Please note: There are several links embedded within this document. Simply look for the underlined words and look for phrases inside of a box of thin, black lines to access the links.

Available links include email and social media contacts, links to the CISF documents referenced, and links to websites with more information about the funding sources.
Facilities Funding:
Looking for Money in All the Right Places

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Director of Communications and Facilities

Springfield Public Schools

Monday, February 27, 2012
Sources of Funding

- Bond Funds
- Capital Funds
- Loans
- State Grants
- Federal Grants
- City Grants
- Energy Incentives
- Tax Credits
- Private Foundations / Donations
City Grants
Community Development Block Grant

- Annual grant program (via HUD) to support development needs
- School grants include playground improvements, parking projects, and social service center upgrades

Energy Efficiency and Conservation Block Grant

- Encourages energy efficiency among cities and counties
City Grants

Community Development Block Grant

4-Year Total: $165,390

Energy Efficiency and Conservation Block Grant

Total: $137,200
• Funds projects in the Portland metro area that preserve or enhance natural features on public land

• Projects must either purchase land or make improvements to real property with an ending value of at least $50,000

• The 2012 deadline has passed (January 9), but look for the 2013 applications in December 2012
Tax Increment Financing (TIF)

• School districts can partner with their local government to set up an Urban Renewal Area to capture TIF funding

• Important requirements of TIF spending include:
  • Blight must be demonstrated in the URA
  • No more than 25 percent of the city may be included in the URA
  • Tax Increment Generators must be in the URA
  • TIF dollars must be spent within the URA
  • TIF dollars must be spent on “bricks and mortar” projects

Proceed immediately to “Go” and collect TIF funding.
Tax Increment Financing (TIF)

• School districts are held harmless by TIF standards so although income tax dollars are lost, the State allocates the same amount of funding to the district from a different source

• More information can be found at: www.econw.com
State Grants
State facility funds typically come from sources available to all public agencies.

**Seismic Upgrades** - Oregon Office of Emergency Management

**State Energy Program** - Oregon Dept. of Energy

**School Facility Improvement Fund** - Oregon Dept. of Education

**Cool Schools** - Oregon Dept. of Energy

**Safe Routes to School** - Oregon Dept. of Transportation

**Transportation and Growth Management** - Oregon Dept. of Transportation
Seismic Upgrades

- The Seismic Rehabilitation Grant Program was created to strengthen public schools and emergency services buildings in the event of an earthquake.

- The first three rounds of this program have been awarded.

- Advocating for an extension of the program and authorization for additional funding is a legislative priority of the CISF.

Total: $249,822
State Energy Program

• Congress created the Department of Energy's State Energy Program in 1996 by consolidating two other programs

• Funds are disbursed to states via formula and competitive grants

• Projects must increase energy efficiency or reduce energy costs

• Funding for this program is still available; however, the State may not allocate it in the same way as previous years

Total: $67,000
State Energy Program

- Congress created the Department of Energy's State Energy Program in 1996 by consolidating two other programs.

- Funds are disbursed to states via formula and competitive grants.

- Projects must increase energy efficiency or reduce energy costs.

ARRA Formula Funds: $42,182,000  
Non-ARRA Formula Funds: $319,000 annually
School Facility Improvement Fund

OAR 581-023-0230

• Districts are eligible to receive a facility grant for a new school building in the year the new school building is first used for instruction for more than half of the district's regular school year or the following year.

• Facility grants equal a percentage of new school building construction costs as determined by statute ORS 327.008/13.

• Funds are to be used to furnish and equip the new school - not for capital construction costs.

• Applications must be received at the Department of Education no later than February 15 of the school year following the school year in which the new school building is first eligible for the facility grant.

Total: $1,292,979
Cool Schools Program

• Schools in non-SB1149 districts had energy audits performed as part of the governor’s School Energy Audit Initiative

• Districts, especially non-SB1149 districts, can tap into low-cost financing through the Cool Schools initiative to finance the projects identified during the audits

• For early consideration, submit loan documents by early April; final submission deadline is May 31, 2012
• SRTS is a federally-funded program administered by state transportation departments

• The two categories of funding are infrastructure (engineering improvements) and non-infrastructure (education, encouragement) projects

• The purposes of the program are:
  1. to enable and encourage children, including those with disabilities, to walk and bicycle to school
  2. to make bicycling and walking to school safer and more appealing
  3. to facilitate the planning, development, and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption, and air pollution in the vicinity of elementary and middle schools (Grades K-8)
• Assists local governments (including schools in partnership with local gov’t.) develop transportation system plans

• Included are bike and pedestrian plans, capital improvement plans, parking plans and more

• Proposals must include a minimum of 11 percent local matching funds

• 2012 Pre-Application due March 16

• 2012 Full Application due June 15
Secure Our Schools

• Annual grant from the U.S. Dept. of Justice’s Community Oriented Policing Services (COPS) office

• A partnership with the local police department allowed the district to apply

• A minimum 50 percent cash match is required

Fix America’s Schools Today (FAST)

• Proposed legislation that would fund the repair of public schools
Loans
Qualified Zone Academy Bonds  
(U.S. Department of Education)

- QZAB funds are for renovations, repairs and other improvements (no new construction)

- Interest is covered by the federal government as a tax credit

- QZAB funding is allocated to each state for distribution

$1,595,012
Qualified School Construction Bonds

- QSCB funds were initiated by the American Recovery and Reinvestment Act (ARRA)

- QSCB funds can be used for the construction, repair and equipping of schools and purchase of land

- QSCB funding was allocated to each state for distribution

$3,000,000
• The ODOE finances small scale, local energy projects through the sale of bonds

• The Cool Schools program uses SELP loans for districts not eligible for SB1149 funds

• Typically $20,000 to $20 million in financing

• Funding levels for 2012 SELP loans are unknown, ODOE will announce Phase II in early 2012
Statewide Revolving Loan Fund
PROPOSED LEGISLATION

• Pre-development grants and loans are available for infrastructure - schools are not defined as such

• In order to become eligible, schools need a legislative policy determination that “schools are infrastructure”

• Currently, the development of a $1 - $5 million Revolving Loan Fund for schools is under discussion
Utility Provider Incentives

• Calculated based on expected energy savings

• Funding can be used to complete the project

• Funding can also be used to invest in additional energy saving measures

10 Year Total: $548,178
Energy Cost Savings

- Not only do utility providers often offer incentives, but districts can save substantial costs on energy use.

2003 - 2011 Lighting Energy Savings

- Annual KwH: 3,589,226
- Annual Cost: $142,495

Monday, February 27, 2012
Senate Bill 1149 Districts

• Funds available to districts within the PGE and PacifiCorp service areas

• The utilities collect a public-purpose charge and must distribute funds for energy projects in public schools

• The Cool Schools program uses SB1149 funds in combination with low-interest loans
Energy Efficiency Incentives
Energy Trust of Oregon

- Participants must be customers of PGE, Pacific Power, Northwest Natural Gas, or Cascade Natural Gas
- Incentives are available on existing buildings or new construction
- Solar systems are also included in the available incentives
Tax Credits
The Oregon Department of Energy offered the Business Energy Tax Credit for investments in energy conservation, recycling, renewable energy resources and less-polluting transportation fuels.

The BETC program has undergone significant changes in the past year.

Total: $120,000
Energy Incentive Program

• The new energy incentive program offers several categories of funding

• The two categories most likely to apply to school projects are Renewable Energy and Conservation

• Available funding is less than under BETC, but opportunities open throughout the year
Private Foundations & Donations
• Foundations are a potential source of income for capital projects, especially athletic fields

• Potential sources include Lowe’s, Home Depot and others

• Commonly used for small-to-medium sized projects
Solar 4R Schools
Bonneville Environmental Foundation

• Elementary or secondary schools nationwide may apply for grants to install photovoltaic systems

• Grants cover 33 percent of the total cost for larger projects, up to $20,000

• Deadlines are rolling

• Visit www.b-e-f.org for more information
Additional Strategies
Keys to Facility Funding

• Know what funding sources are “in the pipeline”

• Develop key relationships

• Look for funding beyond your typical sources

• Follow the money

Most vital step to secure funding
Keys to Facility Funding

• Advocate for funding that will positively impact your district

• Prioritize and pre-plan so that you can take advantage of short notice opportunities

• Capital for Capital Policy
Sample Capital-for-Capital Policy

Any proceeds from the sale of land, buildings or other real property should be placed in a separate fund dedicated to land purchase and capital improvement projects for facilities in a “Capital for Capital” strategy.
The Role of Advocacy

- Many of these funding opportunities were made available only after lawmakers were made aware of the need, including:
  - Cool Schools
  - Seismic Rehabilitation
- Utilizing your key relationships to advocate for facilities funding is vital to obtaining funding opportunities
Questions?

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