

#### 2024 Renew America's Schools Prize - Office Hours #2

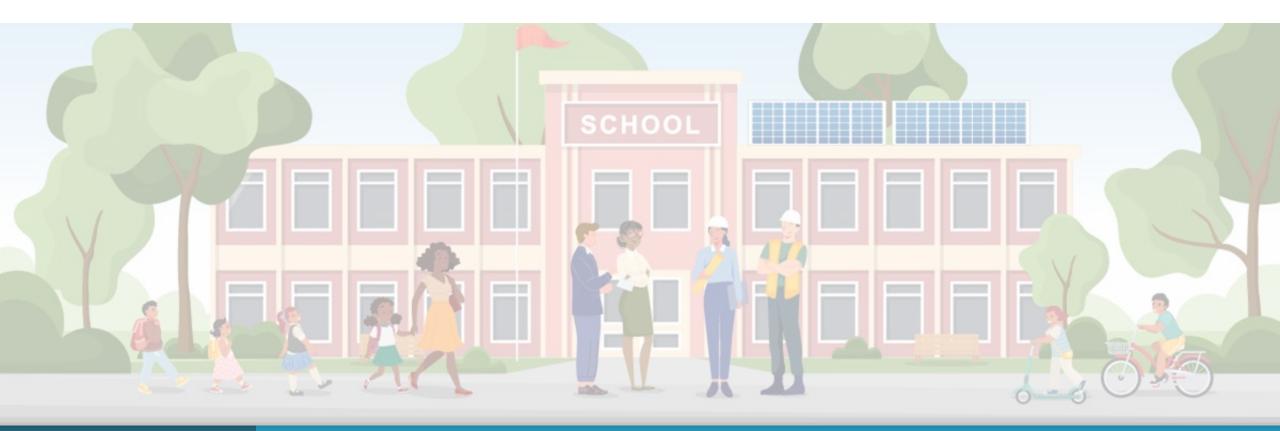
May 29, 2024

Renew America's Schools Program

Bipartisan Infrastructure Law (BIL)

#### **Notice**

- Participation in today's webinar will not convey any advantages or disadvantages in the application evaluation process
- Your participation is completely <u>voluntary</u>.



#### **Notice**



- Carefully read the <u>Official Rules</u> and adhere to the submission requirements
- If inconsistencies exist between the Official Rules and this presentation, or statements from DOE personnel, the official documents are the controlling items

- Official Rules: <u>2024 Renew America's Schools</u>
   <u>Prize | HeroX</u>
- If you have questions, please email schools@doe.gov.

#### Welcome

This Office Hours is being recorded and will be published on the HeroX prize page. Please note that video and speaking capability has been disabled for attendees. We will address some, but not all, questions posted in the chat with approved and published answers. Please direct questions during this webinar to the Q&A feature. Questions will be captured and posted with answers in the DOE Q&A Spreadsheet linked in the FAQ section on HeroX. Live questions will not be answered during the webinar itself. Please be careful not to submit any language that might be business sensitive, proprietary or confidential. A copy of today's slides will be posted on HeroX within 2-3 business days of the webinar.

https://www.herox.com/renewschoolsprize

### Agenda

- Overview 2024 Renew America's Schools Prize
- Submission Overview
- III. Submission Reviews
- (IV.) Cost Share Examples
- V. Q&A Highlights
- VI. Navigating the Q&A
- VII. Conclusion and Key Reminders

I. Overview - 2024 Renew America's Schools Prize

# **Anticipated Schedule**

Milestone	Date
Prize Issue Date:	March 20, 2024
Submission Deadline:	June 13, 2024, by 5 pm ET
Expected DOE Selection Notifications:	August 2024 (anticipated)
Expected Timeframe for Cooperative Agreement Negotiations:	Starting in Fall 2024 (anticipated)

The application does NOT include a Concept Paper.

#### **2024** Renew America's Schools Overview = \$180M across 3 Phases



PHASE 1

Prize
PORTFOLIO + TEAM

PHASE 2

Cooperative
Agreement
STRATEGIC PLAN + ENERGY AUDITS

PHASE 3

Cooperative Agreement

Number of Anticipated Awardees

Up to 23 winners. Minimum of 10 schools per portfolio selected.

**Award** 

\$300K cash prize each

\$500K - \$1M\*

\$7M - \$14M\*

**Cost Share** 

No cost share required

Minimum 5%

Minimum 25%

Total Award Funding (\$180M)

Up to \$6.9M

\$10 - \$15M

\$150 - \$170M





#### **Cooperative Agreement Funding is Based on Portfolio Size**



10–14 Schools & School Facilities\*

**15–19 Schools & School Facilities** 

20+ Schools & School Facilities

PHASE 1

Prize
PORTFOLIO + TEAM

\$300K

\$300K

\$300K

PHASE 2

Cooperative Agreement

**STRATEGIC PLAN + ENERGY AUDITS** 

\$500K

\$750K

\$1M

PHASE 3

**Cooperative Agreement** 

**IMPLEMENTATION** 

\$7M

\$10.5M

\$14M

\*Portfolios must have 10 or more schools/school facilities







### II. Submission Overview

# **Submission Package (Rules Section 1.6)**

The submission documents are summarized below in Table 3. Additional details in this section explain how to successfully collect and present the information for each required document. All templates and resources for this Prize can be found on HeroX under the Resources tab.

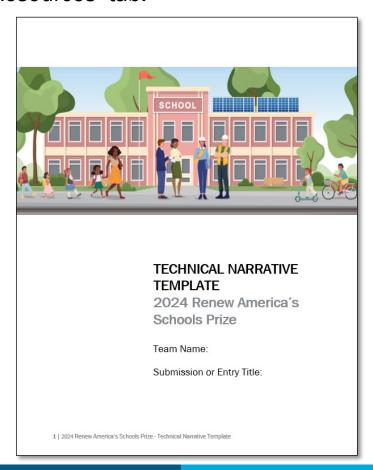
Table 3. Submission Items for Phase 1

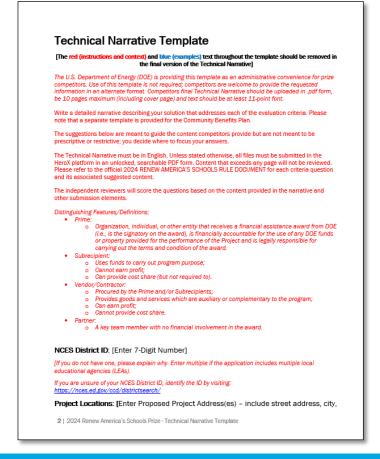
Section	Page/Size Limit	Will be made Public	Required	Template Provided
0. Team Name	N/A	Yes	Yes	N/A
1. Technical Narrative	10 pages maximum including cover page, text should be at least 11-point font	No	Yes	Yes
2. Energy Justice Mapping Tool Reports	No Page Limit	No	Yes	Yes, use if unable to generate report
3. School Energy Assessment (SEA) Form Tool Reports	No Page Limit	No	Yes	Yes
4. Community Benefits Plan (CBP)	5 pages maximum including cover page, text should be at least 11-point font-	No	Yes	Yes
5. Resumes	One page maximum per individual, combined into a single document	No	Yes	No
6. Letters of Commitment	One page maximum per letter, combined into a single document	No	Yes	No
7. Summary Slide	1 slide maximum, designed for conference room projection, text should be at least 14-pt font	Yes	Yes	Yes

Applications must be submitted through HeroX by **5 pm ET**June 13, 2024

### **Technical Narrative (1.6.1)**

A template is provided to help organize the narrative; use of this template is encouraged, but not required. The suggestions in the Technical Narrative Template are not meant to be prescriptive or restrictive; the competitor should decide how to best structure their response. Templates can be found on <a href="HeroX">HeroX</a> under the 'Resources' tab.





Note: Minor edits were made on the Template Technical Narrative. The most up-to-date version was uploaded to HeroX on 5/1/24.

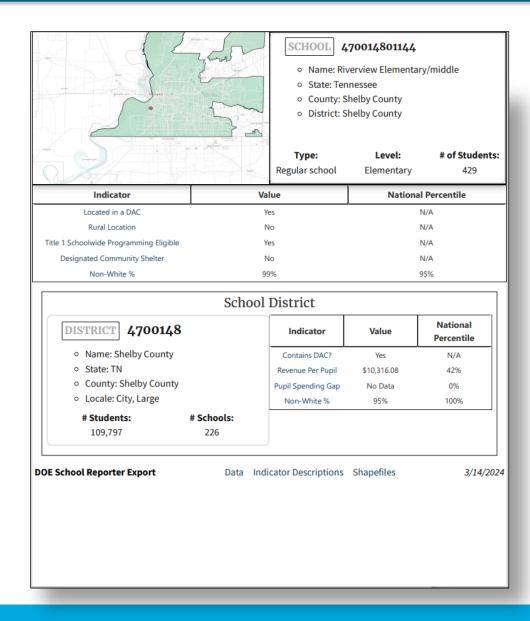
## **Energy Justice Mapping Tool Reports (1.6.2)**

DOE developed the "Energy Justice Mapping Tool for Schools" (<a href="https://energyjustice-schools.egs.anl.gov">https://energyjustice-schools.egs.anl.gov</a>) to help applicants derive relevant needs information on a school-by-school basis.

Competitors must use this tool to generate a report for each school facility within the submission. Find your NCES ID number to easily locate your school(s) and run the report.

Please upload a single .pdf document to <u>HeroX</u> that includes the one-page summary report per school/school facility. For example: if the portfolio has 10 schools, the .pdf document uploaded will be 10 pages long.

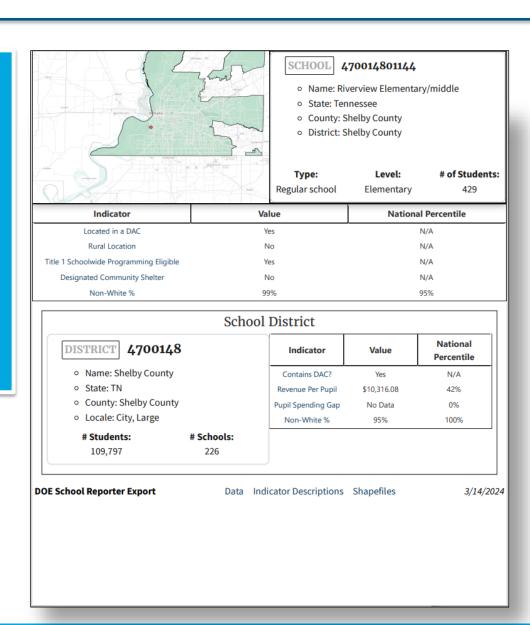
This template can be found on <u>HeroX</u> under the 'Resources' tab.



## **Energy Justice Mapping Tool Update**

DOE updated the Energy Justice Mapping Tool to realign with the Climate and Economic Justice Screening Tool (CEJST) boundaries. However, they noticed that despite boundaries being updated, the mapping report still has discrepancies. The DOE has resolved this issue.

If a school or school district in your portfolio was showing as a Disadvantaged Community (DAC) on the mapping tool map but was not showing as a DAC in the mapping tool report, please re-run the EJ Mapping Tool report.



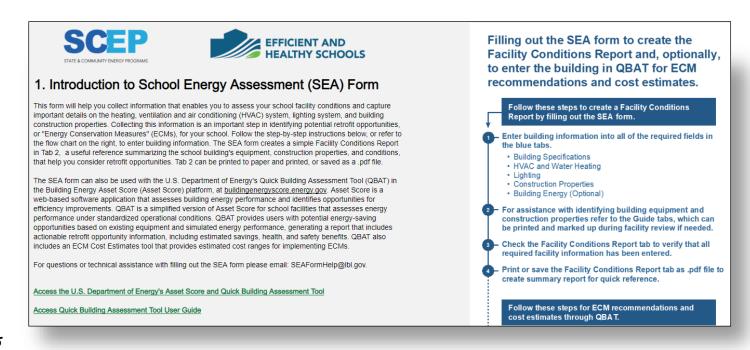
#### School Energy Assessment (SEA Form) Tool Reports (1.6.3)

Competitors must use DOE's School Energy Assessment (SEA) Form to generate a facility condition report, which is a needs assessment of the current condition of the school and school facilities that would receive the energy improvements.

The SEA Form is available for download on HeroX under the 'Resources' tab.

Note: You will need to complete and save one Excel File SEA form for each school/school facility. Combine all Excel files into a Zip folder to upload to HeroX. Please note that HeroX will only accept one file; this should be a Zip file containing 10 + SEA forms.

NOTE: Facility Conditions Reports (including full energy audits or investment-grade audits) are not part of the submission package for the 2024 Renew America's Schools Prize.



- Additional trainings on how to use the form can be found on: <u>School Needs</u> and <u>Benefits Assessment Resources</u> | <u>Department of Energy</u>
- Instructions for creating a Zip file can be found at: <u>PDF and Zip File Resource</u>

### **Other Application Materials**

- □ Community Benefits Plan (CBP)
  - Refer to rules Section 1.6.4
  - Template provided
- Resumes
  - Refer to rules Section 1.6.5
- Letters of Commitment
  - Refer to rules Section 1.6.6
- □ Summary Slide
  - Refer to Section 1.6.7
  - Template provided



[The red (instructions and context) and blue (examples) text throughout the template should be removed in the final version of Community Benefits Plan]

The U.S. Department of Energy (DOE) is providing this template as an administrative convenience for prize competitors. Use of this template is not required; competitors are welcome to provide the requested information in an alternate format. Competitors final CBP should be uploaded in .pdf form, be 6 pages maximum (including cover page) and text should be at least 11-point font.

PURPOSE: The Community Benefits Plan (CBP) sets forth the approach to local engagement, thereby ensuring that Federal investments advance the Department of Energy's priorities:

- Community and labor engagement;
- Investing in quality jobs;
- 3. Advancing diversity, equity, inclusion, and accessibility (DEIA); and
- Contributing to the Justice 40<sup>st</sup> Initiative.

The CBP should indicate the intention to engage meaningfully with community stakeholders in pursuit of these priorities. Meaningful engagement includes, but is not limited to, entering into formal workforce and community agreements. More details can be found in the Prize Rules Appendices B-E. For additional guidance on CBPs, see: <a href="https://www.energy.gov/bil/community-benefits-jeah-frequenth-saked-questions-fasa">https://www.energy.gov/bil/community-benefits-jeah-frequenth-saked-questions-fasa</a>.

Within the CBP, please discuss how these four priorities (CBP Sections 1.0-4.0) will be integrated into the project

#### 0.0 Community Benefits Plan Executive Summary

The competitor should provide a brief overview of anticipated project benefits to local communities including any key highlights from the sections below. Competitors may describe the role(s) that schools/school facilities within the portfolio serve in their communities (e.g., disaster shelters, adult education, afterschool enrichment).

#### 1.0 Community and Labor Engagement

The competitor should describe anticipated engagement with specific stakeholders and organizations.

Competitors should include

- How their organization currently demonstrates community and labor engagement and how this engagement will support the proposed program.
- b. How their team plans to engage with stakeholders. Examples include local governments, tribal entities, labor unions, and community-based organizations that support or work with disadvantaged communities and other affected stakeholders. The table below can be used to succinctly present this information.

Anticipated Stakeholders Anticipated Engagement

<sup>8</sup> The Justice40 initiative, established by E.O. 14008, sets a goal that 40% of the overall benefits of certain federal investments flow to disadvantaged communities. The Justice40 Interim Guidance provides a broad definition of disadvantaged communities [page 2]: <a href="https://www.whitehouse.gov/wp-content/uploads/2021/07/M-21-28.pdf">https://www.whitehouse.gov/wp-content/uploads/2021/07/M-21-28.pdf</a>

2 | 2024 Renew America's Schools Prize - Community Benefits Plan (CBP)

#### **III. Submission Review**

### **Technical Review Criteria (1.7)**



Criterion 1: Need for Planning and Energy Assessments (20%)

Criterion 2: Team Composition, Capability, and Experience (20%)

Criterion 3: Implementation Plan for Phase 2 (20%)

Criterion 4: Impact and Replicability (20%)

Criterion 5: Community Benefits Plan (20%)

All criteria are of equal weight.

Applications will be evaluated against the technical review criteria shown below. All sub-criteria are of equal weight.

#### **Criterion 1: Need for Planning and Energy Assessments (20%)**

The competitor should describe their intended portfolio of schools and school facilities, and their need(s), as measured by the following parameters:

- <u>Facilities</u>: Extent to which schools or school facilities identified in portfolio exhibit a high need for energy assessments and may require energy improvements (e.g., age of school, deferred maintenance, fiscal/capital constraints for facility, services, high energy costs, failing systems, and/or others).
- <u>Community</u>: Degree to which the project is based in and serves a community of high need (e.g., rural, high percentage of students qualifying for free and reduced priced lunch, Tribal, etc.).

Applications will be evaluated against the technical review criteria shown below. All sub-criteria are of equal weight.

#### Criterion 2: Team Composition, Capability, and Experience (20%)

The competitor should introduce their proposed project team and outline the team's core competencies:

- <u>Project team composition</u>: The team has the necessary experience, team members, and relationships to successfully implement their plan (both in energy and financing).
- <u>Experience</u>: The team members have a successful track record within relevant sectors (such as energy efficiency, renewable energy, school infrastructure, financing).
- <u>Commitment</u>: The team has documented that all needed team members will be in place and ready to commit the time needed to accomplish the stated goals for Phase 2.

Applications will be evaluated against the technical review criteria shown below. All sub-criteria are of equal weight.

#### **Criterion 3: Implementation Plan for Phase 2 (20%)**

The competitor should develop their plan for Phase 2 (energy audits/energy assessments, financial analyses, and strategy for implementation of upgrades), addressing:

- <u>Plan</u>: Adequacy, reasonableness, and soundness of the project plan to complete the required Strategic Plan and ASHRAE Level 2 energy audits within the time allotted to Phase 2 (9-12 months).
- Schedule: Likelihood of successfully maintaining schedule proposed for Phase 2 and demonstrate how they will accomplish key milestones towards meeting project goal(s).

Applications will be evaluated against the technical review criteria shown below. All sub-criteria are of equal weight.

#### **Criterion 4: Impact and Replicability (20%)**

The competitor should situate their project within larger sustainability, decarbonization, and clean energy goals, demonstrating how pivotal aspects of their project can be extrapolated to different sites and contexts through strategic use of:

- Partnerships: Extent to which the project strategically leverages partnerships.
- Benefits: The potential benefits in terms of cost savings, air quality improvements, and emissions reductions from full implementation of the project.
- <u>Scalability</u>: Extent to which the project addresses replicability and scalability
  of the project, both within the competitor's LEA and/or by external
  LEAs; Plans to build upon this work within the LEA, disseminate strategies
  and lessons learned to external LEAs, and/or collaborate with other LEAs on
  pursing energy efficiency and renewable energy technologies.

Applications will be evaluated against the technical review criteria shown below. All sub-criteria are of equal weight.

#### **Criterion 5: Community Benefits Plans (20%)**

- <u>Community and Labor Engagement</u>: Extent to which competitor's Community Benefits Plan illustrates project viability and social risk mitigation through community and labor engagement.
- <u>Workforce:</u> Extent to which competitor's Community Benefits Plan illustrates investment in the American workforce.
- <u>DEIA</u>: Extent to which competitor's Community Benefits Plan illustrates diversity, equity, inclusion and accessibility (DEIA) goals.
- <u>J40</u>: Extent to which competitor's Community Benefits Plan illustrates "Justice 40 Initiative" benefits to disadvantaged communities.

# **IV. Cost Share Examples**

# **Example 1 - Potential Cost Share**

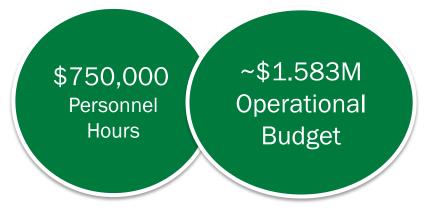
Portfolio size of 10-14 schools

	Federal	Cost Share	Total Costs	Min. Cost Share %
Budget Period 1 (BP1) (Phase 2)	\$500,000	\$26,316	\$526,316	5% <b>M</b> in.
Budget Period 2 (BP2) (Phase 3)	\$7,000,000	\$2,333,333	\$9,333,333	25% Min.

#### Sample Cost Share Breakdown:

BP1 / Phase 2: \$26,316

\$26,316 Personnel Hours BP2/ Phase 3: ~\$2.33 million



# **Example 2 - Potential Cost Share**

Portfolio size of 15-19 schools

	Federal	Cost Share	Total Costs	Min. Cost Share %
Budget Period 1 (BP1) (Phase 2)	\$750,000	\$39,474	\$789,474	5% Min.
Budget Period 2 (BP2) (Phase 3)	\$10,500,000	\$3,500,000	\$14,000,000	25% Min.

#### Sample Cost Share Breakdown:

BP1 / Phase 2: \$39,474

\$25,000 Personnel Hours \$14,474 Operating Budget BP2/ Phase 3: \$3.5 million



# **Example 3 - Potential Cost Share**

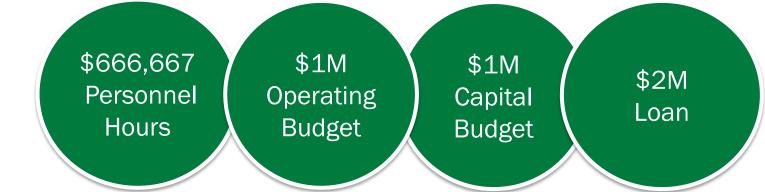
Portfolio size of 20+ schools

	Federal	Cost Share	Total Costs	Min. Cost Share %
Budget Period 1 (BP1) (Phase 2)	\$1,000,000	\$52,632	\$1,052,632	5% Min.
Budget Period 2 (BP2) (Phase 3)	\$14,000,000	\$4,666,667	\$18,666,667	25% Min.

#### Sample Cost Share Breakdown:

BP 1 / Phase 2: \$52,632

\$30,000 Personnel Hours \$20,632 Operating Budget BP 2/ Phase 3: ~\$4.67 million



## **Examples of Funding Across Portfolio**

Portfolio size of 17 schools

#### Phase 1:

• \$300,000

#### Phase 2:

• \$750,000 Federal Funds with \$39,474 cost share

#### Phase 3:

• \$10.5 million Federal Funds with \$3.5 million cost share



Team hired for negotiations and award management to coordinate across district and partners.



Smaller schools 1-8 each receive \$40,000 for audits/planning



Schools 1 – 5 receive \$400,000 each



Larger schools 9-17 each receive \$45,000 for audits/planning



Schools 6 –11 receive \$750,000 each



Overall planning \$64,474



Schools 12-17 receive \$1.25M each

V. Q&A Highlights

## **Q&A Highlights: Application Documents**

QUESTION: In the application, it states, "Competitors must use DOE's School Energy Assessment (SEA) Form to generate a facility condition report." Are we permitted to use option 2, OPTION 2: DOE ASSET SCORE, instead, or are we restricted in conducting our assessment?

Answer: Competitors must use DOE's School Energy Assessment (SEA) Form to generate a facility condition report, to assess the current condition of the school and school facilities that would receive the energy improvements. Competitors are welcome to use the DOE Assest Score/QBAT, and any other tool as necessary, to provide further analysis of energy savings and health impacts which can be referenced in the Technical Narrative.

QUESTION: Are schools required to generate a Quick Building Assessment Tool Report for each site, after completing the School Energy Assessment form? It says this step is optional on the SEA form instructions, but I am unable to find clarification on this step in the provided documents.

Answer: Generating a QBAT report is not required.

**QUESTION**: Is it possible to include attachments and/or appendices to the Phase 1 application?

Answer: Please see Table 3, Section 1.6, Official Prize Rules for page limit requirements which includes any attachments or appendices. Note, the SEA form is required to be in a zip file format.

# **Q&A Highlights: Eligibility**



#### **QUESTION:** Are LEAs with fewer than 10 school/school facilities able to apply?

Answer: Each application must include a minimum of 10 school/school facilities; however, the portfolio may span multiple LEAs and there is no regional limitation or restriction. DOE does not mandate portfolio schools and/or their LEAs to be geographically connected or close.

#### **QUESTION:** Are leased facilities eligible?

Answer: LEAs do not need to hold title to the property but must provide written permission to make the energy improvements. This written permission must be provided in the full application as a Letter of Commitment (Section 1.6 'Submission Package', Official Prize Rules).

# QUESTION: Would administrative or supportive facilities (such as a bus garage) count as eligible facility for the portfolio?

Answer: Per BIL statutory language section (a)(4), energy improvements are required to be at a school or in limited circumstances alternative fueled vehicle infrastructure can be on school grounds. In this example, the bus garage would count towards the minimum portfolio size. While administrative

facilities would be eligible, DOE's preference is to prioritize applications that focus on student-occupied buildings. Please indicate how the energy savings of this building would benefit students and/or the community in your application.



# **Q&A Highlights: Financing**



#### QUESTION: What is the \$300K prize funds for? is that to help the cost share requirement?

Answer: Prize funds are awarded for work already completed. Prize funds are not subject to 2 CFR 200 rules, which means there are no reporting duties or requirements on how funds are used. Prize funds are not eligible for cost share.

#### **QUESTION:** How will funding be disbursed?

OFFICE OF STATE & COMMUNITY ENERGY PROGRAMS

Answer: The Prize Administrator will award a single dollar amount to the designated primary submitter, whether consisting of single or multiple entities. The primary submitter is solely responsible for allocating any prize funds among its member competitors or teammates as they deem appropriate (A.3 Teams and Single-Entity Awards in the Official Prize Rules). Prize winners receive prize money all at once. The Cooperative Agreement (Phases 2 and 3), which is signed by the Prime, operates on a reimbursement basis. This means that Recipients will invoice incurred costs, and DOE will reimburse.



### **Q&A Highlights: Other**



QUESTION: How do LEAs partner with private contractors and consultants for the application process AND address Federal and State public works contracting requirements? Generally, our local LEA cannot solesource work and must put requests for jobs out for bid for projects above \$50K.

Answer: It is incumbent upon the applicant to make an initial determination on the procurement process with a private consultant/contractor based upon whether the for-profit is a subrecipient or contractor as described in 2 CFR 200.331. Applicants must follow their own competitive procurement policies and 2 CFR 200.317-327.

#### QUESTION: As tax-exempt entities, how would the tax credit work?

Answer: Tax-exempt and governmental entities can benefit from certain clean energy investment and production credits using new options enabled by legislation enacted in 2022. We encourage you to visit the IRS website to learn more. <a href="https://www.irs.gov/credits-deductions/elective-pay-and-transferability">https://www.irs.gov/credits-deductions/elective-pay-and-transferability</a>.



- Watch the recording of the DOE's School Program May 7 webinar on how schools can access clean energy and transportation tax credits.
- Register for our upcoming May 30 webinar "Going Deeper on IRA Tax Credits for Schools."

VI. Navigating the Q&A

#### **Put Your Questions in the Chat**

#### Examples of Question Topics:

- Application Documents
- Applicant Eligibility
- Financing
- Evaluation
- Cooperative Agreement (Phases 2 and 3)
- How to Submit
- Prize Application Process
- Teaming/Partnering
- What's changed in this Application

## Have a question?

- 1. Check the Fact Sheet
- 2. Check the Existing Answers on the DOE Q&A Spreadsheet
  - DOE will update the Q&A Spreadsheet weekly, although questions may require additional time for review.
  - Control-F or Command-F to find related questions, or sort by topic
- Submit a question to be answered in the Q&A
  - Email <u>schools@doe.gov</u>
  - Check back for the updated Q&A Spreadsheet on HeroX.

Both the Fact Sheet and Q&A Spreadsheet can be found on the HeroX Resources Tab.

**VII. Conclusion and Key Reminders** 

# What's Next?

- 1. Follow the challenge on the HeroX Prize Platform: <a href="https://www.herox.com/renewschoolsprize">https://www.herox.com/renewschoolsprize</a>
- 2. Read the rules: HeroX  $\rightarrow$  Resources Tab
- 3. Complete your submission package!
- 4. Upload your completed prize submission package by 5 pm ET on June 13, 2024.

American-Made Challenges 2024 Renew **America's Schools Prize** Funding energy efficiency and renewable energy projects at public K-12 schools to lower energy \$6,900,000 Background 2024 RENEW AMERICA'S SCHOOLS OFFICIAL PRIZE RULES March 2024 Submission Due: Thursday, June 13 by 5 p.m. ET

Email <u>renewschoolsprize@nrel.gov</u> with any technology issues.

### **Key Submission Reminders**

- Check entries in HeroX to confirm all materials are submitted.

  Submissions could be deemed ineligible due to an incorrect entry
- DOE strongly encourages competitors to submit 1-2 days prior to the deadline to allow for full upload of application documents and to avoid any potential technical glitches.
- Make sure you click the "submit" button. The "submit" button in HeroX will appear only once all required fields are filled out. Applications can be edited up until the "submit" button is clicked. Changing the application after submitting will un-submit the application until it has been re-submitted
- Keep records of your application as a best practice.

Applications must be submitted by **5 pm ET**June **13, 2024** 

The system will cut off submissions at 5 pm ET.

https://www.herox.com/renewschoolsprize Renewschoolsprize@nrel.gov\_

# THANK YOU

2024 Renew America's Schools Prize
Office Hours #2

U.S. Department of Energy (DOE)

Office of State and Community Energy Programs (SCEP)

