

Example Scenario 1: LEA as Prime

EXAMPLE SCENARIO 1: LEA AS PRIME

Local Educational Agency (LEA)



PHASE 1

Prize

PORTFOLIO + TEAM

DOE Funds = \$300K

Portfolio identifies 10 schools in Disadvantaged Communities (DACs) with high energy costs.

PHASE 2

Cooperative Agreement

STRATEGIC PLAN + ENERGY AUDITS

DOE Funds = \$500K
Cost Share (5%) = \$26K

All 10 schools receive an **energy analysis**, details of Energy Conservation Measures (ECMs), and a financial analysis for pay back through **IRS Elective Pay**.

PHASE 3

Cooperative Agreement

IMPLEMENTATION

DOE Funds = \$7M
Cost Share (25%) = \$2.3M
Total Project Costs = \$9.3M

LEAs pay a **25% cost share** for solar and geothermal securing private sector bridge financing. Schools receive support in applying for **elective pay** to receive the tax credit to pay down the private loan quickly. DOE shares the process for direct pay **with schools nationwide**.

Example Scenario 2: LEA as PRIME, Multiple-LEA Portfolio

EXAMPLE SCENARIO 2: LEA AS PRIME, MULTIPLE-LEA PORTFOLIO

Local Educational Agency (LEA)



PHASE 1

Prize

PORTFOLIO + TEAM

DOE Funds = \$300K

Portfolio identifies 21 schools with high energy costs and failing systems.

PHASE 2

Cooperative Agreement

STRATEGIC PLAN + ENERGY AUDITS

DOE Funds = \$1M
Cost Share (5%) = \$52K

All 21 schools receive an **energy analysis**, details of Energy Conservation Measures (ECMs), and a financial analysis for pay back through **IRS Elective Pay**.

PHASE 3

Cooperative Agreement

IMPLEMENTATION

DOE Funds = \$14M
Cost Share (25%) = \$4.6M
Total Project Costs = \$18.6M

LEA pays a **25% cost share** for efficiency retrofits, solar, and geothermal through private sector bridge financing. LEA applies for **elective pay** to receive the tax credit to pay down the private loan quickly. DOE shares the process for direct pay **with schools nationwide**.

Example Scenario 3: ESCO as Prime, Multiple-LEA Portfolio

EXAMPLE SCENARIO 3: ESCO AS PRIME, MULTIPLE-LEA PORTFOLIO

Energy Service Company (ESCO)



PHASE 1

Prize

PORTFOLIO + TEAM

DOE Funds = \$300K

Portfolio identifies 15 schools that are 70 years and older in Disadvantaged Communities (DACs).

PHASE 2

Cooperative Agreement

STRATEGIC PLAN + ENERGY AUDITS

DOE Funds = \$750K

Cost Share (5%) = \$39K

All 15 schools receive Level 2 ASHRAE **energy audits** to identify cost-saving Energy Conservation Measures (ECMs) for an Energy Savings Performance Contract (ESPC).

PHASE 3

Cooperative Agreement

IMPLEMENTATION

DOE Funds = \$10.5M

Cost Share (50%) = \$10.5M

Total Project Costs = \$21M

Through an ESPC, a **50% cost share** for **geothermal heat pumps, building controls, and electric vehicle chargers** is provided. Schools see a **35% energy cost savings**. Schools may receive additional funding through **elective pay** to buy down the loan.

Example Scenario 4: Owner's Rep as Prime, Multiple-LEA Portfolio

EXAMPLE SCENARIO 4: OWNER'S REP AS PRIME, MULTIPLE-LEA PORTFOLIO

Owner's Rep



PHASE 1

Prize

PORTFOLIO + TEAM

DOE Funds = \$300K

Portfolio identifies 10 schools in Disadvantaged Communities (DACs) with high energy costs.

PHASE 2

Cooperative Agreement

STRATEGIC PLAN + ENERGY AUDITS

DOE Funds = \$500K

Cost Share (5%) = \$26K

All 10 schools receive an **energy analysis**, details of Energy Conservation Measures (ECMs), and a financial analysis for pay back through **IRS Elective Pay**.

PHASE 3

Cooperative Agreement

IMPLEMENTATION

DOE Funds = \$7M

Cost Share (25%) = \$2.3M

Total Project Costs = \$9.3M

Local Educational Agencies (LEAs) pay a **25% cost share** for solar and geothermal with the Owner's Rep securing private sector bridge financing. Schools receive application support for **elective pay** to receive the tax credit and pay down the private loan quickly. DOE shares the process for direct pay **with schools nationwide**.