

Chebeague Island School Committee

Tuesday, March 11th, 2025

Chebeague Island School

Regular Meeting 6:00 PM

THIS MEETING MAY BE RECORDED

REGULAR MEETING AGENDA

1. Call to Order
2. Approval of Agenda for March 11th, 2025
3. Approval of Minutes for School Committee Meeting of March 4th, 2025
4. Public Comment
5. Correspondence
6. Reports
 - A. Report from School Committee Chair
 - B. Report from Superintendent
 - C. Report from Lead Teacher
7. Old Business
 - A. Second read and approval of 2025-2026 Chebeague Island School Department calendar.
 - B. Second read of FY26 Chebeague Island School Department budget.
8. New Business
 - A. Buildings and Grounds Sub Committee Report
9. Warrant
10. Items for next meeting
11. Adjournment

Chebeague Island School Committee
Tuesday, March 4th, 2025
Chebeague Island School

Workshop 5:30 PM Regular Meeting 6:00 PM

WORKSHOP MINUTES

1. FY26 Budget discussion with Chebeague Island Select Board

The workshop began at 5:35pm. The Chair of the Selectboard shared their status of the budget development process and anticipated capital challenges ahead for the town. The Superintendent of the school department then shared the current anticipated budget changes for FY26 on the school side. There were a number of questions asked by Selectboard members and a discussion of the status of the combined municipal audit. The workshop ended at 6:19pm.

REGULAR MEETING MINUTES

1. Call to Order

The meeting was called to order at 6:25 p.m. by Vice Chair Nancy Earnest. Caitlin Henningsen and Erin Layng were present. Jeff Putnam and Geoff Summa were absent.

2. Approval of Agenda for March 4th, 2025

Erin Layng made a motion to approve the agenda. Seconded by Caitlin Henningsen. The motion passed 3-0-0.

3. Approval of Minutes for School Committee Meeting of February 26th, 2025

Nancy Earnest made a motion to approve the minutes from February 4th, 2025. Seconded by Caitlin Henningsen. The motion passed 2-0-1. EL abstained as she was absent on February 4th.

4. Public Comment

NONE

5. Correspondence

The Superintendent shared two items of correspondence. The first was from MEA Benefits Trust which was notifying members of rate increase for insurance for FY26 of as much as 17.89%. This is not a final figure and will be updated later this spring. The other correspondence was from the US Department of Education about the REAP grant. It was informing us of the upcoming application period and timelines as well as confirming our continued eligibility.

6. Reports

A. Report from School Committee Chair

NONE

B. Report from Superintendent

The Superintendent discussed meeting schedule challenges with the committee due to member commitments over the next month. The March 18 meeting is tentatively rescheduled to March 11th.

C. Report from Lead Teacher

NONE

7. Old Business

A. Review FY26 Chebeague Island School District Budget and debrief workshop

The School Committee members discussed the workshop with the Selectboard. One issue that was discussed was around building understanding of our tuition model for mainland students for island residents. The members discussed how to address this in the May 14th Budget Forum. The other issue discussed around the budget was to insure there were sufficient funds allocated for substitute costs in case needed in FY26.

8. Executive Session

A. To discuss labor negotiations per 1 M.R.S.A §405(6)(D)

A motion was made by Nancy Earnest to enter into executive session to discuss labor negotiations per 1 MRSA §405(6)(D). Seconded by Erin Layng. The motion passed 3-0-0.

A motion was made by Nancy Earnest to exit the executive session. The motion passed 3-0-0.

9. Warrant

There was a warrant for FY25 for approval.

10. Items for next meeting

The next regular meeting is Tuesday March 11th, 2025 at the Chebeague Island School. The regular meeting will start at 6:00pm.

11. Adjournment

The meeting adjourned at 7:38pm.

Respectfully Submitted,

Aaron Townsend
Superintendent

DRAFT

Chebeague Island School Committee

Regular Meeting Agenda Item

Topic: 2025-2026 Chebeague Island School Academic Calendar

Purpose: Approve the 2025-2026 Chebeague Island School Academic Calendar

Date: March 11th, 2025

Background: This draft of the academic calendar for Chebeague Island School for 2025-2026 is based on this year's calendar as well as the draft Yarmouth School District 2025-2026 calendar draft.

Key highlights of this draft:

- The first day of school remains the Tuesday after Labor Day, September 2nd, 2025.
- Winter break will be a full two weeks because of the timing of the Christmas and New Years holidays.
- The last day of school is Friday June 12th, 2026. If there are any snow days, school would extend into the following week.

Recommendation: Approve the 2025-2026 Chebeague Island School Academic Calendar

Attachments: 2025-2026 CIS Academic Calendar

Chebeague Island School Calendar 2025 - 2026

August/September				
M	T	W	T	F
25	TWD	TWD	TWD	29
H	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

S 21 T 24

Aug 26, 27, 28 - No School - Teacher Workshop Days

Sept 1 - No School - Labor Day

Sept 2- First Student Day PK-6

October				
M	T	W	T	F
		1	2	3
6	7	8	9	TWD
H	14	15	16	17
20	21	22	23	24
27	28	29	30	31

S 21 T 22

Oct 10 - No School - Teacher Workshop Days

Oct 13 - No School - Indigenous Peoples' Day

November				
M	T	W	T	F
3	4	5	6	7
10	H	12	13	14
17	18	19	20	21
24	25	TFD	H	H

S 16 T 17

Nov 11 - No School - Veterans' Day (Observed)

Nov 27- No School - Teacher Flex Day

Nov 28 & 29 - No School - Thanksgiving Break

December				
M	T	W	T	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	1/2 day
22	23	24	H	26
29	30	31		

S 15 T 15

Dec 19 - 1/2 day. Dismiss at 11:30

Dec. 22-Jan 2 - No School - Holiday Break

January				
M	T	W	T	F
			H	2
5	6	7	8	9
12	13	14	15	16
H	20	21	22	23
26	27	28	29	30

S 19 T 19

Jan 1 - No School - New Year's Day

Jan 19 - No School - Martin Luther King Day

February				
M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
H	17	18	19	20
23	24	25	26	27

S 15 T 15

Feb 16- No School - President's Day
Feb 17-20 - No School - Winter Break

March				
M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

S 22 T 22

April				
M	T	W	T	F
		1	2	3
6	7	8	9	10
13	14	15	16	TFD
H	21	22	23	24
27	28	29	30	

S 16 T 17

Apr 17 - No School - Teacher Flex Day
Apr 20 - No School - Patriots' Day
Apr 21-24 - No School - Spring Break

May				
M	T	W	T	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
H	26	27	28	29

S 20 T 20

May 25 - No School - Memorial Day

June				
M	T	W	T	F
1	2	3	4	5
8	9	10	11	12
TWD	TWD	17	18	H
22	23	24	25	26
29	30			

S 10 T 10

June 12 - Last Student Day - Students dismissed at 11:30 am

June 15, 16 - No School - Teacher Workshop Days

175 Student Days , 183 Teacher Days

*Add one day of school for each student no-school/storm day taken.

Chebeague Island School Committee

Regular Meeting Agenda Item

Topic: FY26 CISD Budget Updates

Purpose: Review updates to the FY26 CISD Budget

Date: March 11th, 2025

Background: Please find attached to this memo an updated draft of the FY26 budget for the Chebeague Island School Department based on recent School Committee discussions.

Budget Updates:

- The assumptions for insurance coverage have been increased from 10% to 15% based on the recent MEA Benefits Trust communication.
- The salaries for the administrative assistant, kitchen manager, custodian, Ed Tech, and bus driver now reflect a 10% increase from FY25.
- The course reimbursement object code (8401) has been increased slightly based on additional conversation with staff.

Recommendation: Review budget updates and provide any additional feedback.

Attachments: FY26 Budget Summary (Updated 3.7.25)
FY26 Proposed Expenditures (Updated 3.7.25)

**Chebeague Island School Department
FY26 Budget Summary**

March 7th, 2025

	FY 2025	FY 2026	\$\$ difference	Percent Change
Revenue				
State Contribution (ED279)	\$67,427.54	\$82,281.35	\$14,853.81	22.03%
Meals Reimbursement	\$0.00	\$10,000.00	\$10,000.00	
Reserves	\$20,000.00	0	-\$20,000.00	
Tuition	\$0.00	\$30,000.00	\$30,000.00	
IDEA Local Entitlement	\$0.00	\$9,000.00	\$9,000.00	
Revenue Total	\$87,427.54	\$131,281.35	\$43,853.81	50.16%
Expense				
School Debt and Contingency	\$117,923.00	\$37,456.72	-\$80,466.28	-68.24%
Systems Administration	\$129,083.00	\$142,134.79	\$13,051.79	10.11%
School Administration	\$30,497.00	\$33,467.12	\$2,970.12	9.74%
Elementary Education	\$526,243.00	\$467,573.23	-\$58,669.77	-11.15%
Staff/ Student Support	\$35,451.00	\$33,704.11	-\$1,746.89	-4.93%
Special Education	\$224,890.00	\$257,271.20	\$32,381.20	14.40%
Facilities	\$64,060.00	\$62,028.54	-\$2,031.46	-3.17%
Transportation	\$122,319.00	\$90,326.53	-\$31,992.47	-26.15%
Food Services	\$35,704.00	\$42,028.54	\$6,324.54	17.71%
Expenditure Total	\$1,286,170	\$1,165,990.76	-\$120,179.24	-9.34%
Required Local Contribution	\$1,198,742	\$1,034,709.41	-\$164,033.05	-13.68%

Chebeague Island School Department
FY26 Proposed Expenditures
 March 7th, 2025

	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8000 School Debt and Contingency						
8807 Contingency	0.00	1,321.00	0.00	10,000.00	10,000.00	0.00
8900 Debt Service	133,478.00	131,797.74	134,363.73	107,923.00	27,456.72	-80,466.28
Total	133,477.49	131,797.74	134,363.73	117,923.00	37,456.72	-80,466.28
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8001 Office of the Superintendent						
8101 Superintendent Salaries	30,918.00	32,136.00	31,493.28	70,000.00	72,800.00	2,800.00
8102 Secretaries Salaries	12,644.81	13,452.18	13,225.07	15,300.00	16,568.86	1,268.86
8103 Health Insurance	10,233.00	10,641.36	9,133.80	16,676.00	27,629.88	10,953.88
8104 FICA/Medicare	2,400.56	2,518.49	2,470.36	5,315.00	5,944.04	629.04
8106 Worker's Compensation	0.00	2,772.60	3,544.85	4,000.00	4,000.00	0.00
8107 Conferences/Training	200.00	0.00	245.00	1,500.00	500.00	-1,000.00
8108 Other Professional Services	0.00	18,817.64				0.00
8110 Communications/Telephone	2,482.00	2,184.36	2,593.36	2,500.00	3,000.00	500.00
8111 Postage	122.00	245.85	602.39	400.00	0.00	-400.00
8112 Advertising	299.00	519.68	693.17	700.00	700.00	0.00
8113 Printing	308.00	858.45	498.81	500.00	0.00	-500.00
8114 Copier Supplies	100.00	24.19	277.94	300.00	0.00	-300.00
8115 Equipment/Software	21.00	2.99	0.00	300.00	300.00	0.00
8116 Travel			0.00	100.00	100.00	0.00
8117 Stipends	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	0.00
8118 FICA			0.00	92.00	92.00	0.00
8119 Legal	3,359.00	582.40	2,336.88	3,500.00	3,500.00	0.00
8120 Insurance	2,785.00	2,785.00	0.00	3,400.00	3,000.00	-400.00
8121 Dues & Fees	533.00	400.00	524.37	500.00	500.00	0.00
8122 Miscellaneous	478.00	669.80	0.00	800.00	800.00	0.00
8124 Unemployment Compensation	1,818.00	1,585.32	1,532.56	2,000.00	1,500.00	-500.00
Total	0.00	0.00	70,371.84	129,083.00	142,134.79	13,051.79
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8002 Office of the Principal						
8201 Administrative Salaries	30,882.65	32,136.00	34,064.16	0.00	0.00	0.00
8202 Secretary Salaries	12,645.00	13,452.18	13,878.16	15,300.00	16,568.86	1,268.86
8203 Health Insurance	10,232.05	10,641.36	9,133.80	11,676.00	7,247.90	-4,428.10
8204 FICA/Medicare	2,399.00	2,518.74	2,649.90	1,171.00	1,350.36	179.36
8207 Conferences	140.00	0.00	0.00	500.00	0.00	-500.00
8208 Postage	53.00	82.95	0.00	100.00	500.00	400.00
8209 Printing	370.77	941.03	100.44	500.00	1,000.00	500.00
8210 Supplies	302.00	222.31	353.32	300.00	1,000.00	700.00
8211 Copier Supplies			16.38	200.00	300.00	100.00
8212 Equipment/Repair			0.00	250.00	0.00	-250.00
8213 Dues & Fees	372.00	0.00	425.00	500.00	500.00	0.00
8217 Stipends					5,000.00	5,000.00
Total	0.00	0.00	60,621.16	30,497.00	33,467.12	2,970.12
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8003 Elementary Education						
8300 Pre-K Program	30,004.00	0.00	63,709.28	0.00	0.00	0.00
8301 K-2 Teacher's Salaries	34,428.64	53,054.12	90,322.10	86,431.00	89,532.45	3,101.45
8302 3-5 Teacher's Salaries	64,513.00	66,852.93	12,183.52	103,781.00	107,749.95	3,968.95
8303 Ed Tech Salaries	55,872.56	25,767.76	24,736.75	23,929.00	25,125.45	1,196.45
8304 Temporary Salaries	0.00	45.00	0.00	2,000.00	2,000.00	0.00
8305 Health Insurance	40,929.00	32,810.86	20,094.36	29,190.00	34,663.85	5,473.85
8306 FICA/Medicare	10,117.00	8,347.84	11,749.92	12,678.00	14,525.47	1,847.47
8309 Assessment Testing	0.00	500.00	0.00	500.00	2,000.00	1,500.00
8310 General Supplies	3,534.00	1,750.32	3,682.36	5,000.00	4,000.00	-1,000.00
8311 Travel Reimbursement	393.00	376.71	0.00	750.00	750.00	0.00
8312 Books & Periodicals	754.00	1,013.65	697.13	1,500.00	3,000.00	1,500.00
8313 Audio-Visual Materials	21.00	30.82	440.00	500.00	500.00	0.00
8314 Equipment						0.00
8316 Copier Lease	368.00	597.34	119.59	0.00	0.00	0.00

8318 MS Tuition	107,695.16	115,310.07	67,686.25	45,726.00	17,836.60	-27,889.40
8319 Secondary Tuition	193,128.00	188,383.50	243,947.86	214,258.00	165,889.46	-48,368.54
Total	0.00	0.00	539,369.12	526,243.00	467,573.23	-58,669.77
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8004 Student and Staff Support						
8401 Course Reimbursement	35.00	3,199.00	0.00	6,396.00	3,200.00	-3,196.00
8402 Other Professional Services	70.00	0.00	-200.00	1,000.00	300.00	-700.00
8403 Other Professional Services	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	0.00
8404 Technology Equipment	21.00	68.16	198.56	500.00	0.00	-500.00
8405 Other Purchased Services	2.99	5.98	750.94	1,000.00	0.00	-1,000.00
8406 Software	98.00	759.90	28.97	1,000.00	1,000.00	0.00
8407 Repair	0.00	199.94	0.00	200.00	200.00	0.00
8408 Regular Stipend	0.00	6,000.00	7,800.00	19,500.00	23,520.00	4,020.00
8409 FICA/Medicare			0.00	1,155.00	1,484.11	329.11
8413 Supplies			144.83	0.00	0.00	0.00
8414 Books & Periodicals			0.00	100.00	0.00	-100.00
8415 Regular Salaries			0.00	500.00	0.00	-500.00
8419 Supplies	9.00	80.50	76.55	100.00	0.00	-100.00
Total	0.00	0.00	12,799.85	35,451.00	33,704.11	-1,746.89
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8005 Special Education						
8501 Teacher's Salaries	25,445.00	12,276.56	22,072.32	64,444.00	62,102.25	-2,341.75
8502 FICA/Medicare	3,228.11	1,650.79	976.54	5,232.00	10,648.40	5,416.40
8503 Ed Tech Salaries	0.00	15,139.20	7,064.96	23,929.00	62,906.70	38,977.70
8504 Worker's Compensation	0.00	0.00	0.00	500.00	0.00	-500.00
8505 Test Scoring	6,481.00	5,918.86	867.68	0.00	0.00	0.00
8506 Other Professional Services	5,903.96	23,772.50	85,751.04	42,800.00	66,600.00	23,800.00
8507 Extended Year Program	0.00	3,310.00	1,721.25	6,460.00	3,500.00	-2,960.00
8508 Supplies	36.00	37.67	179.95	250.00	1,500.00	1,250.00
8509 Testing Supplies	154.00		1,502.00	250.00	250.00	0.00
8510 Books & Periodicals	91.48	52.74	0.00	100.00	100.00	0.00
8515 Health Insurance	1,620.02	4,212.05	867.68	17,514.00	34,663.85	17,149.85
8517 Special Educ. Transportation	7,110.00	600.00	29,978.74	0.00	0.00	0.00
8518 SpEd Middle School Tuition	51,019.00	35,078.00	0.00	57,740.00	0.00	-57,740.00
8519 SpEd Secondary Tuition	0.00	4,600.00	0.00	5,671.00	15,000.00	9,329.00
Total	0.00	0.00	150,982.16	224,890.00	257,271.20	32,381.20
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8006 Facilities and Maintenance						
8601 Regular Salaries	14,891.19	13,223.72	14,236.52	15,812.00	16,732.10	920.10
8602 Health Insurance	5,116.00	5,320.68	4,566.90	5,838.00	6,932.77	1,094.77
8603 FICA/Medicare	1,265.72	2,793.85	1,477.77	1,210.00	1,363.67	153.67
8606 Conferences			199.48	500.00	500.00	0.00
8607 Other Contracted Services	7,845.00	10,114.65	10,577.69	10,000.00	11,000.00	1,000.00
8608 Repair & Maintenance	1,477.00	11,126.66	5,439.91	7,500.00	7,500.00	0.00
8609 Rent for Building CIRC	8,000.00	8,000.00	8,000.00	0.00	0.00	0.00
8611 Insurance	2,433.00	2,340.00	2,785.00	2,500.00	3,000.00	500.00
8612 Supplies	1,948.00	1,278.97	344.96	2,500.00	3,000.00	500.00
8613 Electricity	2,693.00	382.08	648.55	4,000.00	2,000.00	-2,000.00
8614 Fuel Oil	2,576.00	3,289.01	4,410.05	4,200.00	5,000.00	800.00
8617 Contracted Services	2,200.00	4,272.50	850.00	10,000.00	5,000.00	-5,000.00
Total	0.00	0.00	53,536.83	64,060.00	62,028.54	-2,031.46
	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8007 Transportation and Buses						
8701 Salaries	23,336.00	24,141.67	28,543.69	27,536.00	22,617.65	-4,918.35
8702 Substitute Salaries			0.00	500.00	500.00	0.00
8703 Health Insurance	10,233.00	11,528.14	9,133.80	11,676.00	13,865.54	2,189.54
8704 FICA/Medicare	1,201.66	1,241.96	1,589.77	2,107.00	1,843.34	-263.66
8707 Purchased Professional Service	62,034.00	57,457.65	51,991.82	62,000.00	40,000.00	-22,000.00
8708 Repairs	9,390.00	8,938.64	7,119.66	10,000.00	5,000.00	-5,000.00
8709 Auto Insurance	2,159.00	2,140.00	0.00	2,500.00	2,500.00	0.00
8711 Fuel	4,108.00	4,946.93	3,311.63	6,000.00	4,000.00	-2,000.00
Total	0.00	0.00	101,690.37	122,319.00	90,326.53	-31,992.47

	FY22	FY23	FY24	FY25	FY26	
	Actual	Actual	Actual	Budget	Proposed	Difference
Dept: 8008 Food Services						
8801 Regular Salaries	16,280.00	18,098.56	17,607.83	19,104.00	16,732.10	-2,371.90
8802 Health Insurance	5,117.00	5,320.68	6,393.66	5,838.00	6,932.77	1,094.77
8803 FICA/Medicare	1,320.33	1,384.58	1,336.67	1,462.00	1,363.67	-98.33
8805 Other Contracted Services	1,818.00	919.56	3,011.06	1,800.00	2,000.00	200.00
8806 Supplies	6,059.00	6,693.37	8,872.76	7,500.00	15,000.00	7,500.00
Total	0.00	0.00	37,221.98	35,704.00	42,028.54	6,324.54

Chebeague Island School Committee

Regular Meeting Agenda Item

Topic: Buildings and Grounds Sub Committee Report

Purpose: Update the School Committee on the work of the sub committee

Date: March 11th, 2025

Background: The Buildings and Grounds Sub Committee was formed in October 2024 and is comprised of the following members:

- Nancy Earnest (School Committee)
- Geoff Summa (School Committee)
- Jen Howard (Parent)
- Genaro Balzano (Kitchen Manager/Custodian)

The sub committee was charged with developing a proposal for replacement of the school's boiler with heat pumps and the development of a facilities maintenance plan.

The sub committee has met monthly since its inception. The sub committee developed a facilities audit protocol and has nearly completed this process. This audit will inform the overall facilities and capital equipment maintenance plan. We anticipate this being complete by May 2025.

Additionally, the sub committee has been working on getting quotes for heat pump retrofitting. With the help of the Climate Action Intern on the island, Ellie Hughes, we are currently pursuing the 'School Retrofit Funding Opportunity Notice (FON)' from Efficiency Maine. The deadline for a proposal is March 31, 2025 and work must be completed by November 30, 2025. The School Retrofit FON would cover up to 85% of invoiced costs along with credits for the equipment.

We are soliciting proposals from four vendors for this work:

- Haley's Metal Shop
- Casco Bay Heat Pumps
- Dave's World
- Royal River Heat Pumps

The first three vendors qualify for the School Retrofit FON. Royal River does not, but we are still soliciting a bid as they qualify as a provider for other incentives.

Attachments: School Retrofit Funding Opportunity Notice

EFFICIENCY MAINE

COMMERCIAL & INDUSTRIAL PRESCRIPTIVE PROGRAM

FUNDING OPPORTUNITY NOTICE (FON)

School Retrofits FON

FON-014-2024

Opening: October 26, 2023

Application Deadline: ~~October 1, 2024~~ **March 31, 2025**

Project Completion Deadline: ~~January 31, 2025~~ **November 30, 2025**



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APPLICATION DOCUMENTS:

- 1) Attachment A: FON HVAC Project Application and Commitment Form**
- 2) Qualified Partner Material Price Quote**

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- Scope of Work Sample**
- Project Acceptance Form Sample**

SECTION 1: OVERVIEW AND INSTRUCTIONS

1.1 Purpose of Application Request

Through this Funding Opportunity Notice (FON or “opportunity”) Efficiency Maine is seeking applications for energy efficiency electrification projects involving whole-building heating, ventilation, and air conditioning (HVAC) projects in Maine schools that currently heat with oil or propane. This initiative falls under Efficiency Maine’s Commercial and Industrial Prescriptive Initiatives (CIPI). The program will refer to this opportunity as the School Retrofits Funding Opportunity Notice (or School Retrofits FON). This initiative offers higher incentives than typically provided under the CIPI, with the intent to accelerate the conversion to whole building high-efficiency air-source heat pump HVAC equipment in Maine schools

1.2 Funding Description

This FON provides enhanced incentives for qualifying projects to upgrade HVAC systems in Maine schools. See the charts below for incentive information on the qualifying equipment and see section 2.6 for a description of the criteria that will be used to determine which equipment (or “measures”) qualifies for these incentives. HVAC measures below are intended to serve the whole building or whole heating zone.

Single-Zone Minisplit Heat Pumps			
Zone	Min. HSPF	Min. HSPF2	FON Incentive
1	12.5	9.5 ductless/8.1 ducted	\$1,800/unit
Heat pump retrofit projects must be sized and configured, informed by the current heating system capacity or a Manual J calculation. The heat pump must be configured as the primary heating system. Buildings that heat with natural gas are not eligible. Incentives are capped at 85% of invoiced project cost.			

Energy Recovery Ventilators (ERV)		
Measure Code	Sensible Heat Recovery	FON Incentive
ERV	≥ 55% to < 65%	\$2.25/CFM
	≥ 65% to < 75%	\$2.50/CFM
	≥ 75% to < 85%	\$2.75/CFM
	≥ 85%	\$3.00/CFM
CFM is Cubic Feet Per Minute. Incentives are capped at 90% of total material costs (without labor).		

**School Retrofits
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Heat Pump Rooftop Units (Ventilation)			
Heating Section of Existing System (MBh)	Required Heat Pump RTU* Heating Capacity (MBh)	Minimum Required Efficiency Criteria (Heating)	Incentive per Unit
60-80	24	8.5 HSPF/7.2 HSPF2/2.0 COP	\$7,000
81-120	36		\$10,000
121-160	48	2.0 COP	\$12,000
161-200	60		\$17,000
201-300	90		\$22,000
301-400	120		\$27,000
401-450	132		\$27,000

Heat Pump Rooftop Units must be sized and configured to serve the whole building, or whole zone. *Heating Capacity at 17°F. RTU must be all electric including supplemental heat. **Incentives are capped at 85% of invoiced project cost.**

Variable Refrigerant Flow (VRF) Systems				
Measure Code	Measure	Cooling Capacity Btu per Hour	Criteria (SEER, IEER or HSPF)	Incentive
VRF	Single-Phase VRF Air-Cooled Heat Pump with or without heat recovery	< 65,000	≥ 10 HSPF or 9 HSPF2	\$12.00/sq.ft.
	VRF Air-Cooled Heat Pump <u>without</u> Heat Recovery	≥ 65,000 and < 135,000	≥ 2.25 COP	\$15.00/sq.ft.
		≥ 135,000 and < 240,000	≥ 2.1 COP	
		≥ 240,000	≥ 2.05 COP	
	VRF Air-Cooled Heat Pump <u>with</u> Heat Recovery	≥ 65,000 and < 135,000	≥ 2.25 COP	\$18.00/sq.ft.
		≥ 135,000 and < 240,000	≥ 2.1 COP	
		≥ 240,000	≥ 2.05 COP	

VRF system must be configured as the primary heating system and will meet the required building heating load. **Incentives are capped at 90% of invoiced project costs.**

1.3 FON Schedule

Efficiency Maine will accept applications for the Schools Retrofits FON from October 26, 2023 (extended on October 1, 2024), through ~~October 1, 2024~~ **March 31, 2025**, or until funding has been exhausted.

The CIP initiative team will review the applications and issue incentive offers in the form of a pre-approval offer email to applicants who meet the criteria within this FON, and as funding allows.

FON Schedule	
FON Issue Date:	October 26, 2023 Extended on October 1, 2024
Rolling Application Period:	October 26, 2023 – October 1, 2024 March 31, 2025
Project Completion Deadline:	January 31, 2025 November 30, 2025

1.4 FON Informational Webinars

Efficiency Maine will conduct three webinar presentations to inform interested parties on the specifics of this FON. It is not mandatory but recommended the applicant attend. The webinar schedule appears below and to participate in a webinar presentation, register using the link attached to your desired date.

- Tuesday, November 5, 2024, at 8:00 AM - [TO REGISTER, CLICK HERE](#)

1.5 Project Development

Efficiency Maine offers a virtual building consultation service if you're not sure what energy efficiency solutions may exist in your building. If you wish to take advantage of this no-cost, no obligation service, [click here](#) and we will contact you to set up a time to discussion solutions best suit for your building.

1.6 Design Guidance for Air-Source Heat Pump (ASHP) Systems

Efficiency Maine requires all new ASHP systems to meet the whole-building heat load requirements. The following guidance is provided to assist in properly designing ASHP systems to ensure building occupants are comfortable through Maine's heating season. HVAC retrofit projects can also replace a whole heating zone.

Step One: Calculate the Manual J heating requirement for each building/zone OR determine the current heating system heating capacity. The whole building must be part of this calculation.

Step Two: Use the output of the Manual J or the current heating system heating capacity to design the new heat pump system:

- Single zone without Manual J: Must be a 1:1 zonal replacement designed at a heating capacity that matches 60% to 100% of the current heating system capacity.
- Single zone with Manual J: Use Manual J output to design a system at a heating capacity for single zones with 80% to 120% of Manual J design load.
- For all configurations, data from the manufacturer's specification sheet will be used when comparing the proposed design load to the existing heating capacity or Manual J output. Manufacturer's specification sheets must show the heating capacity of the proposed system at 5 degrees F or at design temperature.

Step Three: Once you've determined an ASHP design that matches rated capacity to the capacity percent ranges, select ASHP equipment that meets the efficiency criteria as described in Section 2.6.

1.7 Municipal and School Financing

The Municipal Lease from Efficiency Maine Green Bank is designed to help municipalities and schools afford the remaining project cost after an Efficiency Maine rebate. Participants can finance these co-pays through a non-debt finance vehicle known as a "municipal lease." The Efficiency Maine Green Bank

pairs Efficiency Maine program participants with private, Maine-based lenders that provide this type of financing.

A municipal lease is an effective alternative to traditional debt financing (bonds, loans, etc.) because it allows a public organization to pay for energy upgrades by using money that is already set aside in its annual utility budget. Essentially, the lessee uses utility bill savings to pay for the financing costs. For more information on municipal leases, please [click here](#).

SECTION 2: PROJECT ELIGIBILITY

2.1 Eligible Schools

2.1.1 Eligible schools will be limited to PreK-12 public school buildings in Maine that currently heat with **oil or propane fuel**. Retrofit projects in qualifying schools must serve the whole building, or a whole heating zone served by the existing heating system.

Other schools that are not eligible may qualify for incentives offered through Efficiency Maine Prescriptive Initiatives. See <https://www.energymaine.com/at-work/education/> for more information.

2.1.2 Eligible Building Spaces will be limited to:

- Classrooms/Hallways/stairways
- Lobbies/Entryways
- Auditorium
- Library
- Cafeteria/Kitchens
- Restrooms/Locker rooms
- Open and Closed offices
- Gymnasium

2.1.3 Ineligible Buildings & Spaces

- Concession stands/dugouts
- Storage buildings
- Bus garages
- Portable classrooms

2.2 Eligible High-Performance Heat Pump Projects

An eligible heat pump retrofit project is limited to the heat pump solutions listed in section 2.6 for high-efficiency heat pumps. Heat pumps must meet the specified energy efficiency criteria, which an Efficiency Maine Qualified Partner (QP) can determine. Efficiency Maine will confirm eligibility during a review of an application. The heat pumps must be installed and configured as the primary heating system and the existing system may be configured for supplemental heating, if necessary. Projects must be completed by a QP. A Qualified Partner can be found by using the locator at <https://www.energymaine.com/at-work/qualified-partners/>. To use the locator simply enter your ZIP code and desired radius before selecting “Heat Pumps and Cooling Solutions” in the “Services” menu.

2.3 Eligible Variable Refrigerant Flow (VRF) System Projects

An eligible VRF system retrofit project is limited to one of the systems listed in section 2.6. VRF projects must meet the specified energy efficiency criteria, which a QP can determine. Efficiency Maine will confirm eligibility during a review of an application. **The installed VRF system must be installed and configured as the primary heating system for the whole building.** Project incentives for this category will cover a portion of the project cost. Projects must be completed by a QP. A Qualified Partner can be found by using the locator at <https://www.energymaine.com/at-work/qualified-partners/>. To use the locator simply enter your ZIP code and desired radius before selecting “Heat Pumps and Cooling Solutions” in the “Services” menu.


2.4 Eligible Heat Pump Rooftop Units (RTUs)

An eligible RTU system retrofit project is limited to one of the systems listed in section 2.6. Replacing existing rooftop units (RTUs) with heat pump systems can significantly lower energy consumption while providing building ventilation, heating, air conditioning, and dehumidification. Project incentives for this category will cover a portion of the equipment cost. The replacement RTU must be all electric including the RTUs back-up heat. In addition, projects must be completed by a QP. A Qualified Partner can be found by using the locator at <https://www.energymaine.com/at-work/qualified-partners/>. To use the locator simply enter your ZIP code and desired radius before selecting “Heat Pumps and Cooling Solutions” in the “Services” menu.


2.5 Eligible Energy Recovery Ventilator (ERV) Projects


ERVs are often used to condition outside air that ventilates into a building, taking the load off a heating or cooling system and making them more efficient. For this FON, an eligible project is limited to the ERV solution and criteria listed in section 2.6. ERV projects must meet the specified energy efficiency criteria, which a QP can determine. Efficiency Maine will confirm eligibility during a review of an application. In addition, projects must be completed by a QP. A Qualified Partner can be found by using the locator at <https://www.energymaine.com/at-work/qualified-partners/>. To use the locator simply enter your ZIP code and desired radius before selecting “Heat Pumps and Cooling Solutions” in the “Services” menu.


2.6 Eligible Solutions

Single Zone Heat Pumps			
Zone(s)	Minimum HSPF/HSPF2	Description	Example Image
1 Indoor Unit	12.5/9.5 ductless and 8.1 ducted for single-zone	<p>Mini-Split Heat Pump Systems</p> <ul style="list-style-type: none"> • Incentives are capped at 85% of the invoiced project cost. • System must serve as the primary heating and cooling system. • Heat pump retrofits must be sized and configured as a whole building system. 	<p>Mini-split heat pump outdoor unit.</p> 

Heat pump retrofit projects must be configured as the primary heating and cooling system, informed by the current heating system capacity or a Manual J calculation. Buildings that heat with natural gas are not eligible. Incentives are capped at 85% of invoiced project cost.

Energy Recovery Ventilators	
Sensible Heat Recovery	Example Image
≥ 55%	
<p>Sensible heat recovery unit transfers heat from exhaust to new supply coming in (heat needed to raise temperature). Incentives are capped at 90% of total material costs (without labor).</p>	

Heat Pump Rooftop Units (Ventilation)				
Heating Section of Existing System (MBh)	Required Heat Pump RTU* Heating Capacity (MBh)	Minimum HSPF/Heating COP at 17°F	Minimum Required Efficiency Criteria (Cooling)	Example Image
60-80	24	8.5 HSPF/7.2 HSPF2	15 SEER	
81-120	36	8.5 HSPF/7.2 HSPF2	15 SEER	
121-160	48	2.0 COP	12 EER	
161-200	60	2.0 COP	12 EER	
201-300	90	2.0 COP	11 EER	
301-400	120	2.0 COP	11 EER	
401-450	132	2.0 COP	11 EER	
HSPF is Heating Seasonal Performance Factor, COP is the Coefficient of Performance. Incentives are capped at 85% of invoiced project cost.				

Variable Refrigerant Flow Systems						
Measure Code	Measure	Heating Capacity Btu per Hour	Criteria (SEER, IEER or HSPF)	Example Image		
VRF	Single-Phase VRF Air-Cooled Heat Pump with or <u>without</u> Heat Recovery	< 65,000	≥ 10 HSPF or 9 HSPF2			
	VRF Air-Cooled Heat Pump <u>without</u> Heat Recovery	≥ 65,000 and < 135,000	≥ 2.25 COP			
		≥ 135,000 and < 240,000	≥ 2.1 COP			
		≥ 240,000	≥ 2.05 COP			
	VRF Air-Cooled Heat Pump <u>with</u> Heat Recovery	≥ 65,000 and < 135,000	≥ 2.25 COP			
		≥ 135,000 and < 240,000	≥ 2.1 COP			
		≥ 240,000	≥ 2.05 COP			
	VRF system must be used as the primary heating system and provide heat to the whole building. Incentives are capped at 90% of invoiced project cost.					

SECTION 3: APPLICATION REQUIREMENTS

Each applicant must submit the documentation listed below to be considered for incentives under this opportunity. Note that this documentation must include a material price quote obtained by the applicant from a Qualified Partner. Material quotes must include the make and model of each product used in the energy efficiency solution, the quantity of each and represent the costs to the customer. If multiple school buildings within a school district wish to participate in the FON, each building will be considered a separate project and therefore each building would require its own application and be subject to these requirements. The list of required documentation follows:

HVAC Projects:

- Attachment A: FON HVAC Project Application and Commitment Form
- Qualified Partner Material Price Quote to Customer

Additional documents for HVAC project applications:

- Installation design and proposed HVAC system layout
- Building layout or floor plan documentation with square footage
- Selection report (for ERV projects)
- Piping diagram or selection report (for VRF application)

**Efficiency Maine reserves the right to request additional information as needed prior to project approval.*

Applications that are incomplete will not be accepted by Efficiency Maine and will be returned to the applicant via email.

SECTION 4: SUBMITTAL INSTRUCTIONS

Project applications must include all materials (appropriate attachments) as requested in Section 3 and are to be emailed to CIP@efficiencymaine.com by the program applicant. The email subject line must include "CIPI FON-014-2024".

For questions throughout the process, applicants are encouraged to speak with a Qualified Partner (using the locator tool described in Section 2) or to contact the Program Team at (207) 213-6247 or CIP@efficiencymaine.com.

SECTION 5: PROJECT APPROVAL AND INCENTIVE OFFER PROCESS

The process to apply for a project incentive starts with obtaining pre-approval. This must be done prior to ordering, procuring, or installing any equipment or materials. By applying, the applicant is making a representation to Efficiency Maine that all information provided in connection with the application is complete and accurate at the time of submission. The intentional provision of any false or misleading information, or the intentional omission of material information, will result in the application being deemed ineligible. Efficiency Maine recognizes that, depending on the nature of a proposed project, third-party vendor, installer, or energy service companies (ESCOs) may assist in the preparation, submittal, and processing of an application on behalf of a customer. Notwithstanding the participation of a third-party vendor, installer or ESCO, Efficiency Maine considers the customer to be the FONs

Applicant and requires the customer to be a direct party to the application. Efficiency Maine requires direct communication with the customer as necessary for review and evaluation of an application. Because no project approval or incentive award is guaranteed, no third-party vendor, installer or ESCO should make any firm commitment of incentive award funds in advance of a final notice of award to the customer.

For applications received and accepted by the deadline listed in section 1.3, Efficiency Maine will review the data submitted to ensure accuracy. Efficiency Maine reserves the right to conduct pre-inspections at project sites and/or to request additional information during the review process. A representative from Efficiency Maine may schedule site inspection visits through the point of contact listed in the FON HVAC Project Application and Commitment Form (Attachment A), during the pre-approval period.

Once Efficiency Maine completes its review, it will make a formal incentive pre-approval offer through an “Approved Scope of Work” emailed to the applicant and the installer. The Approved Scope of Work and Terms and Conditions will be sent to the applicant and will indicate the approved scope of work and project financials including costs and estimated payback and the approved project incentive pending project completion. Incentives received by the applicant may be taxable by the federal, state, and local government. A W9 will be sent with the Approved Scope of Work to ensure correct tax information of the applicant. If the applicant wishes to accept this incentive offer, the applicant, and the installer (QP) must sign the Approved Scope of Work and Terms and Conditions and return them with the completed W9 for the applicant via email to the contact listed in Section 4.

Efficiency Maine will confirm receipt of an applicant’s acceptance of the pre-approval incentive offer via email to the contacts listed on the HVAC Project Application and Commitment Form (Attachment A) and include the Customer Project Acceptance Form detailing the scope of work. Only at this point may the applicant proceed with material ordering/purchasing and installation in accordance with the Approved Scope of Work.

SECTION 6: PROJECT COMPLETION PROCESS

Upon completion of all work as outlined in the Approved Scope of Work (see section 1.3 for project completion deadline), the applicant and the installing contractor must sign and return the Customer Project Acceptance Form along with any material invoices to the email address listed in Section 4. Efficiency Maine will conduct a final project review and process the applicant’s incentive(s). Once the final project review has been completed, payment will be processed to the customer. Efficiency Maine reserves the right to conduct a post-installation inspection during the final project review. A representative from Efficiency Maine will schedule site inspection visits through the point of contact listed in the FON HVAC Project Application and Commitment Form (Attachment A). Efficiency Maine will conclude all approved incentive payments by ~~December 15, 2024~~ **December 15, 2025**.