CHAPTER 8:
Instructions for Final Project Completion Report

Purpose

Local Educational Agencies (LEAs) are required to submit a final project completion report 12 – 15 months after the energy expenditure plan is completely installed. An energy expenditure plan is considered complete when the LEA has completed all measures in the approved energy expenditure plan. A final project completion report is required for each approved energy expenditure plan. LEAs will fill out the final project completion report using the Energy Expenditure Plan Online system.

The final project completion report will be made available on Energy Expenditure Plan Online a minimum of 12 months after the completion date identified in the annual progress report. The following are instructions for completing the final project completion report using Energy Expenditure Plan Online.

The final project completion report must be submitted within three months after it becomes available on Energy Expenditure Plan Online.

General Information and Tips

LEAs need to log in to Energy Expenditure Plan Online to access the annual progress report and final project completion report. For registration and log in instructions refer to Chapter 2 of this handbook.

To navigate through the system, either click on a field or use the “Tab” key. 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 based on the information requested. Automatically calculated fields in the system are calculated based upon entries in other input fields. Values that are in blue are for reference only and do not need to be edited by the LEA. LEAs are required to complete only the input fields. Input and selection fields turn yellow when selected to help the LEA keep track of what is being input or selected.

Hovering the cursor over certain fields will make a pop-up box appear 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 Energy Expenditure Plan Online is not automatically saved. Be sure to save information by clicking on the SAVE CURRENT PROCESS button periodically while entering final project completion report data.
General Overview and System Navigation

Upon log in the LEA is brought to the LEA Summary page.

On the top of the LEA Summary page a notification is displayed when annual progress reports or a final project completion report is available for the LEA to complete.

To navigate to the reports the LEA can use the “Progress Report” link on the top ribbon, or select the “annual progress report” or “final project completion report” notification links.

There are three major sections in the reporting page:

- **Report Summary** - The LEA uses this section to navigate to a report or review their approved EEP.
- **Annual Progress Report** - The LEA uses this section to enter information associated with their annual progress report.
- **Final Report** - The LEA uses this section to enter information associated with their final project completion report.

The LEA can navigate back to their EEPs by using the “Expenditure Plan” link in the ribbon.
1) **Report Summary:**

- **Review EEP** – This link will bring the LEA to the approved EEP for the associated report.
- **Edit Report** – This brings the LEA to the annual progress report or final project completion report to enter data.
- **Review Report** – This allows the LEA to view a submitted or approved report.

The Report Summary section allows the LEA to access various annual progress reports and final project completion reports. This includes reports to be submitted and reports previously submitted or approved. Additionally the LEA can navigate to their approved EEP to view the information associated with an annual progress report or final project completion report.

2) **Final Report Summary section** has four subsection tabs:

- **Energy Planning & Training** – The LEA provides information regarding planning funds and additional energy manager and training funds expenditures.
- **Schools/Sites** – The LEA navigates to sites included in the approved EEP and can upload backup documentation, including pictures of completed measures.
- **Job Creation** – The LEA provides information regarding funds spent on apprenticeships.
- **Certifications** – The LEA certifies information using an electronic signature.

In these tabs the LEA provides actual expenditures. The LEA is able to navigate to upload backup documentation and navigate to specific sites on the Schools/Sites tab.
Schools/Sites subsection tab summarizes all the sites included in the approved EEP. Selecting a site from the list of approved sites will bring up the following additional subsection tabs:

- **Site** - The LEA provides general measure implementation information.
- **Benchmarking** - The LEA provides updated energy usage information based on the most recent 12 month period.
- **Efficiency Measure** - The LEA updates information regarding energy efficiency measures including actual savings and costs.
- **Photovoltaic** - The LEA updates information regarding photovoltaic measures including actual savings and costs.
- **Power Purchase Agreements** - The LEA updates information regarding power purchase agreements including actual savings and costs.
- **Summary** - The LEA is provided a summary of site information entered in the final project completion report.

The LEA enters specific site information using these tabs. Benchmarking information must be based on the most recent 12 months energy data. Savings information is provided using one of the four methods described in Chapter 2, Step 8, of the 2016 Guidelines.

Navigation Buttons in the Energy Plan & Site Summary Section:

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

- **Back to Progress Report** - This brings the LEA back to the list of reports in the Report Summary section.
- **Save Current Process** - This saves all the information the LEA has keyed in so far. The information is not automatically saved and this button should be used often.

- **Review Final Report** - This allows the LEA to send the final project completion report to the Energy Commission for review.

**The Schools/Sites Subsection:**

- **Back to Final Report Summary** - This brings the LEA back to the list of sites in the schools/sites subsection tab in the Final Report Summary section.

- **Save Current Process** - This saves all information the LEA has entered so far. Please note that information is not automatically saved and this button should be used often.

- **Complete Site** - Use this button when all appropriate information for the specific school/site has been entered.
3) Review & Submit section

The final section is accessible only after all the information has been entered correctly into the final project completion report. To access this page, the LEA must select the Review Final Report button in any of the subsections. This page allows the LEA to see a general summary of the final project completion report. From this page, the LEA can submit a final project completion report to the Energy Commission or return to the final project completion report to enter or edit information.

To return to the editable version of the final project completion report, the LEA must use the Back to Final Report Summary button. This will return the LEA to the Final Report section.

Finally, to submit the final project completion report to the Energy Commission, the LEA must use the SUBMIT button. An acknowledgement of receipt will appear on the screen and final project completion report status will show as submitted on the Report Summary page.
Filling Out a Final Project Completion Report

Use the “Edit Report” link in the Report Summary section to navigate to the Final Report Summary section.

The **LEA Name**, **LEA Code**, and **Grant Amount Spent** are automatically populated based on the approved energy expenditure plan information.
First Subsection: Energy Planning & Training Subsection

In the Energy Planning & Training Subsection the LEA must provide actual cost information for planning funds requested from the California Department of Education (CDE). Additionally, the LEA must provide actual costs for energy manager and training activities if funds were requested as part of the approved energy expenditure plan.

Energy Planning Reservation Information:

Note: This section applies to LEAs that have requested and received planning funds directly from the CDE.

- **Did you request Energy Planning Funds? If no, move on to next section:** This is populated based on the LEA’s approved energy expenditure plan. The LEA does not need to edit this field.

- **Budget for Energy Surveys and Energy Audits:** This is populated based on the LEA’s approved energy expenditure plan and can be used for reference by the LEA.

- **Budget for Proposition 39 Program Assistance:** This is populated based on the LEA’s approved energy expenditure plan and can be used for reference by the LEA.

- **Budget for Energy Manager:** This is populated based on the LEA’s approved energy expenditure plan and can be used for reference by the LEA.

- **Budget for Training:** This is populated based on the LEA’s approved energy expenditure plan and can be used for reference by the LEA.

- **Amount Spent for Energy Surveys and Energy Audits:** If applicable enter the total amount of Proposition 39 planning reservation spent on energy surveys and energy audits. For reference this field is pre-populated with the “amount spent for energy surveys and energy audits” that was provided in the approved energy expenditure plan. The LEA will need to update this amount spent if necessary.

- **Amount Spent for Proposition 39 Program Assistance:** If applicable, enter the total amount of Proposition 39 planning reservation spent on program assistance activities. For reference this field is pre-populated with the “amount spent for program assistance” that was provided in the approved energy expenditure plan. The LEA will need to update this amount spent if necessary.
h. **Amount Spent for Energy Manager:** If applicable, enter the total amount of Proposition 39 planning reservation spent on energy manager(s). For reference this field is pre-populated with the “amount spent for energy manager” that was provided in the approved energy expenditure plan. The LEA will need to update this amount spent if necessary.

i. **Amount Spent for Training:** If applicable, enter the total amount of Proposition 39 planning reservation spent on training. For reference this field is pre-populated with the “amount spent for training” that was provided in the approved energy expenditure plan. The LEA will need to update this amount spent if necessary.

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.

Energy Manager and Training:

Note: This section relates to the funds requested in the approved energy expenditure plan for Energy Manager and Training activities.

<table>
<thead>
<tr>
<th>Energy Manager and Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you hiring an Energy Manager with funds requested in this Expenditure Plan?</td>
</tr>
<tr>
<td>No ▼</td>
</tr>
<tr>
<td>Amount Spent for Energy Manager: $ ▼</td>
</tr>
<tr>
<td>Are you using Proposition 39 funds for energy related training costs? No ▼</td>
</tr>
<tr>
<td>Amount Spent for Training: $ ▼</td>
</tr>
</tbody>
</table>

a. **Are you hiring an Energy Manager with funds requested in this Expenditure Plan?**
This is automatically filled out based on the LEA’s approved energy expenditure plan. The LEA does not need to edit this field.

b. **Amount Spent for Energy Manager:** Enter the total amount of the LEA’s Proposition 39 award funds spent for energy manager(s). This amount does not include planning funds requested from CDE and spent on the same category. For reference this field is pre-populated with the “amount requested for energy managers” that was requested and approved in an energy expenditure plan. The LEA will need to update this amount spent if necessary. If the LEA did not request funds for an energy manager the LEA does not need to fill out this field.

c. **Are you using Proposition 39 funds for energy-related training costs?** This is automatically filled out based on the LEA’s approved energy expenditure plan. The LEA does not need to edit this field.
d. **Amount Spent for Training:** Enter the total amount of the LEA’s Proposition 39 award funds spent for training activities. This amount does not include planning funds requested from CDE and spent on the same category. For reference this field is pre-populated with the “amount requested for training” that was requested and approved in an energy expenditure plan. The LEA will need to update this amount spent if necessary. If the LEA did not request funds for an energy manager the LEA does not need to fill out this field.

**Second Subsection: Schools/Sites**

The LEA can navigate to a specific school or site by using the “Edit Detail” Link in the Schools/Sites subsection. The list of sites is based on the sites included in the approved energy expenditure plan.

<table>
<thead>
<tr>
<th>Status</th>
<th>School/Site Name</th>
<th>CDE Code</th>
<th>Total Amount Spent</th>
<th>Prop. 39 Annual Spent</th>
<th>LEAComment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Alcove Elementary School</td>
<td>1663555800102292</td>
<td>$30,180.00</td>
<td>$30,180.00</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>Central Elementary School</td>
<td>1663555800103030</td>
<td>$394,521.00</td>
<td>$395,599.00</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>Stratford Elementary School</td>
<td>1663555800103035</td>
<td>$83,577.00</td>
<td>$83,577.00</td>
<td></td>
</tr>
</tbody>
</table>

**Estimated Total:** $454,278.00

$459,656.00

**Supporting Documents**

Instructions for providing specific site information will be discussed in more detail in the following sections. The LEA must only provide information for schools that are included in the approved energy expenditure plan. The status of all sites must be “Completed” before the LEA can submit the final project completion report.

**Uploading Supporting Documents:**

In efforts to assist in document the successful completion of projects, the Energy Commission is requesting that pictures of installed measures be included in the Final Project Completion
Report. Other supporting documents can be uploaded as well, such as updated engineering calculations, Energy Commission calculators, and or any type of post-project energy savings report.

Depending on the browser being used the LEA has two options for uploading supporting documents. The LEA 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 to upload supporting documents:

Drag and Drop Files – The LEA can drag the file from the desktop or folder and drop the file into Energy Expenditure Plan Online final project completion report template where it says “Drop files here.”

Select Files – The following is the process to upload files by selecting files from a computer.
The LEA must use the Select File button. Navigate to and select the file for upload and select Open.

The LEA’s files will appear in the system as shown below. Note that once the files are in Energy Expenditure Plan Online, the LEA will not be able to change the uploaded file. If the LEA makes changes to the original file stored locally on the LEA’s personal computer the file should be re-uploaded to Energy Expenditure Plan Online. Note: Newer files with the same file name as the one in the upload screen will automatically overwrite the older file.

Use the Upload button to upload the supporting documents. Use the Remove button if an incorrect file was selected.

Once a file has been uploaded, the LEA may delete that file from the list of supporting documents by using the Delete button.
Third Subsection: Job Creation

The Job Creation subsection provides estimated job creation estimates based on information entered into the final project completion report. The LEA will only need to enter data into one field when filling out the final project completion report. All other fields are automatically filled out.

- **Apprenticeships – Amount Spent**: Enter the actual Proposition 39 K-12 funds the LEA spent on apprenticeship positions under this EEP.

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

- **Estimated Apprenticeship Job-Years Created**: This is an automatically calculated field based on the Apprenticeships – Budget provided in the approved energy expenditure plan.

- **Energy Efficiency – Amount Spent**: This is an automatically calculated field. This is the sum of the amounts entered in the Proposition 39 Share Spent for Energy Efficiency Measures in the Efficiency Measure section from all school/sites included in the final project completion report.

- **Renewable Energy – Amount Spent**: This is an automatically calculated field. This is the sum of the amounts entered in the Proposition 39 Share Spent for Photovoltaic Measures fields in the Photovoltaic section for all schools/sites included in the final project completion report and the Proposition 39 Share Spent for Power Purchase Agreements fields in the Power Purchase Agreements section for all school/sites included in the final project completion report.

- **Clean Advanced Distributed Energy – Amount Spent**: 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.
**f. Estimated Direct Job-Years Created:** These fields will automatically calculate from the budgeted amounts in each Type of Project category.

**Fourth Subsection: Certifications**

In the Certifications subsection the LEA will provide an electronic signature and the contact information for the LEA’s authorized representative. The LEA can also manage applicable (Department of Industrial Relations) DIR Project ID associated with the energy expenditure plan. The LEA can use the public search utility on the DIR website (https://www.dir.ca.gov/pwc100ext/ExternallLookup.aspx) to search for a specific public works project and associated DIR Project ID.

![DIR Project ID(s)](image)

*a. DIR Project ID(s) Add:* The LEA can add additional DIR Project IDs associated with the EEP by entering the DIR Project ID into the field and using the Add button. Existing DIR Project IDs can be deleted by selecting the “x” next to the appropriate DIR Project ID.

*b. TYPE Name of Authorized Representative: /s:/* Type the name of the LEA authorized representative in the field provided. 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 **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.

c. **Date:** Enter the date the final project completion report is signed by the LEA authorized representative. A calendar pop-up is provided that the LEA may use to fill in the date.

d. **Email Address:** Type the email address for the authorized representative.

e. **Phone Number:** Type the phone number for the authorized representative.
Filling Out a Final Project Completion Report: Site

In the Schools/Site subsection, using the “Edit Detail” link will bring up six additional subsections pertaining to the specific site. The LEA will need to provide information for each site as part of the final project completion report.

First Schools/Site Subsection: Site

In the Site subsection the LEA must provide general information regarding the implementation of measures at the site.

The Site Name, CDS Code, Address, City, Zip Code, Assembly District, Senate District, and Congressional District are automatically filled out based on the approved energy expenditure plan.

Project Date:

a. **Project Start Date**: Enter the date that the LEA began implementation of measures at the site. Please use the format 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 and no earlier than December 19, 2013.

b. **Estimated Project Completion Date:** Enter the date when all measures at the site have been completed. Please use the mm/dd/yyyy format to enter the date. A calendar pop-up has been provided. The Project Completion Date should occur after the Project Start Date and no later than June 30, 2020.

c. **Narrative Description:** Provide a narrative description of measures implemented at the site. The description shall include any performance benefits/issues, changes to measures (i.e. quantity changes from the approved energy expenditure plan), and any operational changes at the site (i.e. expansions, hours of operation changes). It is essential to provide a detailed description, especially when there are changes in heating and cooling load due to weather variances, occupancy, hours of operation, building usage, and so on from what was submitted in the original energy expenditure plan.

a. **Sample Description:** All measures have been installed at XYZ elementary school. The total number of lighting fixtures retrofitted to 2 lamp LEDs was 970 which is 30 less than the 1,000 fixture replacement proposed in the approved energy expenditure plan. The replacement of the 7 HVAC units at D building has increased comfort levels by appropriately meeting cooling needs. This has resulted in classrooms used in D building serving as the new primary classrooms during summer school.
Second School/Site Subsection: Benchmarking

In the benchmarking section the LEA will need to provide energy usage information for the most recent 12 months.

a. **Square Footage of School/Site:** Enter the approximate gross square footage of the school or site where the LEA implemented the eligible energy measures. “Gross square footage” is the area of the school or site within exterior walls less any courtyards or other outdoor areas. For reference the area is pre-populated based on the approved energy expenditure plan. The LEA should update this value if necessary.

b. **Energy Bill Year:** Enter the year associated with the energy bills used to complete the Benchmarking section. Use the drop-down menu to select the appropriate year range. The LEA should use the most recent prior 12 month information, which should reflect 12 months of post project completion utility data.

c. **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. For reference this field is pre-populated based on the utilities identified in the approve energy expenditure plan. The LEA should update this information if necessary.
d. **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. For reference this field is pre-populated based on the accounts identified in the approve energy expenditure plan. The LEA should update this information to reflect any changes.

e. **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.) For reference this field is pre-populated based on the utilities identified in the approve energy expenditure plan. The LEA should update this information if necessary.

f. **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 reference this field is pre-populated based on the accounts identified in the approve energy expenditure plan. The LEA should update this information to reflect any changes.

For items (g) thru (q) below, please include all meters, including renewable on-site electric generation servicing the school/site. For costs include all utility costs, PPA costs, and third party supplier costs.

g. **Average Peak Demand (kW):** Enter the average peak demand of this school or site from the previous year electric bills. To determine this number, review the previous year bills for the school or site. 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.

h. **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, the LEA’s 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.

i. **kWh Purchased from Utility (kWh):** Enter the total electricity consumption of this school or site that is purchased from the local utility provider in the previous 12 months. Calculate this value by adding the electric usage stated in each of the previous 12 months of electric bills. If the school or site has multiple electric meters,
then add the annual electric usage for all meters. If the school or site does not use electricity, enter 0 into this field.

j. **Total Annual Electric Use (kWh):** This is an automatically calculated field from the information entered from items (i) and (j).

k. **Total Annual Gas Use (therms):** Enter the total annual natural gas usage of the school or site from the previous year natural gas bills. Calculate this value by adding the natural gas usage from each of the previous 12 months of bills. If the school or site has multiple natural gas meters, then add the annual natural gas usage for all meters at 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.

l. **Total Annual Propane Use (gals):** Enter the total amount of propane in gallons used by the school or site from the previous 12 months of propane bills. Calculate this value by adding the gallons of propane usage from the previous 12 months of 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.

m. **Total Annual Fuel Oil Use (gals):** Enter the total amount of fuel oil used in gallons by the school or site from the previous 12 months of fuel oil bills. Calculate this value by adding the gallons of fuel oil usage from the previous 12 months of 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.

n. **Total Annual Electric Charges ($):** Enter the total annual electricity cost for the school or site from the previous 12 months electric bills. The LEA should use the most recent 12 months information. Calculate this value by adding the dollar charges for electricity stated in the previous 12 months of 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 has an existing PPA, then add the dollar charges for electricity from the existing PPA. If the school or site does not use electricity, enter 0.

o. **Total Annual Gas Charges ($):** Enter the annual total natural gas cost for the school or site from the previous 12 months natural gas bills. Calculate this value by adding the dollar charges for natural gas stated in the previous 12 months of 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.

p. **Total Annual Propane Charges ($):** Enter the total annual propane cost of the school or site from the previous 12 months of propane bills. The LEA should use the most recent full 12 months information. Calculate this value by adding the dollar
charges for propane stated in the previous 12 months 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.

q. **Total Annual Fuel Oil Charges ($)**: Enter the total annual fuel oil cost of the school or site from the previous 12 months of fuel oil bills. The LEA should use the most recent full 12 months information. Calculate this value by adding the dollar charges for fuel oil stated in the previous 12 months of 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.

Fields in the Energy Use Intensity (EUI) Calculator are automatically calculated based on information entered into the Benchmarking subsection.

r. **W/SF** (watts per square foot): This signifies the electricity demand intensity of the school or site. The value automatically calculates using the provided *Average Peak Demand* and *Square Footage of School/Site*.

s. **kWh/SF** (kilowatts hours per square foot): This signifies the electricity use intensity of the school or site. The value automatically calculates using the provided *Total Annual Electric Use* and *Square Footage of the School/Site*.

t. **Cost/SF** (dollar cost per square foot): This signifies the electric cost intensity of the school or site. The value automatically calculates using the provided *Total Annual Electric Charges* and *Square Footage of School/Site*.

u. **Therms/SF** (therms per square foot): This signifies the natural gas use intensity of the school or site. The value automatically calculates using the provided *Total Annual Gas Use* and *Square Footage of School/Site*.

v. **Cost/SF** (cost of gas per square foot): This signifies the natural gas cost intensity of the school or site. The value automatically calculates using the provided *Total Annual Gas Charges* and *Square Footage of School/Site*.

w. **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 using the provided *Total Annual Propane Use, Total Annual Fuel Oil Use*, and *Square Footage of School/Site*.

x. **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 using the provided *Total Annual Propane and Fuel Oil Charges* and *Square Footage of School/Site*.
y. **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 using the provided charges for all energy sources and *Square Footage of School/Site*.

z. **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 using the provided energy use and *Square Footage of School/Site*. 
Third School/Site Subsection: Efficiency Measure

For each energy efficiency measure included in the approved energy expenditure plan the LEA must provide post installation energy savings and cost information. To determine post installation measure savings the LEA must use one of the four options provided in Chapter 2, Step 8, of the 2016 Guidelines.

a. **Proposition 39 Share Spent for Energy Efficiency Measures ($):** Enter the total dollar amount of Proposition 39 award funds the LEA used to implement all energy efficiency measures at this school or site. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the Proposition 39 share spent if necessary.

To enter the cost and savings information first select the appropriate measure from the list in the Efficiency Measures Summary. Next fill out the appropriate fields for the measure. Finally, use the **Update** button to keep the entered information, or the **Close** button to exit the measure without keeping the entered information.
When the LEA selects a specific energy efficiency measure, the Efficiency Measure Details section is populated based on the data in the approved energy expenditure plan. The LEA must update the Efficiency Measure Details based on determined measure savings and costs from post installation. To determine measure savings the LEA must use one of the four options provided in Chapter 2, Step 8, of the 2016 Guidelines.

Energy Measure Detail:

b. **Energy Efficiency Measure**: This field is automatically filled out based on the approved energy expenditure plan. The LEA cannot make changes to the energy efficiency measure.

c. **Pre/Post Description**: Enter further description of the energy efficiency measure. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update this description if necessary. The maximum number of characters the LEA can enter in this field is 256.

d. **Demand Savings (kW)**: Enter the post installation demand savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the demand savings based on the method chosen to calculate savings. If this energy efficiency measure has no demand savings, leave this field blank.
e. **Annual Electric Savings (kWh):** Enter the post installation electric savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the electric savings based on the method chosen to calculate savings. If this energy efficiency measure has no electric savings, leave this field blank.

f. **Annual Natural Gas Savings (therms):** Enter the post installation annual natural gas savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the natural gas savings based on the method chosen to calculate savings. If the energy efficiency measure has no natural gas savings, leave this field blank.

g. **Annual Propane Savings (gallons):** Enter the post installation annual propane savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the propane savings based on the method chosen to calculate savings. If the energy efficiency measure has no propane savings, leave this field blank.

h. **Annual Fuel Oil Savings (gallons):** Enter the post installation annual fuel oil savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the fuel oil savings based on the method chosen to calculate savings. If the energy efficiency measure has no fuel oil savings, leave this field blank.

i. **Annual Energy Cost Savings ($):** Enter the post installation total annual energy cost savings based on the post installation calculated savings. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the cost savings based on the method chosen to calculate savings. If the energy efficiency measure includes both electricity and fuel cost savings, include the total of these cost savings.

j. **Measure Cost ($)**: Enter the actual total cost for implementing this energy efficiency measure at this school or site. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the measure cost to reflect actual costs. This includes all grants, rebates, repayable, and non-repayable costs.

k. **Rebates ($)**: Enter the actual total dollar amount of rebates the LEA receives for this energy efficiency measure. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update rebates on actual data. Rebates are considered utility rebates or other incentives that reduce the project cost. If the energy efficiency measure did not receive rebates, leave this field blank.

l. **Other Non-Repayable Funds ($)**: Enter the actual total dollar amount of other non-repayable funds the LEA used to implement this energy efficiency measure (other
than Proposition 39 award and rebate funds). For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update this field based on actual costs. 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. If the energy efficiency measure was not implemented with other non-repayable funds, leave this field blank.

m. **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 **Update** to keep the information. Repeat this process to report on all energy efficiency measures at the site. Using the **Close** button will exit the selected energy efficiency measure without keeping revised information.

A list of errors will be generated if any required information is not included when the **Update** button is used. These errors will need to be addressed before the energy efficiency measure can be updated.

** Important Note: Using **Update** does not save the changes to the final project completion report. Please use the **Save Current Process** button to manually save changes. Leaving the final project completion report without using the **Save Current Process** button will result in the loss of the added energy efficiency measures.

It is important to click **Update** first before clicking the **Save Current Process** button or the measures will not be added and saved.
Fourth School/Site Subsection: Photovoltaic

For each photovoltaic measure included in the approved energy expenditure plan the LEA must provide actual savings and cost information. To determine post installation energy savings the LEA must use one of the four options provided in Chapter 2, Step 8, of the 2016 Guidelines.

b. **Proposition 39 Share for Photovoltaic Measures ($):** Enter the total dollar amount of Proposition 39 award funds the LEA used to implement all photovoltaic measures at this school or site. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the Proposition 39 share if necessary.

To enter the post installation cost and energy savings information first select the appropriate measure from the list in the Photovoltaic Project Summary. Next fill out the appropriate fields for the measure. Finally use the Update button to keep the entered information, or the Close button to exit the measure without keeping the entered information.
When the LEA selects a specific photovoltaic measure, the Photovoltaic Details section is populated based on the data in the approved EEP. The LEA must update the Photovoltaic Details based on determined measure savings and costs from post installation. To determine post installation measure savings the LEA must use one of the four options provided in Chapter 2, Step 8, of the 2016 Guidelines.

Photovoltaic Detail:

m. **Effective Useful Life:** Select the effective useful life for the LEA’s PV system. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the estimated useful life if necessary. If 25 years is selected, the LEA must include a 25-year panel performance warranty from the PV vendor with its supporting documents.

n. **PV System Size (kW AC):** Enter the alternating current (AC) power rating of the PV system proposed for installation at the school or site. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the system size if necessary.

o. **Inverter Size (kW):** Enter the total inverter capacity in kilowatts of all the inverters associated to the PV measure. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the inverter size if necessary.

p. **Year 1 Production (kWh):** Enter the actual first year energy production of this PV system. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the annual production based on the post installation calculated savings.

q. **Demand Savings (kW):** Enter the post installation demand savings associated with this PV system. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the demand savings based on the post installation calculated savings.

r. **Year 1 Energy Cost Savings ($):** Enter the actual first year energy cost savings of this PV. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the cost savings based on the method chosen to calculate savings.

s. **Measure Cost ($):** Enter the actual total cost to implement the PV system. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the costs based on the actual measure costs.

t. **Rebates ($):** Enter the actual total amount of rebates used to implement the PV measure. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the rebates based on actual rebate amounts. Rebates are considered utility rebates or other incentives that reduce the project cost.
u. **Other Non-Repayable Funds ($):** Enter the actual total dollar amount of other non-repayable funds the LEA used to implement the photovoltaic measure (other than Proposition 39 award and rebate funds). For reference this field is pre-populated based on the approved EEP. The LEA will need to update this field based on actual non-repayable funds used. 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. If the measure was not implemented with other non-repayable funds, leave this field blank.

v. **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 Details has been entered, click **Update** to keep the information. Repeat this process to report on all photovoltaic measures at the site. Using the **Close** button will exit the selected photovoltaic measure without keeping revised information.

A list of errors will be generated if any required information is not included when the **Update** button is used. These errors will need to be addressed before the energy efficiency measure can be updated.

**Important Note:** Using **Update** does not save the changes to the final project completion report. Please use the **Save Current Process** button to manually save changes. Leaving the final project completion report plan without using the **Save Current Process** button will result in the loss of the added measures.

It is important to click **Update** first before clicking the **Save Current Process** button or the measures will not be added and saved.
**Fifth School/Site Subsection: Power Purchase Agreements**

For each power purchase agreement measure included in the approved EEP the LEA must provide actual savings and cost information. To determine actual measure savings the LEA must use one of the four options provided in Chapter 2, Step 8, of the *2016 Guidelines*.

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**a. Proposition 39 Share for Power Purchase Agreements ($)**: Enter the actual total dollar amount of Proposition 39 award funds the LEA used to implement all power agreement measures at this school or site. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the Proposition 39 share if necessary.
To enter the cost and savings information first select the appropriate measure from the list in the Power Purchase Agreements Summary. Next fill out the appropriate fields for the measure. Finally use the **Update** button to keep the entered information, or the **Close** button to exit the measure without keeping the entered information.

When the LEA selects a specific power purchase agreement measure, the Power Purchase Agreement Details section is populated based on the data in the approved EEP. The LEA must update the Power Purchase Agreement Details based on determined measure savings and costs from post installation. To determine measure savings the LEA must use one of the four options provided in in Chapter 2, Step 8, of the **2016 Guidelines**.

Power Purchase Agreement Detail:

b. **PV Size (kW AC):** Enter the post installation alternating current (AC) power rating of the clean energy generation system installed at the school or site. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the PV system size if necessary.

c. **Peak Demand Savings (kW):** Enter the post installation peak demand savings based on the installed system size and location. For reference this field is pre-populated based on the approved energy expenditure plan. The LEA will need to update the actual demand savings based on the post installation calculated savings.

d. **Year 1 Production (kWh):** Enter the annual electricity production in kWh based on the system size and location. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the annual production based on the method chosen to provide post installation energy savings.

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). For reference this field is pre-populated based on the approved EEP. The LEA will need to update the term of the agreement if necessary.
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 electricity use of the site by dividing the first year's production by the most recent 12 months electricity use. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the annual production based on the method chosen to calculate savings.

g. **First Year PPA Electricity Cost ($):** This is the actual 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. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the cost based on actual first year costs.

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 four cents. To get the percentage price discount, divide four cents by 20 cents to obtain 20 percent. In this example, enter 20 in this field. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the percent discount based on average first year costs.

i. **PPA Electric Price Escalation (%):** Enter the energy cost escalation rate that was agreed to in the PPA. The escalation rate should not exceed three percent nominal. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the escalation rate if necessary.

j. **NPV of Utility Cost Savings ($):** Net present value (NPV) of the difference between the annual electricity cost paid to the utility immediately before and after the PPA. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the NPV of utility cost savings based on the method chosen to calculate savings.

k. **NPV of Payment to PPA Vendor ($):** Net present value of electricity cost paid to the PPA vendor over the term of the PPA. For reference this field is pre-populated based on the approved EEP. The LEA will need to update the NPV of payment based on actual costs.

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. For reference this field is pre-populated based on the
approved EEP. The LEA will need to update the Proposition 39 contribution based actual grant amount used.

Once all the information in the Power Purchase Agreement Details has been entered, click Update to keep the information. Repeat this process to report on all PPA measures at the site. Using the Close button will exit the selected measure without keeping revised information.

A list of errors will be generated if any required information is not included when the Update button is used. These errors will need to be addressed before the energy efficiency measure can be updated.

**Important Note:** Using Update does not save the changes to the final project completion report. Please use the Save Current Process button to manually save changes. Leaving the final project completion report without using the Save Current Process button will result in the loss of the added measures.

It is important to click Update first before clicking the Save Current Process button or the measures will not be added and saved.
Sixth Subsection: Summary

All information in the Summary Tab is calculated automatically based on the information keyed into the final project completion report.

Savings Summary:

a. **Total Demand Savings:** This field is automatically calculated to reflect the post installation 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 post installation 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 post installation 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 post installation total fuel oil savings for these energy efficiency measures for the school or site.
e. **Total Annual Cost Savings:** This field is automatically calculated to reflect the post installation 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 post installation total propane savings for these energy efficiency measures proposed for the school or site.

Cost & Rebates:

g. **Total Project Cost:** The actual 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 actual 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 actual total amount spent under PPAs applicable to the school or site.

j. **Total Rebates:** This is automatically calculated to reflect the actual total amount of rebates for energy efficiency measures and PV measures proposed for the school or site based on the information provided in the input fields.

k. **Total Other Non-Repayable Funds:** This is automatically calculated to reflect the actual total amount of other non-repayable funds for energy efficiency measures and PV measures proposed for the school or site based on the information the LEA provides in the input fields.
Review and Submit the Final Project Completion Report

The LEA will need to submit the final project completion report to the Energy Commission for review.

When the LEA is prepared to submit the final project completion report the LEA must use the Review Final Report button in any of the subsections. A series of checks will be made to ensure that all required data has been provided. If all required information has been entered, the LEA will be provided a general review screen as shown below. The LEA should review their information one last time.

After the LEA review the information, the LEA can choose to submit the final project completion report to the Energy Commission for review or continue working on the final project completion report. If the LEA would like to continue working on the final project completion report select the CLOSE button to return to the Final Report Summary section. To send the final project completion report to the Energy Commission for review select the SUBMIT button.

When the final project completion report is submitted the status shown in the Report Summary page will be updated to “Submitted.” The LEA will be able to review the submitted report using the “Review Report” link.