

Welcome

Energy Efficiency and Conservation Block Grants (EECBG)

Presenters:

- Bonnie Rouse - Energy Resource Professional
- David LeMieux – Energy Analyst
- John Walden – Energy Analyst
- Neal Ullman – Energy Resource Professional



What Facility Management Feels Like...



EECBG RFA Basic Information

- Funding is from the U.S. Department of Energy State Energy Program - \$1.6M to Montana through formula grant
- Total funding available through this RFA is \$480,000
- Eligible Entities:
 - K-12 public schools
 - Incorporated cities/towns that did not receive a direct EECBG grant
- Up to \$100,000 per award with no project total exceeding \$250,000
- Project must be completed by **Oct 31st** – no time extensions

- Eligible Activities:
 - Energy Efficiency Upgrades / Building and Facility Upgrades
 - Indoor Air Quality Improvements Resulting from Upgrades
- Federal Requirements:
 - Davis Bacon Wages and use of LCPTTracker
- State Requirements depend on project, will be included in contract docs:
 - Hazardous waste inspections
 - Waste disposal requirements
 - Code reviews

LCPTracker

Projects	1. Payroll Records	2. Notices	3. Certification	Reports	eDocuments	Set Up	Daily Reporter	LCPcertified
Payroll record entry form (2 of 2)								
Week End Date:	3/27/2016	Contractor:	Brown Construction Company					
Project:	Test Project	Sub To:						
Employee:	DOE, JANE	Contract ID:						
<input type="checkbox"/> Is Foreman	<input type="checkbox"/> Is Owner/Operator							
Gross Employee Pay This Project (Usually No Fringes)	Wages Paid in Lieu of Fringes (Total Cash Fringes)	Gross Pay All Projects (Sum of all checks entered on deductions)	These fields are Hourly rate fields (Usually No Fringes)			Rate in Lieu of Fringes (Cash Fringes)		
0.000	0.000	0.000	Base Hourly	Overtime Hourly	Doubletime Hourly	0.000		
Classifications								
Jurisdiction	Location	Craft	Classification					
North Dakota DOT	North Dakota Statewide	POWER EQUIPMENT OPERATORS	Group 4 - Articulated/Off Road Hauler, Asphalt Dump Person, Asphalt Paving Scree Operator, Backhoe, up to & including 1/2 cy, Boring Machine Locator, Con-sole Board Operator, Distributor, ... see wage decision for full notes					
Hours Worked Each Day for This Project Only								
	Monday 3/21/2016	Tuesday 3/22/2016	Wednesday 3/23/2016	Thursday 3/24/2016	Friday 3/25/2016	Saturday 3/26/2016	Sunday 3/27/2016	Total Hours
Regular Time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Overtime at 1.5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Double-Time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fringes / Contributions paid to others (not employee) for This Project Only (Rate Times the # of Hours Worked)								
Payroll record entry form (1 of 2)								
Week End Date:	3/27/2016	Contractor:	Brown Construction Company					
Project:	Test Project	Sub To:						
Employee:	DOE, JANE	Contract ID:						
<input type="checkbox"/> Is Foreman	<input type="checkbox"/> Is Owner/Operator							
Gross Employee Pay This Project (Usually No Fringes)	Wages Paid in Lieu of Fringes (Total Cash Fringes)	Gross Pay All Projects (Sum of all checks entered on deductions)	These fields are Hourly rate fields (Usually No Fringes)			Rate in Lieu of Fringes (Cash Fringes)		
0.000	0.000	0.000	Base Hourly	Overtime Hourly	Doubletime Hourly	25.000	37.500	50.000

RFA – Two Phase Application Process

Phase 1 – Draft Application (DA) – not scored

Elements:

- Cover Sheet (see RFA for requirements)
- Scope of Work
- Project Milestones/Timeline
- Budget

Scoring Criteria:

- Aggregated Savings from Energy Conservation Measures
- Simple Payback
- Locale Score
- Community Need/Low Income

Technical Assistance:

- Available from today through noon on Friday February 20. (The RFA will go live in the eMACS system at 2:00pm on February 20):
 - Eligibility
 - Calculations
 - Engineering Review and Recommendations

Draft Application Submittal:

- Must be received by 10:00pm on Sunday, February 8. Send by email to Bonnie Rouse. If the document is too large for email, then the FTP site must be used. Plan ahead!

RFA – Two Phase Application Process Cont.

Phase 2 – Final Application (FA) – scored

- Application opens in eMACS at 2:00pm on Friday, February 20th.
 - DEQ staff no longer able to discuss project or application
 - Same Elements and Scoring Criteria apply
- Submittal and receipt by eMACS by March 6, 2026 at 2:00pm. Register early for eMACS to ensure correct set-up
- DEQ evaluation March 9 – March 13, 2026
- Notice of Status – March 13, 2026
- Contract Negotiation
- Project Period – Contract signature date through October 31, 2026

Application Scoring

Scoring Caveats:

- Scoring is intentionally simplistic
 - Weather normalization, not required
 - Adjustments to baseline energy profile for code compliance, not required
 - Energy savings is estimated using supporting data; any prescriptive or stipulated savings need written DEQ engineer pre-approval
- Only the FA will be scored
- Scoring metric weights shown in Table 3

Table 3: Proposal Scoring Metric

Metric	Scoring Criteria	Scoring Point Allocation (%)
1	Aggregated Energy Conservation Measures	30
2	Project Simple Payback	20
3	Rural NCES Classification	25
4	Low-Income Community Need Classification	25
		Total: 100

Scoring Metric 1: Annual Energy Savings

Table 4: Metric 1 – Aggregated energy Conservation Measures Scoring

Annual Energy Savings	Points
≤30% i.e. reduction from baseline	30
≤20% – 29.9%	22.5
≤10% – 19.9%	15
≤5% – 9.9%	7.5
< 5% or not clearly quantified	0

Examples of Energy Conservation Measures (ECMs):

- Lighting upgrades w/ controls
- HVAC high efficiency equipment improvements: pumps, boilers, VFDs, controls
- Building envelope improvements: door seals, insulation
- Heat recover units, HRVU

Note: There are several methods to compute percent change; the formula above is used for scoring

- 1) Negative Reduction % values indicate projects with energy savings, positive values do not save energy
- 2) The more negative the Reduction %, the higher the energy savings

Scoring Metric 1: Annual Energy Savings Cont.

How to Calculate Metric 1:

- Step 1a: Show utility invoice for all commodities over 12-consecutive months
- Step 1b: Convert all commodities in Step 1a to common energy units of MMBtus
- Step 1c: Sum all the commodities in Step 1b → “Baseline Energy” [MMBtus]

- Step 2a: Show total energy savings from aggregated ECMS
- Step 2b: Convert all commodities in Step 2a to common energy units of MMBtus
- Step 2c: Sum all the commodities in Step 2b → “Total Energy Savings”
- Step 2d: Subtract Step 2c “Total Energy Savings” from Step 1c “Baseline Energy” → “New Energy Profile”

- Step 3: Compute annual energy savings as percent energy reduction from baseline:

$$\text{Reduction \%} = (\text{New Energy Profile} - \text{Baseline Energy}) / \text{Baseline Energy} * 100$$

Note: There are several methods to compute percent change; the formula above is used for scoring

- 1) Negative Reduction % values indicate projects with energy savings, positive values do not save energy
- 2) The more negative the Reduction %, the higher the energy savings

Scoring Metric 2: Simple Payback

Table 5: Metric 2 – Simple Payback Scoring

SIMPLE PAYBACK	POINTS
< 6 years	20
>6 – 9 years	13
>9 – 12 years	6.5
>12 – 15 years	3.3
>15 years	0

How to Calculate Metric 2:

- Step 1: Total project cost [\$] divided by the annual energy savings from all combined ECMs [\$/yr]

$$\text{Simple Payback [yrs]} = \text{Total Project Cost [$]} / \text{Total Annual Energy Cost Savings [$/yr]}$$

Scoring Metric 3: Project NCES Code

Table 6: Metric 3 – NCES Locale Code Score Weights

NCES LOCALE CODE	LOCALE DESCRIPTION	RURAL CATEGORY	POINTS
43	Rural - Remote	Most Rural	25
42	Rural - Distant	Moderately Rural	20
41	Rural - Fringe	Least Rural	15
33	Town - Remote	Not Rural but Isolated	10
32	Town - Distant	Not rural but Somewhat Isolated	5
All Others	Not Rural		0

How to Determine Metric 3:

- Step 1: Goto website:
 - [Locale Lookup](#)
- Step 2: Example - Enter 900 18th St, Havre, MT
- Step 3: Read Locale on upper left of screen e.g. Havre, MT is “33 Town, Remote”, Score = 10 points

Scoring Metric 4: Student Eligibility

Table 7: Metric 4 – Low-Income Community Need

PERCENTAGE OF STUDENTS ELIGIBLE	POINTS
>80%	25
>60% – 80%	20
>40 – 60%	15
>20 – 40%	10
<20%	0

How to Determine Project Metric 4:

- OPI Gems Data Source Method:
 - Step 1: Goto website
 - [School & District Data](#)
 - Step 2: Scroll to School Program – Nutrition and Traffic Education
 - Step 3: Example – Select 2026 for program year, select Hill County, click “Submit.”
View column “% Total Eligible Free/Reduced NSLP,” for Havre High School row; 47.65% = 15 points.

Application Enclosure

Scoring Documentation Recommended Enclosures to pass from DA to FA:

1. 12 consecutive months of utility invoices (all commodities)
2. If applicable, 3 consecutive years of bulk fuel invoice data (e.g. coal, propane).
3. Excel workbook (See example spreadsheet provided on DEQ page)
 - a) Required minimum utility data
 - b) Estimated energy savings
 - c) Energy Savings Calculation (RFA Section 4, Metric 1)
 - d) Simple Payback Calculation (RFA Section 4, Metric 2)
4. PDF of screen shot showing Rural NCES classification (screen shot)
5. PDF of community need classification (screen shot)

Important details

- Final Applications must be submitted through the electronic Montana Acquisition and Contracting System (eMACS)
- Information is available on eMACS on how to register.
- Once the RFA, or “event”, opens on eMACS on February 20th, questions about this RFA will only be answered through the eMACS Q&A board. DEQ staff will not respond to calls or e-mails.

Using eMACS

- eMACS Resources
- If not already registered, click on “Vendor Portal” under the Registration tab
- To find this RFA, click on “State Bids & Proposals” on the left side of the screen and use the keyword search to search for “Department of Environmental Quality”
- The event will include a pdf of the RFA and draft model contract. The application form will be under the “Questions” tab
- Download the application and follow the instructions for a complete application
- Questions about the RFA may be submitted under the “Tools” tab then “Q&A Board”

Funding Contract

Example Contract in RFA – State Boilerplate

Review!

State and Federal Requirements in Contract Body. Examples:
Insurance, federal DBA, BABA, etc.

DEQ does not direct procurement, it is up to sub-recipient to follow applicable requirements

Scope of Work:

- Tasks/Milestones
- Timeline
- Cost
- Deliverables



SOW Example

Task 3: Construction Fees and Costs - \$224,644

Task Description: Purchase and installation of efficient fixtures and controls, and related actives.

- Estimated equipment cost - \$68,585
Requirement for Build America Buy America (BABA) Small Grants Waiver applied due to project costs less than \$250,000.
- Estimated installation and contractor costs - \$71,695
Federal Davis Bacon Act (DBA) wage requirements apply, See Attachment C, Special Terms and Conditions. Term 44. Davis Bacon Requirements Current prevailing wage requirements page.
- Asbestos abatement and clearance testing - \$18,500 estimated
Waste handling documents shall be submitted to DEQ. Any materials meeting definition of hazardous or universal waste shall be handled appropriately with documentation submitted to DEQ.
- Construction management, project management, and other related costs to include overhead, contingency, and gross receipts tax - \$64,864 estimated

Timeline: Target date of June 30, 2025

Outputs/Deliverables: Purchase of installation of equipment, infrastructure repairs, and haz-waste abatement and handling.

Contract Administration

- Payments on a Reimbursement Basis, final 10% held until all required documentation is submitted and accepted by DEQ
- Expect Monthly Invoicing
- Documentation Expectations:
 - Invoice Details
 - LCP Tracker entries, if applicable
 - Inspections (asbestos and others), if applicable
 - Code Inspections and Approvals, if applicable
 - Waste Handling, if applicable (ballasts and bulbs are HW)
 - Invoice Details
 - Letter of project acceptance



**Assistance with asbestos inspection and remediation may be available, also lead pipe replacement at K-12 schools*

Questions and Answers

- Draft Applications due February 8th
- Final Applications due March 6th

- **Final Applications must be submitted via eMACS**
- **Questions during the Final Application Phase must be submitted via the eMACS Q&A Board**



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Thank you!

Contact:
Bonnie Rouse

