



California Clean Energy Jobs Act Proposition 39 (K-12) Program

Energy Expenditure Plan Online Annual Progress Report

California Energy Commission

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09/17/2015



AGENDA

1. Proposition 39 (K-12) Program Reporting Requirements
2. Annual Progress Report Overview
3. Expenditure Plan Online – Annual Progress Report Process



REPORTING REQUIREMENTS

- Reporting of each approved EEP is required
- Guidelines page 29 – 32
- Reporting will be done using the online system
- Annual Progress Report and Final Project Completion Report
 - This presentation will focus on the Annual Progress Report



ANNUAL PROGRESS REPORT NOTIFICATION

- E-mail notification using Listserv
- E-mail notification directly to the LEA Authorized Representative and Project Manager
- Notification on online system



ANNUAL PROGRESS REPORT TIMELINE

- All Annual Progress Reports must be submitted each year as a condition of your award
- 2014-2015 Annual Progress Report is available now
 - Please submit by December, 2015
- For future fiscal years the Annual Progress Report will be made available in July
 - Please submit by September 31st of the same year



LOG IN PAGE

A screenshot of the California Energy Commission's login page. The page features the CA.GOV logo, the California Energy Commission logo, and navigation links for "EXPENDITURE PLAN" and "ABOUT". A modal window titled "Terms & Agreements" is displayed in the foreground, containing text about system access and privacy. The "Agree" button is highlighted with a red box. Below the modal, there is a "Register" link for users who do not have an account.

CA.gov | Accessibility | Quick Links | Log In

CA.GOV CALIFORNIA ENERGY COMMISSION Environment: Acceptance

EXPENDITURE PLAN ABOUT

Terms & Agreements

The Energy Expenditure Plan Online System (system) is the property of the California Energy Commission (Commission) and may only be accessed by authorized users. Unauthorized access, use, disruption, modification, or destruction of this system is strictly prohibited and may be subject to criminal prosecution and/or adverse action or both.

The Commission may monitor any activity or communications on the system and retrieve any information stored within the system. By accessing and using this system, you are consenting to such monitoring and information retrieval for law enforcement and other purposes.

Users of this system can have no expectation of privacy as to any communication on, or information created, maintained and stored within the system, including information stored centrally, locally on a disk drive, or on removable electronic storage media. In addition to any other available remedies, the penalties for unauthorized access or use may include criminal and/or civil action under the California Information Privacy Act (Financial code section 1798.53) and Penal Code section 502.

Don't have an account?
[Register](#)

- The LEA will need to Agree to the Terms & Conditions to access the online system



REGISTER/LOG IN

Log In

LEA Code

Password

The application locks a user out after 5 failed login attempts.

[Forgot your password?](#)

Keep me logged in

- “Log In” Information

- If the LEA has previously registered and is returning to the system, the LEA can log in with the appropriate LEA Code and Password

- Log In

- Use the Log In button to proceed to the LEA Summary page



LEA SUMMARY

Welcome, Oroville City Elementary | Log Out

CA .GOV CALIFORNIA ENERGY COMMISSION

EXPENDITURE PLAN **PROGRESS REPORT** PROFILE ABOUT

Environment: Acceptance

There are 1 annual report(s), 0 final report(s), awaiting for your attention.

1 LEA Summary 2 Expenditure Plan & Site Summary 3 Review & Submit

Applicant Information

Local Education Agency (LEA) Name:	Oroville City Elementary	LEA CDS Code:	0481507000000		
Address:	2795 Yard Street	City:	Oroville	Zip:	95966-5113

Active Submitted Approved Amendments

No pending energy expenditure plan.

Create New Energy Expenditure Plan

- **Progress Report** - The LEA can navigate to the report section using this link
- **There are 1 annual report(s), 0 final report(s) waiting for your attention -** This is a notification for the LEA if there are pending Annual Progress Reports. The LEA can navigate to the report section using these links



REPORT SUMMARY: NAVIGATION

The screenshot shows the California Energy Commission website interface. At the top right, it says "Welcome, Oroville City Elementary | Log Out". The main navigation bar includes "CA.GOV", the California Energy Commission logo, and the text "CALIFORNIA ENERGY COMMISSION". Below this, there are three main menu items: "EXPENDITURE PLAN" (highlighted with a green box), "PROGRESS REPORT", and "PROFILE ABOUT". A secondary navigation bar below that shows three steps: "1 Report Summary" (highlighted with a red box), "2 Annual Progress Report", and "3 Final Report". Underneath, there is a section titled "Applicant Information" with a table of details.

Local Education Agency (LEA) Name:	Oroville City Elementary	LEA CDS Code:	04815070000000		
Address:	2795 Yard Street	City:	Oroville	Zip:	95966-5113

- **Expenditure Plan** – Use this link to navigate back to the LEA Summary page
- **Report Summary/Annual Progress Report/Final Report** – This shows which section the LEA is working on



REPORT SUMMARY: NAVIGATION (continued)

Local Education Agency (LEA) Name:	Oroville City Elementary	LEA CDS Code:	04010070000000		
Address:	2705 Yard Street	City:	Oroville	Zip:	95966-5113

Annual Report

Energy Expenditure Plan Submission ID: 442		Review EEP
Fiscal Year Energy Expenditure Plan Submitted: 2014-15		
Grant Amount Requested: \$236,972.00		
Project SIR: 1.37		
Approved	Annual report for fiscal year 2014-15	Review Report
Approved	Annual report for fiscal year 2015-16	Review Report
Pending	Annual report for fiscal year 2016-17	Edit Report

- **Review EEP** – Use this link to navigate to review approved EEP (read only)
- **Review Report** – Use this link to navigate to approved/submitted Annual Progress Reports (read only)
- **Edit Report** – Use this link to navigate to an Annual Progress Report to fill out information



ANNUAL PROGRESS REPORT: ANNUAL REPORT SUMMARY PAGE

- 1 Report Summary
- 2 Annual Progress Report
- 3 Final Report

LEA Name:	Oroville City Elementary	Expenditure Plan Submittal Option:	Annual Award Energy Expenditure Plan
LEA Code:	04615070000000	Fiscal Year:	2014-15
Tier:	4	Grant Amount Requested:	\$236,972.00

Energy Manager and Training

	Amount Requested	Amount Spent to Date
Amount Spent for Energy Manager	\$0.00	\$ <input type="text"/>
Amount Spent for Training	\$0.00	\$ <input type="text"/>

Schools/Sites Summary

Status	School/Site Name	CDS Code	Project Spent	Prop 39 Share Spent	
Completed	Wyandotte Avenue Elementary	04615076094957		\$200,000.00	<input checked="" type="checkbox"/> Edit Detail
Estimated Total:				\$200,000.00	

PWC Number(s)

 Add
 789456789 ✖

Type Name of Authorized Representative:	<input type="text"/>	Date	<input type="text"/>
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- Back to Report Summary
- Save Current Process
- Review & Submit

- Blue font indicates reference information from the approved EEP
- Use Save Current Process button to save changes made to the Annual Progress Report



ANNUAL PROGRESS REPORT: ANNUAL REPORT SUMMARY PAGE

Tier: 4 Grant Amount Requested: \$238,972.00

Energy Manager and Training

	Amount Requested	Amount Spent to Date
Amount Spent for Energy Manager	\$0.00	\$ <input type="text"/>
Amount Spent for Training	\$0.00	\$ <input type="text"/>

- **Amount Spent for Energy Manager** – If the LEA requested funds for an energy manager please enter the amount spent to date. If no funds were requested this field will be disabled.
- **Amount Spent for Training** – If the LEA requested funds for training please enter the amount spent to date. If no funds were requested this field will be disabled.



ANNUAL PROGRESS REPORT: ANNUAL REPORT SUMMARY PAGE

Schools/Sites Summary

Status	School/Site Name	CDS Code	Project Spent	Prop 39 Share Spent	
Completed	Wyandotte Avenue Elementary	04615076094957		\$200,000.00	Edit Detail
		Estimated Total:		\$200,000.00	

- **Schools/Sites Summary table lists all sites included in the approved EEP**
- **Edit Detail** – This link will take you to the Site Page to enter progress information for the selected site.
- **Status** – All sites must be in “Completed” status to submit the Annual Progress Report
 - Pending: Additional information required for this site.
 - Completed: All required information has been entered for this site.



ANNUAL PROGRESS REPORT: SITE PAGE

- 1 Report Summary
- 2 Annual Progress Report
- 3 Submit

LEA Name:	Chowchilla Elementary	Expenditure Plan Submittal Option:	Annual Award Energy Expenditure Plan
LEA Code:	20851930000000	Fiscal Year:	2013-14
Tier:	4	Grant Amount Requested:	\$81,465.00

Site Name:	Merle L. Fuller Elementary	CDS Code:	20651936023881	Total Prop39 Share Spent:	
Address:	1101 Monterey Ave.	City:	Chowchilla	Zip:	93810

Estimated Project Start Date:	<input type="text" value="10/01/2014"/>	Estimated Project Completion Date:	<input type="text" value="10/13/2015"/>
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Summary of Progress to Date

LEA has completed design phase for the identified HVAC measure and has begun installation of the 1 mbtu condensing furnace. Installation of programmable thermostats is expected to begin next fiscal year. LEA's contractor has put in purchase order for premium efficiency motor with delivery and installation to occur next fiscal year with completion date estimated for October, 2017.

Energy Efficiency Measure Photovoltaic Project Power Purchase Agreement

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ⓘ	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Replace (15) 20+ yr old AC Units	\$81,465.00		Edit
Total:	\$81,465.00	\$0.00	

Total Prop 39 Share spent to date for Energy Efficiency Measure:	\$ <input type="text"/>
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- Back to Annual Report Summary
- Complete Site
- Save Current Process

- Navigation to measure tables
- Use Save Current Process button to save changes made to the Annual Progress Report
- Use Complete Site when all information is entered
- Use Back to Annual Report Summary to return to the Annual Report Summary Page



ANNUAL PROGRESS REPORT: SITE PAGE

Estimated Project Start Date:	<input type="text" value="10/01/2014"/>	*	Estimated Project Completion Date:	<input type="text" value="10/13/2015"/>	*
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Summary of Progress to Date

LEA has completed design phase for the identified HVAC measure and has begun installation of the 1 mbtu condensing furnace. Installation of programmable thermostats is expected to begin next fiscal year. LEA's contractor has put in purchase order for premium efficiency motor with delivery and installation to occur next fiscal year with completion date estimated for October, 2017.

- **Estimated Project Start/Completion Date** – Please update project start and completion dates as necessary.
- **Summary of Progress to Date** – Provide a narrative of any progress in measure implementation.



ANNUAL PROGRESS REPORT: SITE PAGE

Energy Efficiency Measure Photovoltaic Project Power Purchase Agreement

Energy Efficiency Measure	Measure Cost	Amount Spent to Date	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00	\$200,000.00	Edit
Total:	\$351,862.00	\$200,000.00	


Total Prop 39 Share requested for Energy Efficiency Measure:	\$238,972.00
Total Prop 39 Share spent to date for Energy Efficiency Measure:	\$200,000.00

- **Amount Spent to Date** – For each energy efficiency measure please enter the amount spent to date (cumulative) including grant funds, rebates, other non-repayable funds, and repayable funds. Repeat this process for Photovoltaic and Power Purchase Agreement measures.
- **Total Prop 39 Share spent to date for Energy Efficiency Measure** – Please enter the total Proposition 39 funds spent for all energy efficiency measures (this does not have to equal the total amount spent to date). Repeat this process for Photovoltaic and Power Purchase Agreement measures.



ANNUAL PROGRESS REPORT: SITE PAGE – Entering Amount Spent to Date

1. Select **Edit**

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ⓘ	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00		 Edit
Total:	\$351,862.00	\$0.00	

2. Enter value

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ⓘ	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00	<input type="text" value="200000"/>	✓ Update ✕ Cancel
Total:	\$351,862.00	\$0.00	

3. Select **Update or Cancel**

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ⓘ	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00	<input type="text" value="200000"/>	✓ Update ✕ Cancel
Total:	\$351,862.00	\$0.00	



ANNUAL PROGRESS REPORT: SITE PAGE

Estimated Project Start/Completion Date:

Please correct the following:

- Estimated Project Start/Completion Date cannot be empty.

[Back to Annual Report Summary](#)

[Complete Site](#)

[Save Current Process](#)

- **Complete Site** – When all information is entered use complete site button.
- **Please correct the following** – If any information is missing when the complete site button is selected the LEA is notified. Address any errors and select complete site button.



ANNUAL PROGRESS REPORT: ANNUAL REPORT SUMMARY PAGE

DIR Project ID(s) _____

Add

123456465 ✕

- **If the LEA has a DIR Project ID please provide it by entering the DIR Project ID and selecting Add**
- **A previously added DIR Project ID can be removed by selecting the “x” next to the number**



ANNUAL PROGRESS REPORT: ANNUAL REPORT SUMMARY PAGE

Type Name of Authorized Representative:	<input type="text"/>	Date	<input type="text"/>
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Please correct the following:

- Name of Authorized Representative cannot be empty.
- Authorized Representative signature date completed cannot be empty.

[Back to Report Summary](#) [Save Current Process](#) [Review & Submit](#)

- **Type in the name of the authorized representative and the date the Annual Progress Report is submitted**
- **Select Review & Submit button to submit Annual Progress Report to Energy Commission for review**
- **If any required information is missing when Review & Submit button is selected these are identified to the LEA**



ANNUAL PROGRESS REPORT: SUBMISSION PAGE

- 1 Report Summary
- 2 Annual Progress Report
- 3 Final Report

LEA Name:	Oroville City Elementary	Expenditure Plan Submittal Option:	Annual Award Energy Expenditure Plan
LEA Code:	04815070000000	Fiscal Year:	2014-15
Tier:	4	Grant Amount Requested:	\$238,972.00

➔ Before submitting your annual report...

By answering "No" to the following question...

- If the LEA has not completed the project an Annual Progress Report will be required to document progress over the fiscal year. The Annual Progress Report will be made available to the LEA to document progress until the project is completed.

By answering "Yes" to the following question...

- If the LEA has completed the project a Final Project Completion Report will be made available 12 months after the provided completion date. The LEA will need to fill out the Final Project Completion Report when it becomes available.

Are all the project measures included in this Energy Expenditure Plan completely installed? Date completed

[I Understand & Submit](#) [Cancel & Return to previous page](#)

- Use the drop down selection to indicate if the project is complete (yes) or not complete (no)
- If the project is complete enter the completion date
- Use I Understand & Submit to finalize submission to the Energy Commission.
- Use Cancel & Return to previous page link to return to the Annual Progress Report



REPORT SUMMARY: STATUS

Annual Report

Energy Expenditure Plan Submission ID: 442		Review EEP
Fiscal Year Energy Expenditure Plan Submitted: 2014-15		
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Project SIR: 1.37		
Approved	Annual report for fiscal year 2014-15	Review Report
Approved	Annual report for fiscal year 2015-16	Review Report
Pending	Annual report for fiscal year 2016-17	Edit Report

- The status of each Annual Progress Report can be viewed on the Report Summary
- **Status**
 - Approved: Energy Commission CPM has reviewed and approved the Annual Progress Report
 - Submitted: The LEA has submitted the Annual Progress Report to the Energy Commission for review
 - Pending: The LEA must edit information in the Annual Progress Report and submit to the Energy Commission for review



CALIFORNIA ENERGY COMMISSION

ANNUAL PROGRESS REPORT

Questions?

Prop39@energy.ca.gov

Toll-free in CA (855)380-8722

Toll line outside CA (916)653-0392