

**Green Jobs – Green New York (GJGNY) Advisory Council Meeting**  
**September 14, 2011**  
**Meeting Notes**

**Attendees –**

**Albany Office:**

Jen McCormick, Empire State Development; Kevin Rooney, Oil Heat Institute of Long Island, Dave Hepinstall, Association for Energy Affordability; Saul Rigberg, Department of State; Jared Snyder, NYSDEC; Jackson Morris, Pace; Mario Musolino, DOL; Zywia Wojnar, Pace; Charlene Palchozak, DPS; Alicia Frazee, Strategic Communications; Frank Murray, Karen Hamilton, Adele Ferranti, Renée McAllister, Peggie Neville, Susan Moyer, Hal Brodie, Jeff Pitkin, Rebecca Sterling, John Ahearn, Kathryn Fantauzzi, Bryan Henderson, Victoria Engel-Fowles, Carley Murray, Jen Meissner, Todd French, Joseph DeRosa, Helen Kim, Heather Saunders, Dave Munro, NYSERDA

**Buffalo Office:**

No attendees

**NYC Office:**

Hugo Salinas, NY Energy Conservation; Alexis Green, Community Environmental Center; Wendy Fleisher, Pratt Center; Jay-E Emmingham, Pratt Center, Lindsay Robbins, NYSERDA

**Phone:**

Judy Butler, Butler Builders; Jennifer Keida, Standard Insulating Co.; Philip Henderson, NRDC; Maribel Cruz, NYPA; Les Bluestone, Blue Sea Development Company; Hannah Blitzer, Low Income Investment Fund; Andrew Matonak, HVCC; Bill Johnson, Green America Public Private Partnership; Sue Andrews, NYSERDA;

**(The following meeting notes capture comments, questions and discussions held at the meeting in response to the presentations given by NYSERDA staff. A copy of the presentation and any handouts provided can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).)**

Members of the Green Jobs-Green New York (GJGNY) Advisory Council met via video-conference at NYSERDA's Albany, New York City, and Buffalo offices on 9/14/11. Telephone access was made available to members who could not make it to a video conference site. Also present at the meeting were several NYSERDA staff members and additional staff members from Advisory Council member organizations. The Meeting was videotaped and posted at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

**I. WELCOME AND INTRODUCTIONS, Frank Murray, NYSERDA President and CEO**

Frank opened the meeting stating this was the fourteenth meeting of the GJNGY Advisory Council. He mentioned an upcoming announcement from the Governor's Office to assist victims of Hurricane Irene and Tropical Storm Lee, with the replacement of many appliances and heating equipment lost because of the storms.

## **II. BUDGET ADJUSTMENTS, Karen Hamilton, Program Director**

Karen did a quick review of recent budget adjustments that had been provided to Advisory Council members via email prior to the meeting. As a result of the recent Outreach solicitations, it was determined that a minor budget adjustment was needed. The funding for Outreach was increased by \$190,000, with \$150,000 coming from Workforce Development and \$40,000 from One- to Four-Family Homes.

## **III. GJGNY LOGIC MODEL, Jen Meissner, Program Manager**

A copy of the power point slides and a video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Jen discussed the recent draft of the Logic Model report and diagram. It is almost complete and will be posted to the website soon. The Evaluation team worked with program staff and a third party contractor to produce the information.

The goal of the logic model is to show how certain activities lead to different outcomes. It will help to assess program performance in relation to set milestones. The logic model is not static and will change as program needs arise.

**QUESTION:** Does the logic model stop?

**RESPONSE:** We are early on in the program and timeline. We will work on identifying outcomes and indicators to see if goals are being met. Some of this information is easier to track than others, like participation status, whereas consumer awareness takes more time to quantify.

**QUESTION:** How are we defining Green Jobs for the QA/QC projects going forward, to get an accurate picture?

**RESPONSE:** There have been several internal discussions on this topic, including how to define a green job. NYSERDA is working closely with the Department of Labor to leverage and learn from their study efforts and help define an approach for NYSERDA programs. The DOL study was referenced and can be viewed in the [2011 GJGNY Annual Report](#), page 73.

## **IV. ANNUAL REPORT, Peggine Neville, Program Manager**

The Advisory Council was sent a draft copy of the Annual Report on August 29<sup>th</sup>. Comments were requested by 9/8/11. No comments were received. NYSERDA is in the process of finalizing the document to be submitted to the Governor and Legislature on 10/3/11, and posted to the web by 10/1/11.

## **V. PROGRAM STATUS UPDATES**

### **a. Workforce Development, Adele Ferranti, Program Manager**

A copy of the power point slides and a video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Adele reviewed the following solicitations – PON 2011 – Solar Thermal Training, goals are being met under SBC; PON 1816 – Workforce Development Training Partnerships for Energy Efficiency, GJGNY and EEPS funds were combined and have been exhausted. NYSERDA is working with DHCR on getting more pressure houses up (simulation houses for training) and running. There is still a gap on Long Island and NYSERDA would like to see demand met in that region; PON 1817 – Energy Efficiency Career Pathways Training and Technical Training, a small commercial training contract is underway; RFP 2014 – Contractor Exchange Workshops, Three Contractor workshops were held in Albany and Rochester. DOL has been helping to focus on Multifamily. PON 2032 – Technical Workshops/Expand BPI Field Exam Capacity/Certification Standards, technical review and certification standards will be released this fall. A technical review has already happened. This will be the last big PON issued under GJGNY; RFP 2034 – GJGNY Curriculum Inventory, Assessment, and Curriculum Updates, NYSERDA is working with DOL and Pace to find gaps in current training through a contractor survey; PON 2033 – Internships/Apprenticeships/On-the-Job Training, received a great response from the people at the contractor exchange workshop. The program recently celebrated its first graduating class.

**QUESTION:** Who has the responsibility of getting the recent graduates a job?

**RESPONSE:** CBOs are working closely with DOL to help people find jobs.

**QUESTION:** Are the job placements being tracked?

**RESPONSE:** Yes they are being tracked by DOL and Evaluation staff.

**QUESTION:** Are these people additional hires?

**RESPONSE:** It is tough to tell because many businesses are not quickly ramping up. It seems like the funding incentives are helping to hire people, but they are trying to tell if a person would have been hired anyway.

**QUESTION:** Do these workers remain employed?

**RESPONSE:** DOL says they can use their wage reporting system to track workers and whether or not they stay in the field.

**QUESTION:** The goal is to train 6,000 people. How is the progress?

**RESPONSE:** NYSERDA will meet and exceed those goals.

**b. Outreach and Marketing, Sue Andrews, Senior Project Manager**

A copy of the power point slides and a video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Outreach – 14 CBOs were selected in May and full contracting mode is underway. A second RFP was released in June to cover program elements and certain geographic areas. There was a TEP in August and a recommendation for NYSERDA’s Senior Management is currently being drafted.

CSG is the Training and Implementation contractor working with Pratt Institute as a subcontractor. They are working with the CBOs to plan a two day training session tentatively scheduled for November.

A SharePoint site is being developed as a way to streamline communication between the CBOs and NYSERDA.

Marketing – Market research is complete. Residential and Small Business contractor recruitment pieces are being developed in an effort to get non-participants to change business models. Contractor Exchange Workshop materials are being developed.

**c. Financing, Jeff Pitkin, Treasurer and Internal Control Officer**

A copy of the power point slides and a video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Jeff spoke about the status of the unsecured loan portfolio, revisions to loan underwriting standards, on-bill recovery financing, HUD PowerSaver loans, DOE Better Buildings grants and bonding approaches.

So far, all loans are current. Because this is a new program, it might not stay that way. There are 60-70 loans being issued every month. There have been 1,500 retrofits. One out of three retrofits are being done with a loan. 40% of applicants were denied financing. The main reason is the debt to income ratio. Some of the criteria have been changed because of this and NYSERDA expects denials to decrease.

The program is now analyzing consumers that would qualify for Assisted Home Performance with ENERGY STAR® incentives and how to finance the remainder of the cost.

Contractors have given feedback on the financing process and the approval process is being reviewed to make sure people are getting a quick turnaround.

LIPA/Keyspan – To help mitigate consumer confusion and assist consumers in navigating all of the program offerings, NYSERDA is working with LIPA/Keyspan to develop a process where the consumer can sign over the incentive to get the contractor paid up front. NYSERDA would cover those funds and LIPA would reimburse.

Power NY legislation will be an easier tool to access energy efficiency work. NYSERDA, DPS, and the utilities are determining how the program will work.

**QUESTION:** The numbers were run for service territory cap in participation. Thirty thousand customers statewide is the total customer base. Will NYSERDA petition the commission?

**RESPONSE:** NYSERDA will monitor the number of on-bill loan applications in relation to the .5% cap. NYSERDA expects to submit a petition to the commission raise the cap if there have not been dramatic increases in arrearages or terminations.

HUD PowerSaver loans have not yet rolled out. Energy Finance Solutions (EFS) is authorized to originate on-bill loans on NYSERDA's behalf and does not require New York State licensing.

The Better Buildings grant was discussed in detail. The components are in the presentation located on [www.nyserdera.ny.gov](http://www.nyserdera.ny.gov).

Bond proceeds will be used to support additional loans. Introductory meetings are being set up to present the program and to better understand requirements. An RFP will be issued for a bond underwriting firm at the end of this year/early 2012. NYSERDA is working with local governments to see if they will use their authority or give the money back. That could help support lower rate loans. So far only two have reverted their allocations.

**QUESTION:** Why is Tier 2 penetration rate so low?

**RESPONSE:** Consumers don't want to submit their utility statements. It's not necessary for Tier 1. That was a big turn off when consumers were denied from Tier 1. The message is being softened to get people to feel better about submitting their utility information. It can't be done automatically for privacy issues. We are looking at people who have paid their mortgages on time for a year and their utilities for two months. That combination is setting the low penetration rate for Tier 2.

**QUESTION:** Will NYSERDA be setting up the new structure? Will it look like Tier 2? Will it undermine the intent of on-bill recovery? Will it make underwriting more flexible?

**RESPONSE:** On-bill will at least be the Tier 2 standard. The work NYSERDA is doing with Moody's will help to answer these questions. No market standard yet exists.

**QUESTION:** Are most of these issues resolved?

**RESPONSE:** Great progress has been made. Most of the issues have been dealt with and NYSERDA is now clarifying how it's all going to work.

**QUESTION:** Sustainable South Bronx did outreach and got 21 completed audits. Five people were denied during the financing part of the process. Will they be able to reapply because of the implemented changes?

**RESPONSE:** Yes, they will be able to reapply because of the new criteria.

**QUESTION:** Gathering utility information is also an obstacle. Will we be able to accept permission to view the customer's account to help expedite the process?

**RESPONSE:** Staff will explore that possibility to see if it is feasible and how we can more easily capture the information. It might be easier to do when applying for a loan vs. signing up for an audit because the audit is just the energy consumption and the loan looks into the actual energy usage. Customers often feel like they are being asked for more and more information. They are now being encouraged to apply for financing up front.

**QUESTION:** Since eligibility includes the question of whether energy savings meet or exceed the loan payment, what is the plan? Does that hold true?

**RESPONSE:** The 1-4 Family Homes team will continue to look at TREAT, the modeling software, which produces energy savings estimates for the consumer. The Evaluation team secures a sample of utility bills and applies a realization rate to programs. Impacts from these activities are available on the NYSERDA website. They will figure out spill over and additional savings and report back.

**d. One- to Four-Family Homes, Bryan Henderson, Senior Project Manager**

A copy of the slides and a video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Bryan reviewed the charts highlighting the \$16.5 million worth of work. Reminder letters are sent out to people who requested an audit, encouraging them to move forward. An audit doesn't necessarily lead to a completed job. The program is reaching out to contractors who have high numbers of audits with a low number of projects. They are looking for why that is occurring and what could be done to get moving on the jobs. Account Managers are going out to assist contractors with this.

**QUESTION:** How do we attribute the actual jobs to GJGNY?

**RESPONSE:** That is being tracked in the program database. Some contractors are so desperate for work that they are not even claiming their jobs as GJGNY. Some contractors never used to charge for audits anyway. They have lots of jobs, but not as many of them are in the program. Program staff is looking in to how often that is happening.

**QUESTION:** Is the marketing helping?

**RESPONSE:** Consumers are being recruited by the contractors. They don't want to lose a lead and often move forward with the job and don't wait for the program.

**QUESTION:** How does a customer know what to do?

**RESPONSE:** By using the resource map on the program website, and/or contacting the call center. There are company profiles in the works. In Ulster County, a contractor took out an ad in the local newspaper with a succinct message.

**e. Multifamily, Ed Morrison, Senior Project Manager**

A copy of the video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Ed briefly discussed the audit status, stating that at the end of July, there were 73 audit applications received. There were 44 audits logged as complete. From those, 18 projects were contracted to have measures installed.

There have been program meetings across the state, with a few coming up this fall. The financing vehicle was launched in June and that many lenders are interested. No loans have come through the program yet, but there are two projects in process of getting workscope approval (next step will be applying for a loan).

**f. Small Business & Not-for-Profit, Kathryn Fantauzzi, Assistant Project Manager**

A copy of the video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Kathryn briefly discussed FlexTech, stating that there were 319 GJGNY and 130 ARRA audits performed. NYSERDA is working on a new application process related to the Governor's application initiative.

A webinar with 43 lenders was held in July. So far, five lenders are participating and will be listed on the website. An upcoming Multifamily/Small Business & Not-for-Profit contractor and community coordinator webinar is scheduled for October.

**VI. Better Building Grant Activity, John Ahearn, Program Manager**

A copy of the video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

John stated the total award is \$40 million with \$21.4 million being subgranted to NYC; \$18.4 million is to support GJGNY. The town of Bedford received a subgrant for \$1.3 million which it is using for community level outreach. Religious and town leaders are leading by example (by having work done on their homes), and it is working. The community outreach and marketing initiative took off a few months ago. The new website has had a great response.

Efficiency First Long Island – Conservation Services Group is developing a spreadsheet to help contractors identify the various incentives available from all of the programs to share with consumers. GJGNY helps to tie it all together. The progress is good on Long Island.

**VII. Mapping of NYSERDA Residential Projects, Karen Hamilton, Program Director**

A copy of the video of the presentation can be found at [www.nyserda.ny.gov](http://www.nyserda.ny.gov).

Karen Hamilton stepped in for Chris Coll who was unavailable to speak.

The geographic mapping initiative is looking for input from the Advisory Council. There is a working group and they had one conference call. They are trying to determine how to develop the maps in a meaningful way and what other sources of data could support that. A few maps were developed and are included in the GJGNY annual report. NYSERDA views this as a very useful tool to help see what communities are and are not being reached.

**VIII. Public Input, Frank Murray, NYSERDA President and CEO**

Kevin Rooney from the Oil Heat Institute of Long Island spoke about Energy Smart Long Island. It's a new program to help consumers looking to easily navigate the cumbersome steps, and make sure the application process goes smoothly. The goal is to bring more people into GJGNY.

Karen Hamilton is grateful for the partnership. She said they have not asked the program for any money and are doing this on their own.

Kevin Rooney said that this structure can probably be used in NYC and upstate. They will soon be discussing how to have the Long Island program move forward into other territories. There will also be discussion of how to incorporate dual fuel customers.

**IX. Next Steps, Frank Murray, NYSERDA President and CEO**

The next Advisory Council meeting is scheduled for Tuesday, December 6<sup>th</sup> at 1:00 pm.