Office of Environmental Sustainability
Final Report

Jesus Martinez Garcia
Rebate Finance Intern
Academic Year: 2015-16
05/06/2016

Description: The Rebate Finance Intern is in charge of promoting economic viability within Oberlin College, its staff, and its students. The primary job of the intern will be to help facilitate the Energy Conservation Rebate Program. Tasks of the Intern include being a resource for various stakeholders, updating a master database of collected rebates, and actively searching new possible rebate program to tap into.

Accomplishments:

1. Established strong connections with project managers and branched out to key staff, such as Tom Coyle of Efficiency Smart and Samantha Schneider from Columbia Gas.
2. Facilitated the access and information about rebate for project managers and other parties by making the rebate section of the OES website coherent and aesthetically pleasing.
3. Increased awareness of economic viability within students by participating and aiding in the 2016 Spring Ecolympics: helped raise funds for bike reflectors to promote bike safety behaviors.
4. Assisted in the development of capturing rebates for products purchased from the non-catalog sections of punch out forms.
5. Connected with the Green Edge Fund on the rebate opportunities that their efficiency loans could capitalize on.
6. Researched the different finance principles of other rebate programs at different Universities and Colleges.
7. Sharpened my professional development by being proactive with deadlines, being organized, and communicating with my advisors.

Challenges

This position was a wonderful experience that constantly pushed me to improve myself. One of the biggest challenges that I faced, initially, was comprehending the logistics and function of utility rebates.

Other logistics that took some time to comprehend was the property of retroactivity; efficiency Smart, the electric rebate program, would be willing to look at past projects completed, but Innovative Energy Solutions, the gas rebate program, needed to know about a project before it even started. Another challenging aspect of the internship was how to actually go about trying to
capitalize on rebates; figuring out the step by step process was challenging and came about from trial and error, phone calls, and asking the correct questions.

How to interact with project managers was also difficult. While some faculty were well aware of Oberlin’s Rebate Program and how to utilize rebates in general, other project managers never really considered or knew what rebates were. Trying to deliver information without over explaining or being too broad proved to be a balancing act. The speed of communication was a barrier as well. Getting responses via email was slow and conversations sometimes took weeks to finish due to projects managers being very busy.

While all project managers had some sort of project or worked around projects rebate-eligible, some had more relevant project at a higher frequency; deciphering which project managers to visit more frequent was difficult.

All project managers were very welcoming, however, some project manager were more direct and professional while others were more lenient and informal. Understanding how to navigate through the various personalities and expectations of my project manager was difficult.

Another problem was comprehending the uses of terminology that many of my project manager used. Specs Sheet. Punch Out Forms. Invoice Forms. The internship required a learn-quickly ability.

**Key Stakeholders**

**Office of Environmental Sustainability**
- Bridget Flynn, Sustainability Coordinator
  - Bridget.Flynn@Oberlin.edu
- Meghan Riesterer, Assistant Vice President of Energy Management
  - mriester@oberlin.edu

**Office of Facilities Planning and Construction / Capital Planning**
- Steve Varelmann, College Architect
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- Leo Evans, Assistant Director
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- Nick Bobulsky, Manager of Construction
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**Office of the Controller**
- Heidi Pycraft, Controller
Facilities Operations
  ○ Director of Facilities Operations: Keith Watkins
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  ○ Rick Gerena, Skilled Trades Manager
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  ○ Dave Pastorius, CHP & HVAC Manager
    ■ dpastori@oberlin.edu

Science Center
  ○ Forrest Rose, Facilities Managers
    ■ forrest.rose@oberlin.edu

Columbia Gas
  ○ Samantha Schinder, Gas Rebate Program Representative
    ■ Samantha. Schneider@dnvl.com

Efficiency Smart
  ○ Tom Coyle
    ■ tcoyle@efficiencysmart.org

The Green Edge Fund
  ○ Julia Murphy
    ■ edgefund@oberlin.edu

Deliverables
  ● Finance Principle Document
  ● Green Edge Fund Presentation
  ● Key Notes with Stakeholder
  ● Summer program rebate formalization
  ● Efficiency Smart Application
  ● Columbia Gas Application

Recommendations

This internship could continue being delegated by one person or it can also be merged with the responsibilities of another internship. There is still a lot of ground to cover in informing the college and its faculty about different payback opportunities it can capitalize. There are many different practices that helps reduce costs besides rebates that Oberlin could utilize, this could potentially be a research project. I would recommend that the next intern looked at the way other universities, such a Stanford organizes its rebate program. The next intern should continue to communicate with project manager and be as well informed as possible. Contacting the representatives from the Gas and Electric rebate programs is essential in developing core avenues of communication.
This is guided towards the structure of the entire structure of the OES Internship program. Though dividing the internship positions to individuals is a very good technique, I think that the OES Internship program should embrace more collaborative work. I understand that some people are more inclined to work on the metrics or communication, but the variety of skills the interns have as a whole could be utilize together to complete more projects at bigger scales. Working in a team opens the opportunity to building strong relationships have a support network.

**Suggestions and Insiders Info**

- The office of Capital Planning and Facilities is a key place in finding people that might have rebate-eligible projects.
- The Master Rebate Database is located in the Office of Sustainability's Google Drive. Password can be obtain from Bridget Flynn.
- Oberlin College falls under Energy Smart’s Custom Program not its Business program.
- In order to submit a rebate to Energy Smart, contact the representative at the program, Tom Coyle, with a description of the project along with any energy savings information that a project manager can supply.
- In order to receive a rebate from Columbia Gas an Investment to Savings Ratio excel sheet needs to be submitted. This sheet needs to consist of three key things.
  - Projected Annual Natural Gas Savings, ccf
  - Investment/Cost of Project
  - Measure of life: How to measure the life of this product/project
- For Columbia’s Innovative Solutions we are only looking at the ECM Rebate Application for a cash in rebate.
- Columbia Gas Requires an application before the start of a project and after the project is completed.
- Columbia Gas Requires that a list of “exhibits,” supplementary information, to be submitted along side of the ECM Rebate Application. These exhibits are:
  
  **Exhibit A:**
  - Project description/discussion/ timeline.
  - Describe the purpose of and need of the project.
  - How the project is innovative.
  - A timeline for project.
  - Describe the energy conservation measures that will be installed.
  
  **Exhibit B:**
  - Sources of funds commitment letters.
  
  **Exhibit C:** Provide documentation demonstrating organization/corporate
  - Provide documentation demonstrating organization/corporate authorization of the customer’s proposed project.
  
  **Exhibit D:**
  - Provide a copy of Customer’s W-9 form.
Exhibit E:
  ● Provide a copy of recent Columbia Gas of Ohio bill.

Exhibit F:
  ● Savings Calculations, assumptions, and methodology for the energy conservation measures. (How do you know the product will save as much as you claim)

Exhibit G:
  ● Include complete Savings to Investment ratio spreadsheet as used to calculate the rebate amount.

Unanswered Questions

A process to maintain the funds from the rebates collected needs to be set in place. It is important to note that both IES and Energy Smart requires that the money they pay back needs to be re-invested in other energy efficient projects. How to process and distribute this money needs to be explore.

Conclusion

The Rebate Finance Internship opened me to understanding the various work offices and facilities provide for the college. It was a great journey interacting with different faculty on the ways that they could capitalize on their energy efficient their projects. It was a pleasure to help push forward the effort into implementing sustainable practices within the college, its staff, and students.

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**Next Moves**

I am happy say that this summer I will be attending Middlebury School of the Environment to study system thinking and renewable energy innovations.

I would be willing to be in communication with the OES office and with any future intern on my work.