321	\$ 41,950.00	\$ 36,468.00	15			
6 Fudge Education Center	27765400000000	\$ 10,343.00	\$ 9,585.00	16			
7 Guava Elementary School	27765400004566	\$ 16,691.00	\$ 15,529.00	17			
8				18			
9				19			
10				20			
Estimated Total:						\$ 151,194.00	\$ 139,022.00

5. Job Creation Estimates

Please fill in the corresponding budget amounts for each applicable type of project which the Proposition 39 grant funds will be used.

Type of Project	Budget	Estimated Direct Job-Years Created
Energy Efficiency	\$ <u>139,022.00</u>	<u>0.779</u>
Renewable Energy	_____	<u>0</u>
Clean Advanced Distributed Energy	_____	<u>0</u>
Total:		<u>0.779</u>

Please list any state-certified apprenticeship programs being used:
 There is a new trainee.

Apprenticeship Information	Budget	Estimated Apprenticeship Job-Years Created
Apprenticeships	_____	<u>0</u>

Other Trainee Position Title (Please use Additional Trainees tab as necessary)

Other Trainee Position Title	Estimated Other Trainee Jobs Created (Please use Additional Trainees tab as necessary)
New Trainee	<u>2</u>
_____	_____
_____	_____
_____	_____
Total:	<u>2</u>

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

6. Self-Certifications

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

TYPE Name of Authorized Representative: John Smith

Date: 2/10/2014

*Let's talk about Expenditure
Plan Project Summary
Form B*



EXPENDITURE PLAN PROJECT SUMMARY FORM B

Local Education Agency (LEA) Name: _____	
LEA CDS Code: _____	
1. School or Site Information	
School/Site Name: _____	Estimated Project Start Date: _____
School/Site CDS Code: _____	Estimated Project Completion Date: _____
School/Site Mailing Address: _____	City: _____ Zip Code: _____

Section 1

- LEA CDS Code
 - The LEA CDS Code entered in Form A, Section 1
- School/Site CDS Code



EXPENDITURE PLAN PROJECT SUMMARY FORM B

2. Benchmarking (Provide the following information from the previous fiscal year utility bills for the entire school/site)

Square Footage of School/Site: _____	Electric Utility: _____	Gas Utility: _____																		
Average Peak Demand (kW): _____	Electric Utility Account #: _____	Gas Utility Account #: _____																		
Total Annual Electric Use (kWh): _____	Energy Bill Fiscal Year: _____																			
Total Annual Electric Charges (\$): _____	Reminder: If the School/Site includes leased facilities, please include Building Owner Certification in backup documentation.																			
Total Annual Gas Use (therms): _____	<table border="1"> <thead> <tr> <th colspan="3">Energy Use Intensity Calculator</th> </tr> <tr> <th>Electricity</th> <th>Natural Gas</th> <th>Other Fuels</th> </tr> </thead> <tbody> <tr> <td>W/SF</td> <td>Therms/SF</td> <td>Gals/SF</td> </tr> <tr> <td>kWh/SF</td> <td>Cost/SF</td> <td>Cost/SF</td> </tr> <tr> <td>Cost/SF</td> <td></td> <td></td> </tr> <tr> <td>Energy Costs/\$/SF/Year:</td> <td colspan="2">Energy Use(Kbtu)/SF/Year:</td> </tr> </tbody> </table>		Energy Use Intensity Calculator			Electricity	Natural Gas	Other Fuels	W/SF	Therms/SF	Gals/SF	kWh/SF	Cost/SF	Cost/SF	Cost/SF			Energy Costs/\$/SF/Year:	Energy Use(Kbtu)/SF/Year:	
Energy Use Intensity Calculator																				
Electricity	Natural Gas	Other Fuels																		
W/SF	Therms/SF	Gals/SF																		
kWh/SF	Cost/SF	Cost/SF																		
Cost/SF																				
Energy Costs/\$/SF/Year:	Energy Use(Kbtu)/SF/Year:																			
Total Annual Gas Charges (\$): _____																				
<i>Other Fuels</i>																				
Total Annual Propane Use (gals): _____																				
Total Annual Propane Charges (\$): _____																				
Total Annual Fuel Oil Use (gals): _____																				
Total Annual Fuel Oil Charges (\$): _____																				

Section 2

- Multiple Meters

- If multiple meters service a site than billing information should be consolidated



- Building Owner Certification

- The building owner certification is only required if the facility is privately owned or leased

EXPENDITURE PLAN PROJECT SUMMARY FORM B

4. Energy Efficiency Narrative Description

Please provide a narrative describing existing conditions, energy efficiency measures, and how these were prioritized. If a photovoltaic measure is being proposed on the site, please provide a description for why the site is a good candidate for a photovoltaic system.

Section 4

- Energy Efficiency Narrative Description
 - Include a description of the energy efficiency measures that have previously been implemented at the site, energy efficiency plan, or justification for solar projects



EXPENDITURE PLAN PROJECT SUMMARY FORM B

5. Photovoltaic Measure							
Size (kW AC)	Demand Savings (kW)	Year 1 Production (kWh)	Year 1 Energy Cost Savings (\$)	Inverter Efficiency (%)	Measure Cost (\$)	Rebates & Grants (\$)	Measure SIR

Section 5

- Size (kW AC)
 - Please site size based on AC rating



EXPENDITURE PLAN PROJECT SUMMARY FORM B

6. Site Project Summary						
Total Demand Savings	-	Total Annual Fuel Oil Savings	-	Total Prop 39 Share	\$ -	Savings-to-Investment Ratio (SIR)
Total Annual Electric Savings	-	Total Annual Cost Savings	\$ -			
Total Annual Natural Gas Savings	-	Total Project Cost	\$ -			
Total Annual Propane Savings	-	Total Rebates	\$ -			
						Version 1.0

Section 6

- Total Project Cost
 - Used in Form A Section 4
- Total Prop 39 Share
 - Used in Form A Section 4



- Savings-to-Investment Ratio (SIR)
 - Must be 1.05 or greater

QUESTIONS...

About Form A or Form B?



*Let's talk about the Data
Release Authorization Form*



UTILITY DATA RELEASE AUTHORIZATION FORM

Requirement

- Public Resources Code Section 26240(a) states, “In order to later quantify the costs and benefits of funded projects, an entity that receives funds from the Job Creation Fund shall authorize its local electric and gas utilities to provide 12 months of past and ongoing usage and billing records at the school facility site level to the Energy Commission.”



UTILITY DATA RELEASE AUTHORIZATION FORM

Authorization Form

- LEAs must identify all electric and natural gas accounts for **all** of its schools and facilities and provide a signed utility data release form for each utility provider allowing the Energy Commission to access both historical (the past 12 months) and future utility billing data through 2023
- LEAs only need to submit the Utility Data Release Authorization Form(s) once, which is part of their first Energy Expenditure Plan submission



- Energy Commission will work directly with the Utilities to transfer the LEA's energy usage data



AUTHORIZATION TO RELEASE CUSTOMER INFORMATION TO THE CALIFORNIA ENERGY COMMISSION ON A CUSTOMER'S BEHALF FOR PROPOSITION 39 IMPLEMENTATION ONLY

THIS IS A LEGALLY BINDING DOCUMENT PLEASE READ IT CAREFULLY

(Please Print or Type)

I, _____ am the authorized representative of
NAME and TITLE (IF APPLICABLE)

NAME OF CUSTOMER OF RECORD (Customer), which has the following mailing address:

MAILING ADDRESS CITY STATE ZIP, and do hereby authorize

[UTILITY NAME], hereafter referred to as "Utility", to release the historic and future electric and/or gas service usage data (as applicable) identified on the document entitled *School Site Individual Meter Data Requirements for Proposition 39 Funding Release*, as posted on the California Energy Commission (Energy Commission) Proposition 39 website, from all meters providing electric and gas service or services at the addresses and respective accounts and service accounts referenced below, to the Energy Commission, in order to meet the regulations and compliance requirements implementing Proposition 39 (adopted by voters November 6, 2012), Senate Bill 73 (Statutes 2013, Chapter 29, Sections 2-3) and Senate Bill 97 (Statutes 2013, Chapter 357). Under those regulations and requirements, Customer is responsible for providing an authorization to the Utility to release historic and future electric and/or natural gas usage data for all schools and facilities under Customer's jurisdiction to the Energy Commission. Specifically, Public Resources Code, Section 26240(a) states, "In order to later quantify the costs and benefits of funded projects, an entity that receives funds from the Job Creation Fund shall authorize its local electric and gas utilities to provide 12 months of past and ongoing usage and billing records at the school facility site level to the Energy Commission."

I understand and accept that any related release of customer information can be made part of the public record unless the Energy Commission has designated the information as confidential pursuant to California Code of Regulations, Title 20, Sections 2501-2510.

The Utility and the Energy Commission shall use best available practices to make the required data transmittals in an agreed upon electronic format via electronic mail as specified by the Energy Commission.

The historic data to be provided to the Energy Commission under this authorization is for the July 1-June 30 fiscal year (FY) that immediately precedes the FY in which the Customer submits an Energy Expenditure Plan (Plan) to the Energy Commission (e.g., if the Plan is submitted in July 1, 2014-June 30, 2015 FY, the historic data is for July 1, 2013-June 30, 2014). This authorization provides for future usage data to be provided to the Energy Commission for each FY through 2023 no later than December 31 of each calendar year in which the FY ends.

I, _____ (print or type the name of Customer or authorized signatory for Customer), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer listed at the top of this form and that I have the authority to contractually and financially bind the Customer. I understand that Utility reserves the right to verify any authorization request submitted before releasing information or taking any action pursuant to this verification. I authorize Utility to release the requested information on the account(s) or service account(s) identified below to the Energy Commission and I hereby release, hold harmless, defend and indemnify (i) Utility and its officers, agents and employees from any and all liability, claims, demands, causes of action, damages or expenses arising from or related to the release of the historic and future usage data made in accordance with and pursuant to this authorization; and (ii) the Energy Commission and the State of California and their respective officers, agents and employees from any and all liability, claims, demands, causes of action, damages or expenses arising from or related to the use, maintenance and disclosure (publicly or otherwise) of historic and future usage data that occurs in accordance with and pursuant to this authorization.

AUTHORIZED CUSTOMER SIGNATURE

TELEPHONE NUMBER

Executed this _____ day of _____ at _____
MONTH YEAR CITY AND STATE WHERE EXECUTED



ACCOUNTS / SERVICE ACCOUNTS INCLUDED IN THIS AUTHORIZATION

CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER
CDS or CHARTER SCHOOL NUMBER	ACCOUNT / SERVICE ADDRESS	CITY	ACCOUNT/SERVICE ACCOUNT NUMBER

(Please list additional accounts on a separate sheet and attach it to this form)

UTILITY DATA RELEASE AUTHORIZATION FORM

- Utility Data Release Authorization Form(s) must be printed, signed by the LEA authorized representative, then scanned and uploaded
- LEA must forward the original signed Utility Data Release Authorization Form(s) to the respective utility providers
- Utility providers transfers data annually to Energy Commission on December 31st

1 st Energy Expenditure Plan Submission Period	1st Date Utilities Required to Report to Energy Commission	Historic Utility Billing Data Reporting Period	Future Utility Billing Data Reporting Period
1/1/2014 – 6/30/2014	12/31/2014	7/1/2012 – 6/30/13	7/1/2013 – 6/30/23
7/1/2014 – 6/30/2015	12/31/2015	7/1/2013 – 6/30/14	7/1/2014 – 6/30/23
7/1/2015 – 6/30/2016	12/31/2016	7/1/2014 – 6/30/15	7/1/2015 – 6/30/23
7/1/2016 – 6/30/2017	12/31/2017	7/1/2015 – 6/30/16	7/1/2016 – 6/30/23
7/1/2017 – 6/30/2018	12/31/2018	7/1/2016 – 6/30/17	7/1/2017 – 6/30/23



Let's talk about the Energy Savings Calculators



ENERGY SAVINGS CALCULATORS

- LEAs can use Energy Savings Calculator Tool instead of consultant's energy audit to apply for P39 grants
- The Energy Savings Calculators are a tool to assist LEAs to benchmark and to calculate energy savings
- The calculator tool includes **1 Benchmarking tool, 10 lighting measures, 8 HVAC measures, 2 plug load measures and one PV measure** calculators and these calculators cover over 75% of the recommendations in comprehensive studies
- The energy impacts used in the calculator for lighting and HVAC measures were derived from the Database for Energy Efficiency Resources (DEER). Interactive effects for savings are included in the energy savings calculator



ENERGY SAVINGS CALCULATORS

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 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



ENERGY SAVINGS CALCULATORS

Where can I get the calculator tool?

- The calculator tool can be downloaded from CEC Prop 39 website:

http://www.energy.ca.gov/efficiency/proposition39/ee_plans/index.html



ENERGY SAVINGS CALCULATORS

- Only answer the questions highlighted in yellow, the tool will generate the energy savings
- LEA shall provide the energy savings results on Form B and submit the calculator as back up document
- LEA must use the calculator tool for each school. Do not combine measures from different schools or sites
- LEA must submit the entire calculator tool even the school only intends to apply for funding for one measure
- Energy savings is calculated based on the energy cost entered in the benchmarking tab. Without this utility use data, the calculators will not work



ENERGY SAVINGS CALCULATORS

Benchmarking Calculator

Benchmarking Calculator							
School Information							
School Name	John Kelly Elementary						
School CDS Code	33736769011396						
Mailing Address	86136 Center Street, Thermal, CA						
Electric Utility:	Imperial Irrigation District	PG&E or SCE etc.					
Gas Utility:	SoCal Gas						
Billing Period (Fiscal Year)	2,013	Fiscal year					
Total Square Footage of School	63,894						
		Energy Use Intensity (EUI) Calculator					
		Electricity	Natural Gas	Other Fuels			
		0.00 W/SF	0.06 Therms/SF/Yr	-	Propane gal/SF/Yr		
		7.32 kWh/SF/Yr	\$ 0.07 Gas Cost/SF/Yr	-	Fuel Oil gal/SF/Yr		
		\$ 0.96 Cost/SF/Yr		\$ -	Fuel Cost/SF/Yr		
		Energy Costs/SF/Year: \$ 1.03		Energy EUI(Kbtu)/SF/Year: 84.1			
Electricity							
Average Maximum Demand (kW):	0						
Total Annual Electric Use (kWh):	467660						
Total Annual Electric Charges (\$):	61552						
Natural Gas							
Total Annual Natural Gas Use (therms):	3651						
Total Annual Gas Charges (\$):	4167						
Other Fuels (if applicable)							
Total Annual Propane Use(gals):	0	Average Cost					
Total Annual Propane Charges(\$):	0	Electricity	\$ 0.132	\$/kWh			
		Natural Gas	1.1413311	\$/therm			
Total Annual Fuel Oil Use(gals):	0	Propane	0.0	\$/gal			
Total Annual Fuel Oil Costs(\$):	0	Fuel Oil	0.0	\$/gal			



ENERGY SAVINGS CALCULATORS

Utility Data

- Some small schools' electric bills do not have kW demand, enter 0, otherwise enter the average of maximum demand
- If multiple fuels are used, enter quantity for primary fuel and enter quantity of secondary fuel in a footnote
- If a school has a PV system, LEA must include PV kWh production in electricity use data field
- If a school buys electricity or natural gas from a 3rd party supplier, enter the sum of commodity (from 3rd party) and transportation cost (from PG&E) into cost field
- If a school leases a building and has no electric or gas bills, talk to building owner to find the information



ENERGY SAVINGS CALCULATORS

Lighting Example

ECM 2	Replace incandescent light with LED light	Fill in your answers	Energy Savings Summary			
Measure 2	Quantity of incandescent bulbs to be replaced with LED lights?	10	This measure saves	0.10 kW peak demand		
	What is the total wattage of all new LED lamps?	180	and	957 kWh energy use.		
	What is the total installed cost for this measure?	\$ 120	and	-5.8 therms natural gas		
	What is the utility rebate for this measure?	0	or	0.0 gallons of	NA	
			or	\$ 140.8 energy cost annually.		
			Simple Payback is	0.9 years.		
			Saving to Investment Ratio	16.76		



ENERGY SAVINGS CALCULATORS

Lighting Example *continued*

- LEA needs to total the LED lights to be installed
- Enter the quantity, total LED wattage and total cost

Quantity	Incandescent	LED	Cost
5	60 W	15 W	\$ 60
5	75 W	21 W	\$ 60
10	270 W	180W	\$ 120



ENERGY SAVINGS CALCULATORS

Classroom HVAC Example

ECM 11	Replace old packaged/split HVAC unit with high efficiency HVAC	Fill in your answers	Energy Savings Summary			
	This calculator only applies to AC up to 65KBtu/hr or 5.4 tons					
	Quantity of AC to be replaced with SEER 13 unit?	1			This project saves	2.01 kW peak demand
	Quantity of AC to be replaced with SEER 14 unit?	1			and	4,258 kWh electricity use.
	What is the total AC tonnage to be replaced with SEER 13 unit?	5			and	-25.1 therms natural gas
	What is the total AC tonnage to be replaced with SEER 14 unit?	5			or	0.0 gallons of Propane
	What is the IOU (or nearest IOU) area the unit is installed?	SDGE	choose 1 from drop menu		or \$	627.1 energy cost annually.
	What is the total installed cost for this measure?	\$ 20,000			Simple Payback is	31.9 years.
	What is the utility rebate for this measure?	\$ -			Saving to Investment Ratio	0.69



ENERGY SAVINGS CALCULATORS

HVAC continued

- This HVAC calculator cannot be used for 5.5 tons or larger. LEA needs to do a separate calculation using engineering study or modeling
- This calculator cannot be used for SEER 15 or higher. DEER database does not have impact for this measure



ENERGY SAVINGS CALCULATORS

Energy Efficiency Measure Savings Summary											
ECM	Energy Efficiency Project	Demand Savings	kWh Savings	Therm Savings	Propane Savings	Fuel Oil Savings	Cost Savings	Project Cost	Utility Rebate	Simple Payback	SIR
		kW	kWh	Therms	Gallons	Gallons	\$	\$	\$	Years	
ECM 1	Replace incandescent light with compact fluorescent light	2	14663	(89)	-	-	\$ 2,158	\$ 2,520	\$ -	1.1	3.63
ECM 2	Replace incandescent light with LED light	0	957	(5.79)	-	-	\$ 141	\$ 120	\$ -	0.9	16.76
ECM 3&4	Convert incandescent/CFL exit sign to LED exit sign	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 5&6	Convert T12 fluorescent to T8 with electronic ballast or LED Lamps	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 7	Replace 32 Watt T8 lamps with 28 Watt T8 Lamps	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 8&9	Replace exterior mercury vapor/HPS with LED/Induction lights	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 10	Install occupancy control for intermittently occupied rooms	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 11	Replace old packaged/split HVAC unit with high efficiency HVAC	2	4258	(25)	-	-	\$ 627	\$ 20,000	\$ -	31.9	0.69
ECM 12	Replace old heat pump with high efficiency heat pump	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 13A	Replace boiler with high efficiency condensing boiler	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 13B	Replace furnace with high efficiency condensing furnace	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 14	Seal existing HVAC leaky duct	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 15	Install variable speed drive for pumps and fans	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 16	Replace manual thermostat with programmable thermostat	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 17	Replace old motor with premium efficiency motor	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 18	Replace storage water heater with gas-fired tankless water heater	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 19	Install smart strip/PC management to control computers/printers	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 20	Install vending machine occupancy control	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
ECM 21	Install photovoltaic system	0	0	-	-	-	\$ -	\$ -	\$ -	-	-
	Total	4	19878	(120)	-	-	\$ 2,926	\$ 22,640	\$ -	7.7	1.08



ENERGY SAVINGS CALCULATORS

Bundling

- LEA can bundle short payback measures with long payback measures to meet SIR 1.05 requirement
- For example, short payback lighting measures could be bundled with HVAC or PV project, the total SIR can be found on Total-Summary tab



QUESTIONS...

About the Calculators?



*Let's talk about how to
upload your Energy
Expenditure Plan*



HOW TO SUBMIT (UPLOAD INSTRUCTIONS)

How do I upload my Energy Expenditure Plan?

- Application must be complete before submitting – have all final documents in electronic format ready for upload
- Obtain the link from your LEA contact person to access *Prop 39 Energy Expenditure Plan [System](#)*
- LEA must identify itself in the system by entering its county-district-school (CDS) code. Key the CDS code without spaces or hyphens



- Verify LEA is correct before selecting “Proceed”



CALIFORNIA ENERGY COMMISSION

CA.gov | Accessibility | Quick Links

HOME ABOUT



WELCOME TO PROP. 39 ENERGY EXPENDITURE PLAN SYSTEM!

To upload your Energy Expenditure Plan, please identify your Local Education Agency (LEA) by typing in your 14 digit County-District-School Code (CDS Code), with no spaces.

Example: 39523420000000

*CDS Codes can be searched at the Department of Education's website:
<http://www.cde.ca.gov/re/sd/>



CALIFORNIA ENERGY COMMISSION

CA.gov | Accessibility | Quick Links

HOME ABOUT



WELCOME TO PROP. 39 ENERGY EXPENDITURE PLAN SYSTEM!

To upload your Energy Expenditure Plan, please identify your Local Education Agency (LEA) by typing in your 14 digit County-District-School Code (CDS Code), with no spaces.

Example: 39523420000000

*CDS Codes can be searched at the Department of Education's website:
<http://www.cde.ca.gov/re/sd/>

You have selected the following Local Education Agency

Sacramento Co. Office of Education

HOW TO SUBMIT (UPLOAD INSTRUCTIONS)

Energy Expenditure Plan upload *continued*

- There are four uploading [sections](#):
 - Expenditure Plan General Form A
 - Expenditure Plan Project Summary Form B
 - Utility Data Release Authorization Form
 - Project Back-Up Documentation
- Click “[select file](#),” search for document on computer, and press “upload” file
- Repeat process for all uploading sections to submit a complete Energy Expenditure Plan



Expenditure Plan General Form A

Please select and upload the Form A

Select File

Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Expenditure Plan Project Summary Form B

Please select and upload the Form B(s) that go with Form A above.

Select File

Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Utility Data Release Authorization Form

Please select and upload the Utility Data Release Authorization Form(s). For every utility provider, this form should have been printed out, signed by the LEA Authorized Representative, and then scanned to be uploaded.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

Project Back-up Documentation

Please select and upload all project back-up documentation that supports the Expenditure Plan. Project Back-Up Documentation includes, but is not limited to, Energy Surveys (Energy Savings Calculators), Energy Audits, Energy Bills, and Building Owner Certification for leased facilities.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

Expenditure Plan General Form A

Please select and upload the Form A

Select File

Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Expenditure Plan Project Summary Form B

Please select and upload the Form B(s) that go with Form A above.

Select File

Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Utility Data Release Authorization Form

Please select and upload the Utility Data Release Authorization Form(s). For every utility provider, this form should have been printed out, signed by the LEA Authorized Representative, and then scanned to be uploaded.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

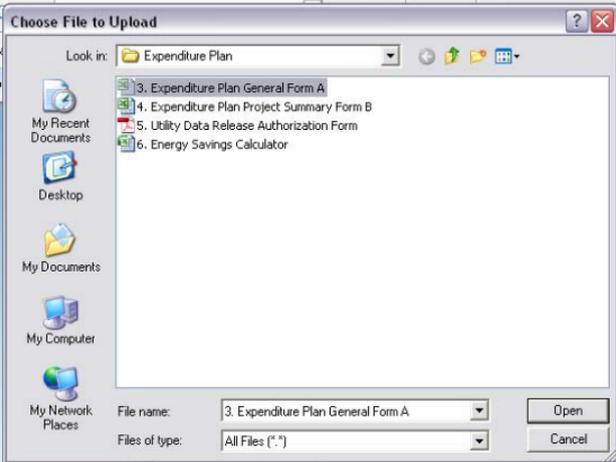
Project Back-up Documentation

Please select and upload all project back-up documentation that supports the Expenditure Plan. Project Back-Up Documentation includes, but is not limited to, Energy Surveys (Energy Savings Calculators), Energy Audits, Energy Bills, and Building Owner Certification for leased facilities.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB



Please select file(s) to upload.

rove.

Please select file(s) to upload.

Maximum file size: ~50 MB

Utility Data Release Authorization Form

Please select and upload the Utility Data Release Authorization Form(s). For every utility provider, this form should have been printed out, signed by the LEA Authorized Representative, and then scanned to be uploaded.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

Project Back-up Documentation

Please select and upload all project back-up documentation that supports the Expenditure Plan. Project Back-Up Documentation includes, but is not limited to, Energy Surveys (Energy Savings Calculators), Energy Audits, Energy Bills, and Building Owner Certification for leased facilities.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

Expenditure Plan General Form A

Please select and upload the Form A

Select File 1 file(s) in queue.

3. Expenditure Plan General Form A.xls (pending) Remove

Upload

Allowed file type: xls, xlsx
Maximum file size: ~50 MB



Expenditure Plan Project Summary Form B

Please select and upload the Form B(s) that go with Form A above.

Select File Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Utility Data Release Authorization Form

Please select and upload the Utility Data Release Authorization Form(s). For every utility provider, this form should have been printed out, signed by the LEA Authorized Representative, and then scanned to be uploaded.

Select File Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, gif
Maximum file size: ~50 MB

Project Back-up Documentation

Please select and upload all project back-up documentation that supports the Expenditure Plan. Project Back-Up Documentation includes, but is not limited to, Energy Surveys (Energy Savings Calculators), Energy Audits, Energy Bills, and Building Owner Certification for leased facilities.

Select File Please select file(s) to upload.

Expenditure Plan General Form A

Please select and upload the Form A

Select File

All Files Uploaded. Please select file(s) to upload.

3. Expenditure Plan General Form A.xls (Uploaded)

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Expenditure Plan Project Summary Form B

Please select and upload the Form B(s) that go with Form A above.

Select File

Please select file(s) to upload.

Allowed file type: xls, xlsx
Maximum file size: ~50 MB

Utility Data Release Authorization Form

Please select and upload the Utility Data Release Authorization Form(s). For every utility provider, this form should have been scanned out, signed by the LEA Authorized Representative, and then scanned to be uploaded.

Select File

Please select file(s) to upload.

Allowed file type: pdf, doc, docx, xls, xlsx, ppt, pptx, rtf, txt, jpg, jpeg, tif, tiff, gif
Maximum file size: ~50 MB

Project Back-up Documentation

Please select and upload all project back-up documentation that supports the Expenditure Plan. Project Back-Up Documentation includes, but is not limited to, Energy Surveys (Energy Savings Calculators), Energy Audits, Energy Bills, and Building Owner Certification for leased facilities.

Select File

Please select file(s) to upload.

HOW TO SUBMIT (UPLOAD INSTRUCTIONS)

Energy Expenditure Plan upload *continued*

- It is crucial that all documents are uploaded appropriately; name all files accordingly for easy identification
- Once a complete energy expenditure plan is submitted, Energy Commission staff will begin the approval process
- Refer to the Energy Expenditure Plan Handbook for additional instructions if needed

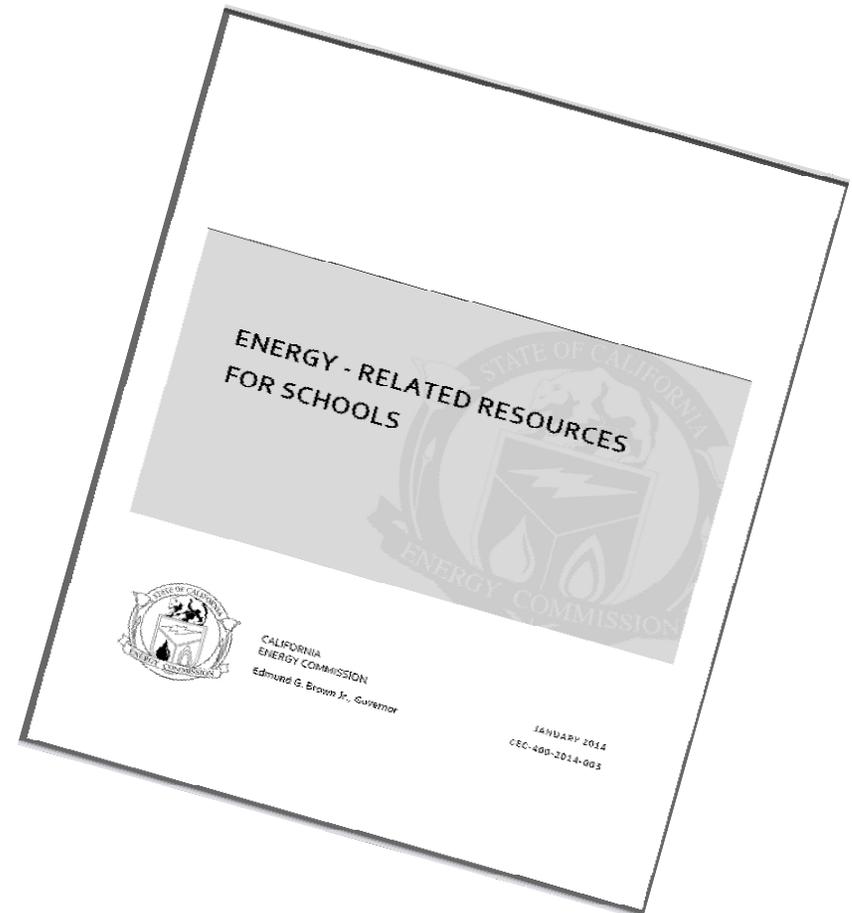


Let's talk about energy-related resources



ENERGY – RELATED RESOURCES

- Benchmarking Tools
- Commissioning Tools
- Energy Audits - Project Identification
- Energy Planning and Best Practices
- Energy Management and Project Implementation
- Funding Resources
- Training and Education



ENERGY – RELATED RESOURCES

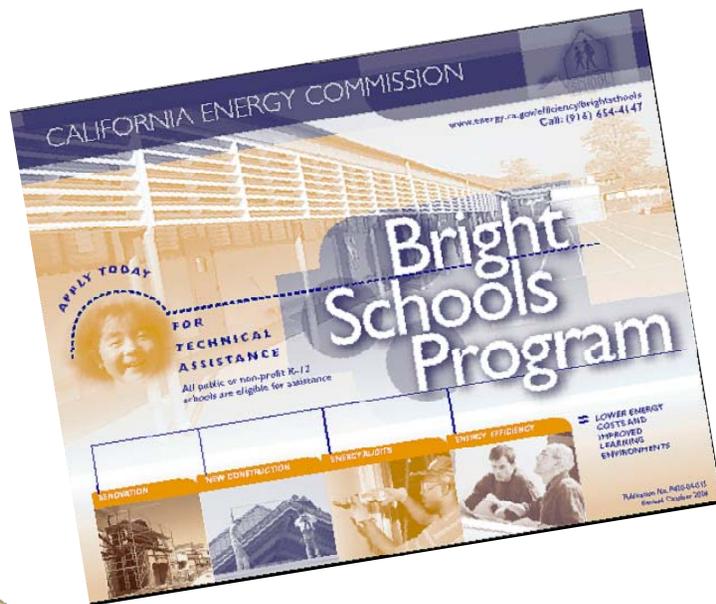
ENERGY Project Identification Resources

- **Above & Beyond** your district's Prop 39 allocation
 - Bright Schools Program – California Energy Commission
 - California Conservation Corps (CCC)



WHAT IS THE BRIGHT SCHOOLS PROGRAM?

Provides free technical assistance to help identify energy savings opportunities



BRIGHT SCHOOLS PROGRAM

Why should you apply to Bright Schools?

- Get an additional **\$20,000** of **Technical Assistance** for your Prop 39 Planning provided by CEC at no-cost
- Funds available **NOW**...no need to wait
 - Program is first come, first served
 - Limited funding
- **Independent and Objective** engineering assistance



BRIGHT SCHOOLS PROGRAM

What is “technical assistance”?

- **Comprehensive Energy Audits**
 - Energy audits / feasibility studies
 - (ASHRAE Level 2)
- **New Construction Design Assistance**
- **Proposal Review Assistance**
- **Bid Specification Assistance**



WHAT IS INCLUDED IN A COMPREHENSIVE ENERGY STUDY?

- **Executive Summary**
- **Existing Energy Use**
- **Energy Using Systems**
- **Energy Project Recommendations**
 - Annual Cost Savings
 - Project Costs
 - Simple Payback Period/SIR needed for Prop 39
 - All engineering calculations
 - Green house gas savings
- **Rebates and Financing Available**



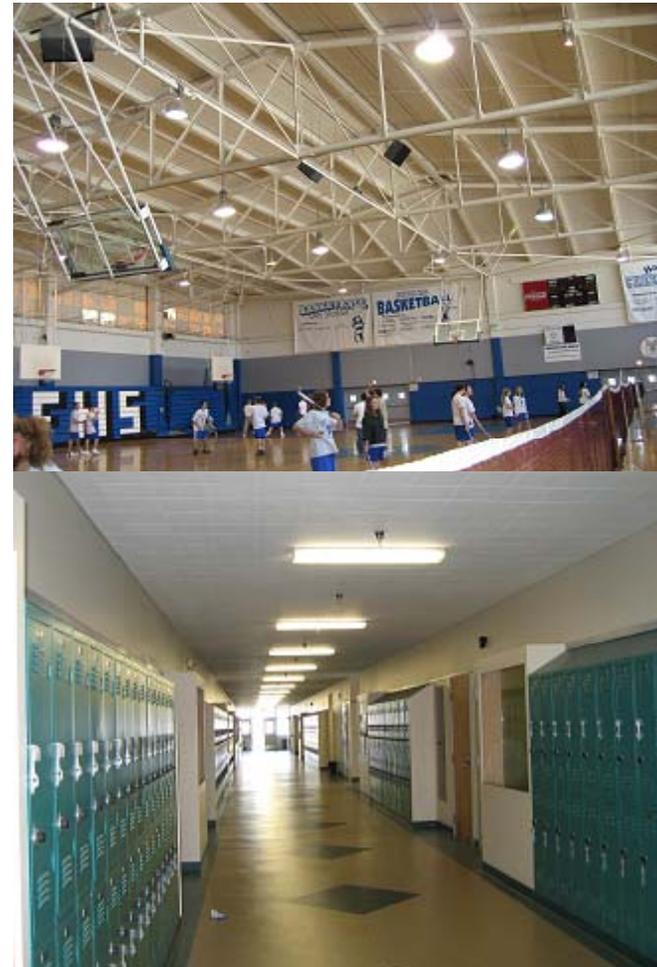
FORTUNA JOINT UNION HIGH SCHOOL DISTRICT

Project Recommendations:

- Lighting Efficiency Improvements
- HVAC Controls
- Tankless Water Heaters

Estimated Project Cost = \$90,552
Cost Savings = \$ 17,932 per year
Simple payback after incentive = 5 years

Other Analysis Completed:
Solar PV Analysis



BRIGHT SCHOOLS PROGRAM - COMMON QUESTIONS

Question: How long will it take to get an audit report?

Answer: Once we get a complete application, a draft report should be done in 3-6 months – sometimes quicker

Question: How many buildings can be covered with the \$20,000?

Answer: For a comprehensive audit, about 200,000 square feet. We can fund additional studies if you implement the recommendations



BRIGHT SCHOOLS PROGRAM - HOW TO APPLY



The image shows a sample of the 'California Energy Commission Technical Assistance Application' form. It is a two-page document with various sections for applicant information, project description, and project data. The form includes fields for applicant name, address, contact information, and checkboxes for project goals like energy audits and energy efficiency design. It also features a table for project data with columns for Title, Name, Description, and EPCF.

- Two Page Application
- Governing Board Resolution
- Latest 12 months of utility (electric & gas) bills for each facility account
- Any past energy studies
- Your site map

Download and complete the application from the CEC's Program website:

<http://www.energy.ca.gov/efficiency/brightschools/>



THANK YOU!

Please view the Energy Commission's website, or contact us by phone/e-mail if you have questions

<http://www.energy.ca.gov/efficiency/proposition39/index.html>

855-380-8722

Toll free (in-state)

916-653-0392

Toll line (out-of-state)

Prop39@energy.ca.gov

E-mail

