

Center for Innovative School Facilities



Financial Toolkit

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Grants

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Bonneville Environmental Foundation
Solar 4R Schools

Background

The Bonneville Environmental Foundation (BEF) was established in 1998 to support programs in the areas of renewable energy and watershed restoration. BEF funds projects that use renewable energy from solar, wind, and biomass.

The Solar 4R Schools program was created to educate schools and communities on the importance of solar electric power.

Local Grant Recipients

Lincoln High School, in the Portland School District, is the ninth project in BEF's Solar 4R Schools program, and one of four metro area schools to receive solar electric panels from the Bonneville Environmental Foundation (BEF), Energy Trust of Oregon, and Portland General Electric (PGE) during the first quarter of 2005. For more information, click [here](#).

Eligibility

Elementary, middle, or high school or any other organization with a significant youth education emphasis in any region is encouraged to submit an application to BEF.

Application Process

- Include the following information:
 - Organization Name
 - Title of proposed project (facility where the PV system will be installed)
 - Mailing Address
 - Street Address
 - Primary Contact Person
 - Renewable Energy Technology (select "solar" for school PV projects)
 - Type of Organization
 - Interconnecting Utility (the facility's utility provider)
 - Total Estimated Project Cost and Amount Requested from BEF
 - Project Contact Information
 - Applicant's Statement
- For more information about the application process, please click [here](#).

Deadlines

- Q1: Applications received between 12/16 and 3/15
 - Notification on or before 6/30
- Q2: Applications received between 3/16 and 6/15
 - Notification on or before 9/29
- Q3: Applications received between 6/16 and 9/15
 - Notification on or before 12/28
- Q4: Applications received between 9/16 and 12/15
 - Notification on or before 3/31

Typical Grant Amount: Grants typically do not exceed \$20,000 for standard demonstration-scale photovoltaic projects of 33% of the total cost for larger projects.

Contact Information

Bryce Smith
Renewable Energy Project Manager
240 SW 1st Avenue
Portland, OR 97204
(503) 248-1905
grants@b-e-f.org
<http://www.b-e-f.org>

The Kresge Foundation
Green Building Initiative

Background

The Kresge Foundation awards grants in the areas of education, construction or renovation of facilities, community development, and environmental preservation. The Foundation supports elementary and secondary **schools that predominately serve students with physical and/or developmental disabilities.**

The Kresge Foundation Green Building Initiative awards **planning grants for sustainable design.** Grants are issued for the following projects:

- Renovation
- Historic Preservation
- New construction designed to achieve LEED (Leadership in Energy and Environmental Design)
- New construction designed to meet the Cascadia Region Green Building Council's Living Building Challenge
- New construction designed to be net-zero energy efficient

Planning grants cover these costs:

- Professional consultation
- Energy analysis and modeling
- Water use analysis and modeling
- Ecological site planning
- Commissioning expenses associated with the planning process
- Initial documentation and LEED registration with the U.S. Green Building Council

Local Grant Recipients:

Northwest Family Services in Portland was recently awarded a \$200,000 grant for facilities capital funds.

Eligibility

- 501(c)(3) organizations that are not classified as private foundations
- Elementary and secondary schools that predominately serve students with physical and/or developmental disabilities

Application Process

Application includes cover letter and building plans. For more information, please consult the [Kresge Foundation website](#)

Deadlines: Rolling basis

Typical Grant Amount: \$50,000 to \$100,000

Contact Information:

Grants Inquiry Coordinator
(248) 643-9630
info@kresge.org

Oregon Department of Transportation
Transportation and Growth Management Grants to Local Governments

Background

The Transportation and Growth Management (TGM) Program provides resources to help Oregon communities prepare transportation and land use plans to respond to pressing transportation-related growth management issues. Pending legislative approval, up to \$5 million will be available for grants to local jurisdictions for the 2007-2009 biennium.

Eligibility

Cities, counties, some special districts, councils of governments (COGs) (working on behalf of member governments), tribal governments, metropolitan planning organizations (MPOs) and Metro.

TGM awards two types of grants:

Category 1. Transportation System Planning

Purpose	Help local governments (including schools) develop transportation system plans and plan updates and ordinances that implement the Transportation Planning Rule and the 1999 Oregon Highway Plan.
Eligible Uses	<p>Projects in this category address planning for transportation facilities that result in a balanced, multi-modal system that addresses and accommodates a range of transportation needs, including movement of freight. These projects typically include preparation and adoption of:</p> <ul style="list-style-type: none">• Complete Transportation System Plans (TSP),• Discrete portions of TSPs, including such elements as: bike and pedestrian plans, transit plans, capital improvement plans, demand management plans, parking plans, etc.;• TSP implementing measures such as street design plans, capital improvement plans, and ordinance amendments required by OAR 660-012-0045;• Refinement plans included in an adopted TSP such as corridor plans, access management plans, interchange management plans, or other planning to implement the 1999 Oregon Highway Plan;• Project-level planning for facilities or improvements included in an adopted TSP that results in resolving important transportation and land use issues required to move projects toward funding consideration.• Detailed access and circulation planning to improve readiness of key employment centers.
Examples	www.oregon.gov/LCD/TGM/docs/examples-Category1.doc

Category 2. Integrated Land Use & Transportation Planning

Purpose	<p>Help local governments address transportation needs by adopting changes to land use and transportation system plans in order to:</p> <ul style="list-style-type: none">• Bring planned land uses and the planned transportation system into balance;• Reduce reliance on state highways for local travel needs;• Promote transportation-efficient development patterns that support compact, mixed-use, pedestrian-friendly development;• Increase opportunities for transit, walking and cycling.
Eligible Uses	<p>Projects in this category integrate land use planning with transportation facility planning to meet transportation needs. Category 2 projects may include preparation and/or update and adoption of:</p> <ul style="list-style-type: none">• Policies and alternative land use plans for an entire urban area, consistent with OAR 660-012-035(5)(c) for metropolitan areas and OAR 660-012-035(2) for non-metropolitan areas;• Specific development/redevelopment and refinement plans for a downtown area, other commercial or mixed use area, residential neighborhood, etc., including amendments to plan policies;• Comprehensive plan implementing measures, such as code amendments, infill and redevelopment strategies, and intergovernmental agreements.
Examples	<p>www.oregon.gov/LCD/TGM/docs/examples-category2.doc</p>

Application Process

For more information on the application process, please consult the [TGM website](#).

Deadlines

The last application deadline was March 9, 2007. Stay tuned for 2008-2009 deadlines.

Contact Information

Bob Cortright
(503) 373-0050, ext. 241
bob.cortright@state.or.us
<http://www.oregon.gov/LCD/TGM/grants.shtml>

The City of Portland
Green Investment Fund

Background

The City of Portland's Green Investment Fund (GIF) **awards grants to green building concepts in the commercial, residential, industrial, and mixed-use building sectors.** GIF is a partnership consisting of the City of Portland's Office of Sustainable Development, Bureau of Water and Environmental Services, and the Energy Trust of Oregon.

GIF supports concepts and designs to help projects achieve **exemplary green building** and sustainable **site development measures**:

1. Energy efficiency and on-site renewable power generation
2. Material use reduction, recycling, salvage, and reuse
3. Water conservation and non-potable water utilization
4. Rain and stormwater management and improving watershed health

Local Grant Recipients:

- da Vinci Arts Middle School - To accommodate growth at da Vinci Arts Middle School, Portland Public Schools will build the first net-zero energy, LEED Platinum, freestanding classroom in the nation. This 900 square foot "classroom of the future" showcases many green building strategies including daylighting, natural ventilation, photovoltaic roof shingles, non-toxic materials and control systems that minimize the size of the mechanical and electrical systems. (portlandonline.com)

Eligibility

- Applicants can be individuals, non-profit organizations, corporations, LLCs, or partnerships.
- The project must be located in the city limits of Portland
- The project site must be secured

For more information, please consult the [City of Portland GIF website](#).

Application Process

- Description of the project and how it addresses each of the GIF's "Core Goals, Performance Targets and Preferred Strategies."
- Description of the specific measures and activities for which a GIF grant is sought.
- Outline the development process.
- Demonstrate how the GIF and other resources will be used to realize your project concept.

For more information on the application process, click [here](#).

Deadlines: Last application due date was February 4, 2008. Check back soon for more 2008 and future 2009 deadlines.

Grant Award Amounts: Up to \$425,000

Contact Information:

Kyle Diesner
City of Portland Office of Sustainable Development
721 NW 9th Ave, Suite 350
Portland, OR 97209
Tel: 503-823-4166
kdiesner@ci.portland.or.us

Nature in Neighborhoods

Background

Nature in Neighborhoods funds projects in the Portland metropolitan area that **preserve or enhance natural features and their ecological functions on public lands in neighborhoods**, and help ensure that every community enjoys clean water and nature as an element of its character and livability. **Those that may apply include schools, neighborhood associations, community groups and other nonprofit organizations, cities, counties and public park providers.** Projects must either purchase land or make improvements to real property that results in a capital asset with a life of at least 20 years and with a total value of at least \$50,000

Local Grant Recipients:

- Northwest Family Services in Portland was recently awarded a \$200,000 grant for facilities capital funds.

Eligibility

- Neighborhoods and community groups, nonprofit organizations, schools, cities, counties and public park providers.

Application Process

For more information on the application process, please consult the [Nature in Neighborhoods website](#)

Deadlines: Last application deadline was May 28, 2008. Check back soon for more 2008 and future 2009 deadlines.

Typical Grant Amount: unspecified

Contact Information:

Mary Rose Navarro
(503) 797-1781
maryrose.navarro@oregonmetro.gov

Oregon Department of Energy
Business Energy Tax Credits (BETC)

Background

Oregon's Business Energy Tax Credit (BETC) is for **investments in energy conservation, recycling, renewable energy resources, sustainable buildings, and less-polluting transportation fuels. Any Oregon business may qualify**, including but not limited to, manufacturing plants, stores, offices, apartment buildings, farms, and transportation. The tax credit can cover costs directly related to the project, including equipment cost, engineering and design fees, materials, supplies and installation costs. Loan fees and permit costs also may be claimed. However, replacing equipment at the end of its useful life or equipment required to meet codes or other government regulations are not eligible. Maintenance costs are also not eligible.

Under the pass-through option, a project owner may transfer a tax credit to a pass-through partner in return for a lump-sum cash payment (the net present value of the tax credit) upon completion of the project. The Pass-through Option allows **non-profit organizations, schools, governmental agencies, tribes, other public entities and businesses with and without tax liability to use the BETC by transferring their tax credit for an eligible project to a partner with a tax liability.**

Projects that use solar, wind, hydro, geothermal, biomass, or fuel cells (renewable fuels only) to produce energy, displace energy, or reclaim energy from waste may qualify for a tax credit. Renewable resource projects must replace at least 10% of the electricity, gas or oil used. The energy can be used on site or sold.

- **Incentive Type:** Corporate Tax Credit
- **Eligible Efficiency Technologies:** Lighting, Heat Recovery, Caulking/Weather-stripping, Duct/Air sealing, Building Insulation, Comprehensive Measures/Whole Building
- **Eligible Renewable/Other Technologies:** Passive Solar Space Heat, Solar Water Heat, Solar Space Heat, Solar Thermal Electric, Photovoltaics, Landfill Gas, Wind, Biomass, Hydroelectric, Renewable Transportation Fuels, Geothermal Electric, Geothermal Heat Pumps, CHP/Cogeneration, Hydrogen, Industrial Waste, Refueling Stations, Ethanol, Methanol, Biodiesel, Fuel Cells using Renewable Fuels
- **Applicable Sectors:** Commercial, Industrial, Construction, Multi-Family Residential, Schools, Equipment manufacturers
- **Amount:** 50% of eligible project costs, distributed over five years (10% per year)
- **Maximum Incentive:** \$20 million for renewable energy equipment manufacturing facilities. \$10 million for other projects

Case Study: Hillsboro School District ([click here](#))
Hermiston School District ([click here](#))

For applications and instructions, ([click here](#))

Contact Information:

Oregon Department of Energy
625 Marion Street NE
Salem, Oregon 97301
(503) 378-4040 or 1-800-221-8035
<http://www.oregon.gov/ENERGY/CONS/BUS/BETC.shtml>

Energy Trust of Oregon
Business Energy Efficiency Incentives for Existing Buildings

Background

Energy Trust of Oregon offers incentives to companies (commercial, agricultural, and institutional – **including schools**) that increase the energy efficiency of their existing buildings.

The standard incentive program provides cash incentives for non-custom equipment with easy installation, including high-efficiency electric motors and drives, lighting equipment and lighting controls, heat pumps, air conditioners, radiant heat, insulation, domestic hot water, boilers, steam traps, as well as equipment specific to the food service and lodging industries. To be eligible for standard incentives, projects must be pre-approved before making any equipment purchases or initiating any work. Details on Energy Trust’s standard incentives can be found at: www.energytrust.org/existingbuildings/standard.

Customers retrofitting existing buildings through measures not covered under the standard incentive program can still receive financial assistance from Energy Trust through the custom incentive program. Custom incentives for projects involving non-lighting equipment are approved up to 35 percent of the total approved cost, not to exceed 20¢/annual kilowatt-hours (kWh) saved and \$1/therm saved. To qualify for a custom incentive, the energy savings must be at least 25 percent of the current energy use for lighting equipment and 10 percent for all other equipment and measures. Details on Energy Trust’s custom incentives can be found at: www.energytrust.org/existingbuildings/custom.

Both custom and standard incentives for existing buildings are capped at \$500,000 per site, per year. Participants must be customers of Portland General Electric, Pacific Power, NW Natural or Cascade Natural Gas and must also pay the public purpose charge on their energy bills.

Solar incentives for existing buildings

Incentives are also available for installation of solar energy systems. Energy Trust offers \$6.00/therm or \$0.40/kWh for solar water heating systems and \$1.50/therm solar pool heating systems. Solar electric incentives vary based on the size of the system and the electric utility and can be as high as \$175,000 for public buildings including schools. To avoid a large capital investment, a school may seek to purchase solar electricity from a third party that installs, owns and operates a solar electric system on the school. Details on Energy Trust’s solar incentives can be found at: <http://energytrust.org/solar/index.html>.

Energy Trust cash incentives can be combined with state and federal tax credits for energy efficient and solar energy systems.

Contact Information

Building Energy Solutions — Existing Buildings
Energy Trust of Oregon, Inc.
621 SW Morrison Street, Suite 550
Portland, Oregon 97205
1-877-510-6800
buildings@energytrust.org
www.energytrust.org/eb

Energy Trust of Oregon
Business Energy Efficiency Incentives for New Buildings

Background

Energy Trust of Oregon offers incentives to commercial, and institutional entities – **including schools**, that design and build new buildings that substantially exceed commercial building codes. High efficiency, sustainably designed buildings are good for communities and the planet. Energy Trust provides cash incentives of up to \$465,000 per project for a new construction or major renovation project that is more energy efficient and environmentally friendly. Incentives are available for energy modeling, commissioning and high-efficiency equipment.

Energy Trust's New Buildings program offers incentives through four different program tracks: Standard, Custom, ENERGY STAR® and LEED®-NC. For more information on each track, visit: www.energytrust.org/newbuildings.

Standard Track provides incentives for electrical equipment for: lighting and lighting controls, heat pumps, motors, variable speed drives, demand control ventilation, air conditioning, chillers, domestic hot water, natural gas heating equipment and foodservice equipment. Incentives of up to \$100,000 are available for projects that pursue measures that are eligible under the Standard Track. Energy Trust also provides technical assistance to maximize energy savings potential. For details on incentive offerings by measure type, check the Standard Track workbook on the Energy Trust's New Buildings program Web site.

Custom Track provides cash incentives for the installation of buildings systems that are more energy efficient than those installed to meet minimum Oregon code requirements/standards in the same type building with similar occupancy. Incentives of up to \$300,000 per project are available based on the first year, annual electric and gas savings estimates/calculations. The estimated energy savings are determined through an energy model or energy analysis. Incentives are available at the following rates:

1. New Construction Projects: \$0.10 per kilowatt hour and \$0.80 per therm
2. Major Renovation Lighting Measures: \$0.15/kWh, up to 30 percent of eligible project cost, not to exceed 100 percent of incremental cost
3. Major Renovation Non-lighting Measures: \$0.20/kWh and \$1/Therm, up to 35 percent of eligible project cost, not to exceed 100 percent of incremental cost.

Additional incentives are available for technical assistance and commissioning. Standard Track and Custom Track incentives, including technical assistance and commissioning, can be combined for a total incentive of up to \$465,000.

ENERGY STAR Track offers incentives to eligible new building projects that achieve the ENERGY STAR building performance certification from the U.S. Environmental Protection Agency (EPA). ENERGY STAR Track incentives provide \$2,000 to \$30,000 per project. Qualifying projects use two ENERGY STAR tools, Portfolio Manager and Target Finder, to document energy savings in a new building.

LEED® NC Track provides incentives for new construction projects registering for certification with the US Green Building Council (USGBC) LEED NC program. Incentives of up to \$300,000 per project are determined through one of the following two ways: 1) For projects for which the USGBC awards Energy & Atmosphere Credit 1 points prescriptively, incentives are determined by the number of Energy & Atmosphere Credit 1 points awarded to the project or 2) By the estimated energy savings determined by the energy analysis that is submitted to USGBC in pursuit of Energy & Atmosphere Credit 1 points.

Solar Incentives for New Buildings

Incentives are also available for installation of solar energy systems. Energy Trust offers \$6.00/therm or \$0.40/kWh for solar water heating systems and \$1.50/therm solar pool heating systems. Solar electric incentives vary based on the size of the system and the electric utility and can be as high as \$175,000 for public buildings including schools. To avoid a large capital investment, a school may seek to purchase solar electricity from a third party that installs, owns and operates a solar electric system on the school. Details on Energy Trust's solar incentives can be found at: <http://energytrust.org/solar/index.html>.

Energy Trust cash incentives can be combined with state and federal tax credits for energy efficient and solar energy systems.

Contact Information

Building Energy Solutions — New Buildings
Energy Trust of Oregon, Inc.
851 SW Sixth Avenue, Suite 1200
Portland, Oregon 97204
866-368-7878
newbuildings@energytrust.org
<http://www.energytrust.org>

Portland - Green Building Policy and LEED Certification

Background

The Green Building Policy requires that new construction and major renovations of all city facilities meet the Certified level of LEED. All city-owned, occupied, existing buildings must achieve LEED for existing buildings at the Silver level.

Other requirements for city owned construction projects include:

- 75% of all construction and demolition (C&D) waste must be recycled
- 30% beyond City of Portland's Stormwater Management Manual baseline code requirements
- 30% water savings beyond the Energy Policy Act of 1992 baseline code requirements
- 30% energy savings beyond Chapter 13 of the Oregon Structural Specialty Code baseline requirements
- Building commissioning as required by the State Office of Energy to be eligible for the Sustainable Building Business Energy Tax Credit
- All tenant improvements to City-owned facilities must be LEED for Commercial Interiors (CI) Silver and/or G/Rated Tenant Improvement Guide certified
- All new City-owned facilities should include an ecoroof with at least 70% coverage and high reflectance, Energy Star-rated roof material on any remaining non-ecoroof roof surface area; or, Energy Star-rated roof material when an integrated ecoroof/Energy Star-rated roof is impractical

All new commercial or mixed-use buildings over 10,000 square feet that receive financial assistance from the PDC totaling more than \$300,000 and 10% of the total cost must achieve LEED NC Silver certification.

Note that the state's Business Energy Tax Credit (BETC) can be claimed for buildings rated LEED Silver and higher, providing an incentive to developers and building owners to design and build to the LEED Silver standard.

- **Incentive Type:** Energy Standards for Public Buildings
- **Eligible Efficiency Technologies:** Comprehensive Measures/Whole Building
- **Applicable Sectors:** Commercial, Industrial, Residential, Schools, Local Government, Construction, Low-Income Residential, Institutional, Facilities built or funded by the City of Portland
- **Requirement:** All new city-owned projects must achieve LEED Gold certification. All city-owned, occupied, existing buildings must achieve LEED for Existing Buildings at the Silver level

Contact Information

Alisa Kane
Portland Office of Sustainable Development
721 NW 9th Ave, Suite 350
Portland, OR 97209
(503) 823-7082
akane@ci.portland.or.us
<http://www.portlandonline.com/osd>

Tax Increment Financing (TIF) and Schools

A popular alternative financing method for new development is setting up an Urban Renewal Area to capture Tax Increment Financing (TIF). “When property is improved, its value rises and taxes generated at the site increase. The difference between the taxes generated before and after the investment in the property is called the tax increment. TIF uses the annual increment to finance a portion of the costs the improvements made.”¹ The Urban Renewal Council could allocate a certain percentage of the property tax to the school and create a mechanism that would allow them to invest the tax increment into the redevelopment of the city.

The process of setting up an Urban Renewal Area (URA) begins with a finding of blight. Blight can be declared for a variety of reasons (for more information, see ORS 457), but does not require the strict scrutiny that it once did. Blight can be declared if it is decided that the area in question was poorly planned. Once a finding of blight has been declared, an Urban Renewal Council must be set up to manage the process. In many cases, the City Council also acts as the Urban Renewal Council. Before defining the Urban Renewal Area boundaries, all taxing jurisdictions must be consulted. Not all taxing jurisdictions must sign off on the project, but some are required depending on the district (See ORS 457 for more information).

Normally, it takes nine months to set up a URA. Before the URA is defined, an Urban Renewal Plan and Report must go through a public process. Also required is a Financial Report that clearly shows the reasons for expecting Tax Increment Generators (new developments that yield higher property taxes) to produce a certain amount of money. It is important that these reports give a clear direction to the project, without restraining the Council too much.

Important requirements of TIF spending include:

- Blight must be demonstrated in URA
- No More than 25% of the City can be included in the URA
- Tax Increment Generators must be in the URA
- TIF dollars must be spent within the URA
- TIF dollars traditionally must go toward “bricks and mortar” projects (there are exceptions, but professional consultation is necessary to get around these rules)

A common myth about TIF funding is that it ends up hurting schools. It is true that schools districts lose the money that they are normally allocated from income taxes, but that lost money is given back to them by the state because school district are “held harmless” by TIF standards. The school district ends up with all of the money they had before accepting TIF money, it just comes from a different source.

The money resulting from the URA can be split almost any way that is politically feasible. There are too many variables in the process to address every aspect of TIF. It is recommended that the City and School District co-finance a TIF feasibility study, which should cost less than \$10,000. ECONorthwest and Tashman Johnson both have experience setting up URAs in a variety of settings.

When starting the TIF process, it is important to have a realistic sense of the amount of money Tax Increment Generators will yield and to keep in mind political sensitivities in the community.

¹ Marks, Larry. “The Evolving Use of TIF.” Development Strategies, Inc. www.cdfa.net

TIF financing should only be pursued if it is believed that establishment of the URA will increase value in the larger community.²

Contact Information

Abe Farkas
ECONorthwest
888 SW 5th Ave, Suite 1460
Portland, OR 97204
503-222-6060
<http://www.econw.com>

² CISF wishes to thank Abe Farkas of ECONorthwest for his generosity in helping with the TIF section of the report

Outline for Lending Oregon Bankers Association

Basis: A good pre-development process – especially one including a feasibility statement- is an essential part of every major project. Banks currently require these studies to be done before making certain development loans. In other words, if a loan is necessary to do the needed pre-development work, school districts should be requesting them and banks should then be willing to finance them.

To determine if a loan and/or type of loan is needed:

- Is the loan only needed to front the funds prior to tax collection?
- Are their restrictions about using their general funds for pre-development projects?
- Is there a restriction or timing issue?

In seeking a loan to fund the pre-development work, a school district needs to be able to **answer the following:**

- What is the need? Why are you seeking the loan?
- How is the district going to pay the bank back? What is the source of repayment and what is the secondary source of repayment if the primary source goes away?
- Who is authorized to encumber the district?
-

Paperwork the school district needs to provide includes:

- Annual reports (3 years worth if available);
- Audited financial statements;
- Current budget.

Summary Points:

- There is little concern that a school district would have trouble getting a loan from a bank. Today, many banks do this for cash flow purposes (funding prior to tax collection).
- One of the best things a school district can do is to have a banker serve on a committee dealing with feasibility studies, etc. The banker will have a good perspective as to why this is critical to the success of a project.
- Once a school district embraces spending their resources on pre-development costs, and determines that a loan is preferable to paying for it with their existing dollars, the district should visit with their local banker about financing options and the lending process for which there will be a number of options.

Proposed
Statewide Revolving Loan Fund

Background

While there are pre-development funds (both grants and loans) available for infrastructure, schools are not currently defined as such and therefore are not eligible. Currently, it is not considered politically feasible to add schools to the current funding mechanisms without legislative policy determination that “schools are infrastructure.”

Proposed

The development of a \$1,000,000-5,000,000 Revolving Loan Fund is currently under discussion. It would allow a district to capitalize pre-development costs including design, engineering, programming, environmental services and other pre-bond services. Payment mechanisms including deferral and interest only are still in the discussion stage. It is expected that the fund structure and policies will be in a preliminary form and ready for review by the end of the year.

For more information contact ruth@innovationpartnership.org

Oregon Department of Energy
Small-Scale Energy Loan Program (SELP)

Background

The Oregon Small-Scale Energy Loan Program (SELP) is administered by the Oregon Department of Energy after voters approved a constitutional amendment authorizing the sales of bonds to finance small scale, local energy products. The sale of bonds is made on a periodic basis and, occasionally, to accommodate a particularly large loan request.

The program offers **low-interest loans** for projects that:

- Save energy
 - Produce energy from renewable resources such as water, wind, geothermal, solar, biomass, waste materials, or waste heat
 - Use recycled materials to create products
 - Use alternative fuels
 - Reduce energy consumption during construction
-
- **Incentive Type:** State Loan Program
 - **Eligible Efficiency Technologies:** Water Heaters, Lighting, Chillers, Boilers, Heat pumps, Air conditioners, CHP/Cogeneration, Heat recovery, Programmable Thermostats, Energy Management, Systems/Building Controls, Caulking/Weather-stripping, Duct/Air sealing, Building Insulation, Windows, Motors, Irrigation, Wastewater treatment
 - **Eligible Renewable/Other Technologies:** Pass Solar Space Heat, Solar Water Heat, Solar Thermal Process Heat, Photovoltaics, Landfill Gas, Wind, Biomass, Geothermal Electric, Municipal Solid Waste, CHP/Cogeneration, Small Hydroelectric, Renewable Fuels
 - **Applicable Sectors:** Commercial, Industrial, Residential, Nonprofit, Schools, Local Government, State Government, Tribal Government, Federal Government, Rural Electric Cooperative
 - **Amount:** Typically \$20,000 to \$20 million

Case Study: [North Santiam School District](#)

Contact Information:

Kathy Estes
Oregon Department of Energy
625 Marion Street, NE
Salem, OR 97301-3737
(503) 378-5048
Kathy.estes@state.or.us
<http://egov.oregon.gov/energy>

Neighborhood Partnership Fund
Oregon Community Development Collaborative

The Oregon Community Development Collaborative (OCDC) is a combination of the Neighborhood Partnership Fund, Enterprise Community Partners, and Oregon Housing and Community Services Department. The OCDC strives to create positive community change and improve the quality of life for low and moderate-income households in Oregon.

OCDC invests in community-based development organizations that demonstrate the ability to affect physical and social change in their communities.

OCDC grants are for activities supporting the development of **affordable housing** and **organizational development** that meet all of the requirements of the HOME program and Enterprise.

Applicants are encouraged to use these grants to support activities that strengthen the long-term viability of organizations. This could take many forms, including:

- **Partnerships and/or collaborations** with the intent to create efficiencies, realize cost savings, and/or demonstrate innovation in the development/preservation/maintenance of affordable housing;
- **Strategic planning, fundraising**, or other efforts to increase organizational viability and financial stability
- Activities that align your organization with and allow you to participate in strategic priority initiatives including but not limited to:
 - Preservation
 - Resident services
 - Permanent supportive housing

Eligibility

- Incorporated and in good-standing as an Oregon 501(c)(3) non-profit organization;
- Serving a low-income constituency and geographic area;
- Committed to a primary mission focused on the provision of affordable housing;
- Demonstrated track record and expertise to successfully complete community development projects;
- Accountability to a low-income community or constituency by providing a structure for low-income beneficiaries to participate in the organization's decisions regarding the development, operation of projects, and organizational activities; and
- Received OCDC funding for the 2007-2008 grant year.

For more information, please consult the [Neighborhood Partnership website](#).

Application Process:

For more information on the application process, click [here](#).

Deadlines

Last application due date was May 5, 2008. Check back soon for upcoming 2008 and future 2009 deadlines.

Grant Award Amounts: Up to \$50,000

Contact Information:

The Neighborhood Partnership Fund

Amy Fauver

1020 SW Taylor Street, Suite 680

Portland, OR 97205

afauver@tnpf.org

<http://www.portlandonline.com/osd/index.cfm?c=42134>

Enterprise Foundation
Green Communities

Background

Enterprise offers grants to help **cover the costs of planning and implementing green components of affordable housing developments**, as well as tracking their costs and benefits. Grants cover planning and construction expenses, including costs of architectural work, engineering and site surveys. Costs associated with items such as a more efficient HVAC system, green materials, and energy efficient appliances are also covered by grants. Green Communities grants are made part of a package of favorable financing intended to improve the feasibility of integrating green building items throughout affordable housing developments. Funds may be used for:

- Planning expenses related to the integrated design process including the additional costs of architectural work, charrette, engineering, site surveys, analysis of energy use, and environmental reviews.
- Green construction items.
- Costs of an architect's certification that has met the Green Communities Criteria, as well as costs of any other third-party assistance in certifying a development.
- Costs of tracking the incremental cost (if any, and not to exceed \$3,000) of implementing individual items in the Criteria; this tracking will be required.
- Third-party costs of establishing systems and tools for property management and resident education, to maximize the benefits of the green measures once the property is operating.

Eligibility

- 501(c)(3) nonprofits; public housing authorities; tribally designated housing entities; for-profit entities; and for-profit entities participating through joint ventures with qualified organizations.
- The applicant and the development team must demonstrate their qualifications to successfully carry out the proposed development.

For more information, please consult the [Enterprise website](#).

Application Process

For more information on the application process, click [here](#).

Deadlines: Rolling basis

Grant Award Amounts: Up to \$50,000

Contact Information:

Northwest (Oregon, Washington, Idaho, Montana)
Melissa Peterson (503) 553-5646