New York State Energy Research and Development Authority

Green Jobs – Green New York Q1 2019 Quarterly Update

Quarter ending March 31, 2019

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Program Description

Green Jobs – Green New York (GJGNY) provides funding for energy assessments, low-cost financing for energy upgrades, and technical and financial support to develop a clean energy workforce. GJGNY is a statewide effort to strengthen communities through energy efficiency and uses constituency-based organizations to support program outreach in underserved communities. GJGNY enables New Yorkers to make a significant difference in homes, businesses and neighborhoods—making them more comfortable, more sustainable, and more economically sound. GJGNY is administered by NYSERDA and made available by the <u>Green Jobs – Green New York Act of 2009</u>.

1 Workforce Development

GJGNY supports a broad range of education and training programs aimed at creating an experienced green collar workforce. This workforce will have the relevant skills and credentials needed to support New York State's growing clean energy economy. The workforce training programs help meet the demand for energy efficiency and renewable energy measures and technologies. Through public-private partnerships, workforce development programs fund the development and delivery of cutting-edge training programs and provide financial support to those who wish to pursue new career training, professional certifications, and critical on-the-job training.

1.1 Clean Energy Technical Training

From the program's inception through December 31, 2017, over 3,900 New Yorkers were trained in a range of energy efficiency and renewable energy courses.

While most GJGNY-funded training partnership agreements ended by December 2016, NYSERDA has one active GJGNY-funded training partnership agreement with Green City Force (GCF), a Brooklynbased provider of training and job placement support to disadvantaged young adults.

Through March 2019, a total of 121 students have participated in Green City Force's training program. The first cohort of 35 students graduated in June 2017 and two cohorts completed in February (cohort 18) and June (cohort 19) 2018. The most recent cohort of 17 members finished in mid-February 2019 and there are 32 members still in service with an end date in April.

Employment outcomes from the five groups are as follows:

- Cohort 13 (June 2017): Thirty two of 35 have been employed in the clean energy sector.
- Cohort 15 (February 2018): All 18 members completed internships through GCF in the EmPower NY program.
- Cohort 16 (June 2018): The 19 members completed AmeriCorps service in late June and transitioned to training for both OSHA 10 and Urban Green Council's Green Professional: GPRO Operations & Maintenance Essentials (O&M). All 19 individuals completed these sessions in anticipation of internships with Green City Force's Social Enterprise team, working on NYCHA's Energy Performance Contract projects.
- Cohort 17 (April 2019): The 32 participants are completing their OSHA 10 and GPRO training this week. Twelve members of this team participated in hands-on electrical and green carpentry training through Solar One.

• Cohort 18 (February 2019): Of the 17 members who sat for OSHA 10 and GPRO, 11 successfully earned their GPRO Certificate. Ninety four percent of these participants have secured employment as of March 7, 2019, with seven of those positions within the energy industry.

As part of their industry related training, current and former participants of these cohorts engaged in an electrical training through Solar One, which provided participants introductory knowledge of electrical theory, and hands-on experience wiring series and parallel circuits, three-way switches, lighting fixtures, and circuit breaker boxes; along with an overview of energy conservation methods and energy efficient lighting. As a result of earlier site visits to Con Edison's Learning Center, two graduates successfully moved through the screening and hiring process to begin working as Customer Service Representatives for Con Edison.

Additionally, NYSERDA recently issued the On-the-Job Training for Energy Efficiency and Clean Technology Program Opportunity Notice which includes approximately \$520,000 in GJGNY workforce training funds that will be made available to eligible New York State employers outside of the SBC service territory. This program supports wages for new hires on a first-come, first-served basis for eligible clean energy businesses. The program includes higher wage subsidies for employers that hire workers with additional barriers to employment.

2 Outreach

2.1 Community Energy Engagement Program

The Community Energy Engagement Program (CEEP) incorporates and builds upon the success of previous engagement efforts including the Green Jobs, Green New York (GJGNY) Outreach Initiative. Historically, outreach and engagement were conducted as part of the CBO program funded by GJGNY. While the initial GJGNY funding allocated for outreach activities has been exhausted, NYSERDA continues locally-based outreach and engagement efforts through the CEEP program with funding provided via the Clean Energy Fund (CEF) and Regional Greenhouse Gas Initiative.

Through CEEP, NYSERDA awarded approximately \$5.5 million to deploy Community Energy Advisors to conduct engagement activities to New York State residents, small businesses, and multifamily building owners, with an emphasis on low-to-moderate income (LMI) households and communities. These Community Energy Advisors focus on improving energy affordability and increasing deployment of distributed energy resources for community members of all income levels.

Additionally, the program seeks to address energy affordability needs, reduce energy bills, and increase participation in energy efficiency and renewable energy solutions and programs for residential, multifamily and small business customers. The program also seeks to ensure residential, multifamily and small business customers' awareness of and access to financing options for energy efficiency and renewable energy projects while educating households and communities to achieve greater energy literacy, understand the value proposition of clean energy solutions, enable informed energy decisions, facilitate action in completing clean energy projects, and decrease energy consumption.

Key activities this quarter included:

- General outreach and engagement at a variety of public events where Community Energy Advisors exhibited and encouraged residential and small business customers to be better informed about available resources such as financing options for energy efficiency and renewable energy projects.
- Targeted program outreach this quarter continued to focus on promoting the Solar for All Program and the Energy Study Aggregation Program.
- Following the announcement of the <u>Clean Energy Action Plan</u> in March 2019, the Community Energy Advisors, particularly in the Mid-Hudson and Southern Tier regions began ramping up outreach in support of active <u>Clean Heating & Cooling Community Campaigns</u> in Westchester County and Tompkins County, respectively. Both Westchester County and Lansing, NY (Tompkins County) are impacted by a gas moratorium.

- Programs such as Home Performance with ENERGY STAR[®], Assisted Home Performance with ENERGY STAR[®] and EmPower New York continue to be a focus of customer engagement and outreach activities for residential customers.
- Community Energy Advisors continue establishing relationships with partners within their regions with groups including, but not limited to, weatherization assistance providers, utilities, local social service agencies, chambers of commerce, etc. to identify opportunities to leverage partners' networks and to drive further adoption of energy efficiency and renewable energy projects.
- One example of the partner engagement occurring is a partnership established by CEEP Southern Tier with the Broome County Lead Abatement Program and NYSERDA which seeks to provide a streamlined pathway for property owners and tenants in the Broome County Lead Abatement Program to take advantage of no-cost energy efficiency upgrades though the EmPower NY program and/or Weatherization Assistance Program (WAP). Qualifying properties will receive a free energy audit and may be eligible for free or discounted weatherization/energy efficiency upgrades, including insulation and replacement of major appliances. Additionally, eligible customers will also be able to qualify for a Solar for All subscription.

3 One- to Four-Family Residential Buildings Program

GJGNY provides home assessments and financing to support energy efficiency and renewable energy improvements to one-to-four family homes.

NYSERDA's Home Performance with ENERGY STAR[®] (HPwES) program offers homeowners in New York State a comprehensive approach to improving energy efficiency and home comfort while saving money. Participating Building Performance Institute (BPI) Gold Star contractors conduct energy assessments and upgrades. Income-qualified homeowners are eligible for additional incentives to make energy improvements.

The GJGNY loan also supports deployment of solar photovoltaic (PV) through the NY-Sun program, solar thermal (hot water) systems, and certain wood and pellet stove replacements through Renewable Heat NY.

3.1 Home Performance with ENERGY STAR® Assessments

In the first quarter of 2019, 4,814 free/reduced-cost comprehensive home energy assessment applications were received. The program to date conversion rate from assessment to energy retrofit remains strong at 31%. The conversion rate for the period between March 2018 and March 2019 was 45%. The average cycle time between assessment completion to project completion for the period between March 2018 and March 2018 and March 2018 and March 2019 was 72 days.

Timefram	•	CIGNV Totals since 11/15/10 a	
Timeran	GJGNY Totals since 11/15/10 a		
Q1 2019	Received Audit Applicatio	4,814	
Program to E		181,115	
Average # of Applications Received		1,858	
	Approved Audit Applicatio	ns	
	Free		
Q1 2019		4,689	
Program to D	Date	161,120	
	Reduced Cost		
Q1 2019	397		
Program to D	Date	13,241	
Total Approved Audit Applications	5	174,361	
Average # of Applications Approve		1,789	
	Scheduled Audits		
Scheduled Audits as of End of Curr	rent Month	1,223	
	Completed Audits ^b		
		Free	
	Q1 2019	2,922	
Carly (77 500 Audita)	Program to Date	122,391	
Goal: (77,500-Audits)		Reduced Cost	
	Q1 2019	225	
	Program to Date	9,510	
Total Completed Audits		131,901	
Audit Funds Invoiced to Date		\$33,412,460	

Table 3-1. Home Performance with ENERGY STAR Assessments.

^a GJGNY totals since 11/15/10 are inclusive of CBO initiated activities.

^b Reported data includes all audits offered through the Residential Free/Reduced-Cost Energy Audit Program. In mid-2016, NYSERDA began using CEF funds for audits in CEF electric utility territories.

3.2 One- to Four-Family Residential Buildings Financing

New York residents can apply for a loan to finance energy efficiency work, including, but not limited to, upgrading insulation, air sealing, and replacing outdated appliances with ENERGY STAR[®] certified products that may render savings on their monthly utility bill. Green Jobs-Green New York (GJGNY) financing has also expanded to net-metered technologies, such as solar electric systems and solar thermal systems, that have attracted many customers statewide.

GJGNY provides two loan options for consumers: On-Bill Recovery (OBR) loans, which enable customers to make payments through their utility bills; and Smart Energy loans, unsecured loans that are paid back directly to NYSERDA's loan servicing contractor. Both loans offer expanded credit qualification criteria (Tier 2) enabling some applicants who would not qualify for a loan based on more traditional criteria (Tier 1) to qualify for GJGNY loans.

HNY = renewable heat (pellet or wood stove	es). GSHP = ground	source heat pump.	ST = solar thermal.
GJGNY Loan Type	Applications Received (Number) ¹	Loans Issued (Number)	Loans Issued (Dollars)
EE Smart Energy Loan		12,742	\$113,121,909
EE On-Bill Recovery Loan		4,028	\$45,183,890
Total	36,618	16,770	\$158,305,798
PV Smart Energy Loan		3,626	\$59,440,924
PV On-Bill Recovery Loan		4,130	\$69,619,647
Total	12,444	7,756	\$129,060,571
EE & PV Smart Energy Loan		26	\$473,301
EE & PV On-Bill Recovery Loan		10	\$218,011
Total	394	36	\$691,313
RHNY Smart Energy Loan ²		45	\$408,264
RHNY On-Bill Recovery Loan		3	\$17,209
Total	169	48	\$425,473
GSHP Smart Energy Loan		5	\$112,710
GSHP On-Bill Recovery Loan		6	\$114,685
Total	33	11	\$227,395
ST Smart Energy Loan		9	\$64,039
ST On-Bill Recovery Loan		2	\$11,510
Total	19	11	\$75,549
Grand Total	49,677	24,632	\$288,786,100

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EE- anaray officiancy only	DV = DV only	E = X D V = 2 loar	ncorporating	hoth anaray	atticiancy and DV

Table 3-2. Green Jobs–Green New York Financing, Summary by Loan Purpose and Loan Type.

EE= energy efficiency only. PV = PV only. EE & PV = a loan incorporating both energy efficiency and PV.

2 Includes an EE & RHNY loan.

Table 3-3. Green Jobs–Green New York Financing, Summary by Loan Type and Underwriting

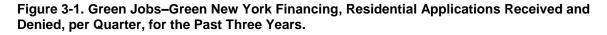
Loan Type Summary								
	Smart Energy On-Bill Recovery						Total	
	Tier 1	Tier 2	Total	Tier 1	Tier 2	Total		
Loans Issued	13,141	3,312	16,453	6,899	1,280	8,179	24,632	
Value (Dollars)	\$140,986,282	\$32,634,866	173,621,148	\$97,623,722	\$17,541,230	115,164,952	\$288,786,100	
Average Loan	\$10,729	\$9,854	\$10,553	\$14,150	\$13,704	\$14,081		
Average Term (Years)	13.6	14.2	13.7	14.6	14.7	14.6		

Table 3-4. Green Jobs–Green New York Financing, Energy Efficiency Loans, by Market Indicator and Underwriting

Energy Efficiency Loans (Assisted vs. Market Rate)								
		Assisted			Grand Total			
	Tier 1	Tier 2	Total	Tier 1	Tier 2	Total		
Loans Issued	4,450	2,151	6,601	8,946	1,223	10,169	16,770	
Value (Dollars)	\$30,705,289	\$15,439,141	\$46,144,430	\$98,154,011	\$14,007,357	\$112,161,369	\$158,305,798	
Tier % (Loan Count)	67%	33%	100%	88%	12%	100%		
% of Total Loans issued			39%			61%	100%	
% of Total Funds Issued			29%			71%	100%	
Average Loan Amount		\$6,991			\$11,030		\$9,440	

Table 3-5. Green Jobs–Green New York Financing, Photovoltaic Loan Summery, by Market Indicator and Underwriting

Photovoltaic Loan Summary (Affordable Solar vs. Market Rate)										
	Af	fordable So	lar	Market Rate			Grad Total			
	Tier 1	Tier 2	Total	Tier 1	Tier 2	Total				
Loans Issued	158	51	209	6,437	1,142	7,579	7,788			
Value (Dollars)	\$2,165,910	\$756,315	\$2,922,225	\$107,006,067	\$19,743,374	\$126,749,441	\$129,671,666			
Tier % (Loan Count)	76%	24%	100%	85%	15%	100%				
% of Total Loans Issued			3%			97%	100%			
% of Total Loans Issued			2%			98%	100%			
Average Loan Amount		\$13,982			\$16,724		\$16,650			



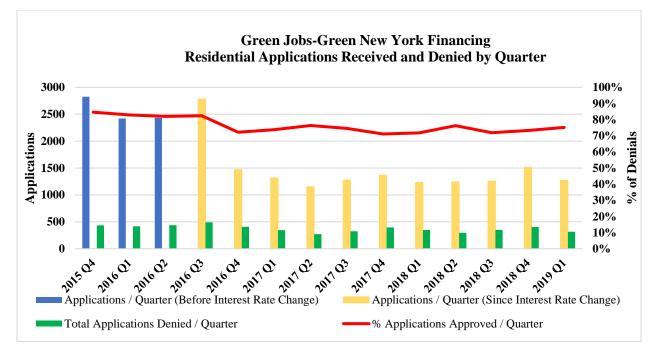


Figure 3-2. Green Jobs–Green New York Financing, Smart Energy and On-Bill Recovery Loans Issued per Quarter.

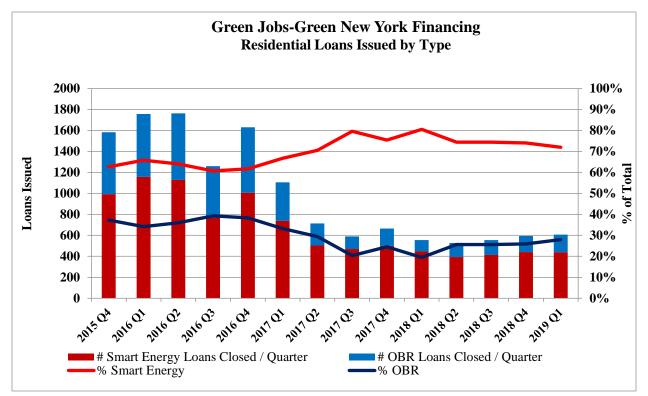




Figure 3-3. Green Jobs–Green New York Financing, Loans Issued by Tier, per Quarter

Table 3-6. Green Jobs–Green New York Financing, Residential Energy Efficiency Loans Issued for Applications Received on or after 9/01/16.

Green Jobs-Green New York Financing (Energy Efficiency Only)								
Residential Loans Issued for Applications Received on or after 9/01/16								
Income Category	<u># Loans</u>	<u>% of Loans</u>						
<80% AMI *	2,399	66%						
80-120% AMI*	435	12%						
>120% AMI* (Tier 1)	659	18%						
>120% AMI* (Tier 2)	124	3%						
Total Loans Issued	3,617	100%						

* AMI = Area Median Income, which is the greater of the State or County Median Income. Households with incomes greater than 120% AMI are further grouped by underwriting Tier, with different interest rates applying to each group.

 Table 3-7. Green Jobs–Green New York Financing, Residential Renewables and Combined

 Technologies Loans Issued for Applications Received on or after 9/01/16.

Green Jobs-Green New York Financing (Renewables & Combined Technologies Only) Residential Loans Issued for Applications Received on or after 9/01/16									
Income Category	<u># Loans</u>	<u>% of Loans</u>							
<80% AMI*	277	23%							
80-120% AMI*	296	24%							
>120% AMI* (Tier 1)	554	45%							
>120% AMI* (Tier 2)	99	8%							
Total Loans Issued	1226	100%							

* AMI = Area Median Income, which is the greater of the State or County Median Income. Households with incomes greater than 120% AMI are further grouped by underwriting Tier, with different interest rates applying to each group.

4 Multifamily Energy Performance Portfolio

NYSERDA offers a portfolio of programs and incentives for owners, facility managers, developers, and condo/co-op boards of multifamily buildings with five or more units in New York State. NYSERDA's programs make it easier to assess, fund, implement, and measure energy efficiency upgrades that improve building performance and save money. Given limited activity in this sector, NYSERDA staff are exploring opportunities for increasing adoption of clean energy improvements.

4.1 Multifamily Energy Performance Assessments

Through March 2019, from the 316 approved assessment applications, 316 (100 percent) assessments have been completed.

Metric	Q1 2019			Cumulative				
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total	Budget/ Goal	
Received Assessment Applications	0	0	0	193	140	333		
Approved Assessment Applications	0	0	0	193	140	333	500	
Assessment Funds Encumbered (\$)	0	0	0	2,342,960	1,120,987	3,463,947		
Assessment Funds Invoiced (\$)	0	0	0	2,221,324	\$1,006,639	3,227,964	3,000,00	
Completed Assessments	0	0	0	186	130	316	400	
Number of Projects Withdrawing from MPP after Assessment*	0	0	0	17	29	46		

Table 3-1. Multifamily Energy Performance Assessments.

*MPP Projects must achieve a minimum of 20 percent in energy savings. Projects may choose to proceed outside MPP. Some may choose smaller work scopes which will not achieve program standard and thus not be eligible for MPP and some may elect to access utility incentives. If energy efficiency projects are completed, building owners that have an authorized assessment would still be eligible to apply for GJGNY financing.

4.2 Multifamily Energy Performance Projects

Through March 2019, the Multifamily Energy Performance Program has completed 61,795 housing units with installed measures. Of those units with installed measures, 30,853 (50 percent) are associated with affordable housing.

Metric		Q1 2019		Cumulative			
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total	
Projects in Pipeline*	0	0	0	186	130	316	
Projects Contracted to have Measures Installed	0	0	0	186	130	316	
Households Associated with Projects Contracted	0	0	0	30,853	30,942	61,795	
Projects with Installed Measures (units)	0	0	0	30,853	30,942	61,795	
kWh Savings of Installed Measures	0	0	0	36,240,711	16,967,556	53,208,267	
MMBtu Savings of Installed Measures	0	0	0	475,792	364,525	840,317	
Dollar Savings of Installed Measures	0	0	0	\$115,597,850	\$45,182,257	\$160,780,106	

Table 4-2. Multifamily Energy Performance Projects.

*Projects that receive GJGNY-supported assessments and/or financing may also receive incentives through the System Benefits Charge (SBC), Energy Efficiency Portfolio Standard (EEPS), Regional Green House Gas Initiative (RGGI), and/or utility programs, such that the projects' energy savings may not all be attributable solely to GJGNY.

4.3 Multifamily Energy Performance Financing

Through March 2019, the Multifamily Performance Program has closed 22 loans with a total value of \$12,099,798. NYSERDA's share of that total loan value is \$3,834,685.

Table 4-3. Multifamily Energy Performance Financing.

Loan Status	Q12019			Cumulative			
	NYSERDA Share of Total Loan Number Value		Total Loan Value	Number	NYSERDA Share of Total Loan Value	Total Loan Value	
Participation Agreements Approved	0	\$0	\$0	22	\$3,834,685	\$12,099,798	
Loans Closed	0	\$0	\$0	22	\$3,834,685	\$12,099,798	

5 Small Commercial Energy Efficiency Program

NYSERDA's Small Commercial Energy Efficiency Program offers financial assistance to help small businesses and not-for-profit organizations improve their energy efficiency and reduce their energy costs. This program offers two low-interest loan options to finance energy efficiency projects. On-Bill Recovery Financing offers eligible small businesses and not-for-profit customers up to \$50,000 at 2.5% for a maximum 10 years. Borrowers use the savings on their energy bills to pay for their energy efficiency upgrades by repaying the loan through a monthly assessment on the organization's electric utility bill. For the second loan option, a Participation Loan, NYSERDA partners with lenders across New York State to help small businesses and not-for-profit organizations access below-market financing. NYSERDA provides 50% of the loan principal, up to \$50,000, at a 2% rate of interest for not more than 10 years. The lender provides the remaining principal of the loan at market rate. In addition, eligible small business and not-for-profit customers participating in NYSERDA's NY-Sun Solar PV Incentive Program can access low-interest GJGNY financing to install solar PV systems of up to 200 kW. Financing is also available for the purchase of solar thermal systems, pellet stoves, and advanced cord wood boilers as approved under NYSERDA's Renewable Heat NY Program. Given limited activity in this sector, NYSERDA staff are exploring opportunities for increasing adoption of clean energy improvements.

5.1 Small Commercial Energy Efficiency Assessments

Through December 2018, the Small Commercial Energy Efficiency Program completed 4,216 assessments. The assessment program closed in December 2016. In March 2019, NYSERDA began offering subsidized energy studies (assessments) for GJGNY-eligible small businesses and not-for-profit organizations. Eligible¹ small businesses and not-for-profit organizations may choose to receive an energy audit on a cost-shared basis via NYSERDA's FlexTech program² or Energy Study Aggregation Program with a participating FlexTech Consultant.³

¹ Small businesses and not-for-profit corporations must pay a System Benefits Charge through their electric utility to be eligible for these NYSERDA programs.

² Visit <u>nyserda.ny.gov/All-Programs/Programs/FlexTech-Program</u> for information about NYSERA's FlexTech Program.

³ Visit <u>nyserda.ny.gov/All-Programs/Programs/Energy-Study-Aggregation-Program</u> for information about NYSERDA's Energy Study Aggregation Program.

Table 5-1. Small Commercial Energy Efficiency Assessments.

Metric	Q1	Program Cumulative			
	GJGNY	Monthly Total	GJGNY	ARRA*	Program Total
Received Assessment Applications	0	0	3,574	934	4,508
Completed Assessments	0	0	3,367	849	4,216

5.2 Small Commercial Energy Efficiency Projects

Through March 2019, the Small Commercial Energy Efficiency Program estimates 1,855 project completions as a result of GJGNY funded assessments.

Table 5-2. Small Commercial Energy Efficiency Projects.

Metric	Q1 2019	GJGNY Program Cumulative				
Estimated Projects Completed*	0	1855				
*The 2015 Small Commercial Energy Efficiency Program Impact Evaluation found that 44 percent of the energy savings recommended through program audits were reported to be implemented. Estimated projects completed are inclusive of those that used ARRA funds referenced in Table 5-1 above.						

5.3 Small Commercial Energy Efficiency Financing

Through March 2019, the Small Commercial Energy Efficiency Program has closed 75 loans with a total value of \$3,655,822. NYSERDA's share of that total loan value is \$2,446,370.

Loan Status	Q1 2019			Program Cumulative			
	Number	NYSERDA Share of Total Loan Value	Total Loan Value**	Number	NYSERDA Share of Total Loan Value	Total Loan Value**	
		Applications Ap	proved*				
Participation Loans	0	\$0	\$0	150	\$3,070,091	\$6,439,073	
On-Bill Recovery	0	\$0	\$0	91	\$2,851,504	\$3,551,619	
		Loans Clos	ed				
Participation Loans	0	\$0	\$0	31	\$999,892	\$2,106,204	
On-Bill Recovery	0	\$0	\$0	44	\$1,446,478	\$1,549,618	
Total	0	\$0	\$0	75	\$2,446,370	\$3,655,822	
The Small Commercial Energy Efficiency Financing Program has 13 participating lenders.							
* Customer applications are assessed for both Participation Loan and On-Bill Recovery Loan eligibility prior to approval. Approved							

application values are inclusive of loans that have moved forward to closure.

**The total loan value represents the total value of the loan issued by the lender to the borrower. The total loan value may include financing for non-energy efficiency projects. NYSERDA's share of the total loan value represents 50% of the total energy project cost or \$50,000, whichever is less.

6 Evaluation

The overarching goals of Evaluation are to provide objective and credible information that supports optimum program operation and outcomes, as well as program accountability. Three major types of evaluation are implemented for the GJGNY program. Process evaluation provides information to support program operations by addressing program efficiency and effectiveness, satisfaction and barriers to participation, among other issues. Impact evaluation provides information to help understand actual program impact and improve energy impact estimates, including economic, environmental, and non-energy benefits; in doing so it supports program accountability. Market evaluation also provides information to support program operations and accountability by characterizing and assessing target markets for programs.

Evaluation Activities

NYSERDA is planning to conduct an evaluation of GJGNY-funded audit-only projects for studies completed between 2014 and 2017 to estimate these savings. This evaluation is anticipated to begin in mid-2019. In addition, a billing analysis of Home Performance with Energy Star on-bill recovery projects is underway. As appropriate, results will be summarized in future reports to the Advisory Council. GJGNY evaluation reports can be found on NYSERDA's website.