



Request for Technical Assistance

To Support School Decarbonization Projects

INTRODUCTION

To assist schools as they plan, design, and procure new construction projects or energy upgrades, Efficiency Maine offers a financial incentive for qualifying professional services directly related to complex energy projects. Eligible projects must result in reduced carbon emissions. Efficiency Maine may provide up to 50%, not to exceed \$20,000, toward the cost of approved Technical Assistance (TA) studies.¹ Only professional services provided by an engineering or legal firm from the [Approved TA Provider List](#) will be eligible for a TA Incentive.²

Examples of TA studies for which a school might seek Efficiency Maine's TA Incentive include: (a) engineering services to develop HVAC design and cost-estimates for installing heat pump, or variable refrigerant flow (VRF) heat pump systems (b) legal services associated with drafting or negotiating solar PV Power Purchase Agreements (PPAs) or other community solar PV agreements; (c) engineering services for design and cost estimates of energy recovery ventilation (ERV) systems. Examples of simple energy projects that are not eligible for this TA Incentive are lighting retrofits, window and door replacements, other building envelope weatherization measures, and electric vehicle (EV) charger installations.

GENERAL GUIDELINES FOR SCHOOL DECARBONIZATION TECHNICAL ASSISTANCE

1. Only k-12 schools are eligible. Schools may be public, private or parochial.
2. Only complex energy projects which require professional services to determine design and analysis of energy impacts are eligible.
3. Preapproval is required.
4. The TA support must be conducted by an approved TA provider.²
5. Efficiency Maine will fund 50% of approved TA study costs up to \$20,000. The remaining 50% will be funded directly by the participant.
6. In order to award funding, Efficiency Maine will perform a review of the TA study proposal.
7. Efficiency Maine reserves the right to reject any proposal that is inconsistent with the objective of helping Maine schools become carbon neutral as provided in Title 35-A §10123 – School Decarbonization Program.
8. For engineering TA studies, the final report must meet the standards of an investment grade analysis.
9. Schools must retain and retire renewable energy credits (RECs) in order to be eligible for solar PV TA.

¹ Projects receiving funding through the School Decarbonization Technical Assistance program may not also receive funding from the standard Technical Assistance program.

² Firms not listed on Efficiency Maine's approved TA provider list, may apply for qualification to provide TA services here: <https://www.energymaine.com/technical-assistance-providers/>

TA STUDY APPLICATION STEPS AND REQUIREMENTS

1. The school contacts Efficiency Maine to discuss the proposed project.
2. TA Provider submits a statement of qualifications or experience for the professional services to be delivered and Efficiency Maine authorizes TA Provider to provide services for the project³
3. The school submits a Request for TA Application and TA study proposal. The TA application must include:
 - a. Brief narrative description of the site, and proposed energy project.
 - b. A TA Provider proposal for the study with a detailed “not to exceed” study cost. For Solar PV legal support, a description of provider billing rates, and an estimate of the hours needed to arrange the agreement will be accepted.
 - c. For engineering TA studies, the TA provider must provide a detailed description of the planned study activities and proposed analysis approach.
 - d. Efficiency Maine will seek input from the participant about what an acceptable return on investment for the project is in order to assess likelihood of the project being installed.
 - e. The Request for TA Application (final page of this document) signed by the customer point of contact
4. Efficiency Maine reviews and provides feedback for TA study modifications or approves the TA study proposal.
5. The customer or TA Provider must provide Efficiency Maine with a brief monthly update on progress by email.
6. TA Study Provider shares invoices to customer **and** Efficiency Maine, as billed.
7. The school or TA Provider submits final TA study report, or for solar PV, the final PPA or net energy billing agreement.
8. Efficiency Maine reviews TA study or solar PV agreement and issues technical assistance payment of 50% of approved costs up to \$20,000.⁴

³ If not already an [approved TA provider](#)

⁴ Efficiency Maine reserves the right to provide feedback on TA studies before issuing payment to ensure the study meets the needs of the school and of the School Decarbonization Program.

TA STUDY REQUIREMENTS

Engineering TA Study reports should be prepared using the following format and containing the following information. For solar PV PPA and net energy billing agreements, the final agreement will serve as the TA study report.

Executive Summary

Summarize the study results or findings.

Section 1. TA Provider Description

Identify the lead engineer and contact person, if different.

Section 2. Building/Facility Description

Describe general building characteristics and existing energy use.

Section 3. Measure Type

Provide a detailed description of project measure(s) including all operating characteristics. Attach, as appendices, any manufacturer's data or case studies from other installations that help explain or illustrate the technology or proposed measure.

Section 4. Proposed Baseline

Provide savings and costs from the baseline equipment that the proposed measure replaces. Justify baseline assumptions. For new construction projects or major renovation projects, describe the theoretical baseline that the savings estimates are based on.

Section 5. Description of Study Methods

Describe the methodology for determining the kWh or MMBtu savings or impacts. Identify and describe any simulation modeling used, if applicable.

Section 6. Energy Savings Estimates

Computations must comply with the program requirements detailed in the Program Opportunity Notice. Provide an electronic copy of all data and analysis supporting the predicted energy impacts of the project. Provide clear documentation and support for all assumptions used in the derivation of predicted energy impacts.

Section 7. Demand Savings

Provide overall demand savings estimated as well as summer and winter peak demand reductions (if applicable).

Section 8. Measure Costs and Estimated Incremental cost

Provide a detailed line-item breakdown of the estimated project costs. Include copies of vendor quotes for project equipment/components. Include an accurate model of the overall life cycle financial impacts of the project. Provide documentation of the basis for any non-energy related costs or benefits that are reflected in the life cycle cost analysis.

BACKGROUND INFORMATION ABOUT SOLAR PPAs

Schools are generally tax-exempt entities. As such, they cannot take advantage of the substantial federal investment tax credit (ITC) available for solar PV because they have no tax liability to offset. There are ways, however, that schools can get some benefit from the tax credit when pursuing a solar project. By partnering with a for-profit business (like a solar developer or an investor), the school can sign a PPA or other “virtual” PPA agreement such as a community solar agreement. In this scenario, the business invests the funds to purchase and install the solar system. It owns the system and claims the ITC tax incentive against its tax liability. The school enters a contract to pay the business to purchase the electricity from the solar system for a fixed price and term of years. In negotiating the contract, the school and the business will determine what will happen with the solar system at the end of the PPA contract term: the customer may buy the solar energy system from the business, or extend the PPA, or have the system removed.

COMMERCIAL & INDUSTRIAL CUSTOM PROGRAM
Request for Technical Assistance
School Decarbonization Projects



PROGRAM PARTICIPANT INFORMATION

School Name:

Mailing Address:

City/Town:

State:

Zip Code:

Project Address:
(if different from above)

City/Town:

State:

Zip Code:

Contact Name/Title:

Email:

Telephone:

Federal Tax ID:

Utility/Utilities Servicing Facility:

Applicant Signature:

Date:

Customer acknowledgment that renewable energy credits (RECs) must be retained by the host site and retired to be eligible for TA support of solar PV agreements

TA PROVIDER INFORMATION

Company Name:

Mailing Address:

City/Town:

State:

Zip Code:

Contact Name/Title:

Email:

Telephone:

Fax:

Brief description of project:

Reserved for Efficiency Maine Use

APPROVAL OFFER

Approval Date:

Expected Completion Date:

Efficiency Maine Technical Reviewer:

Signature:

Date: