

Green Jobs-Green New York

Francis J. Murray, Jr.
Chair

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Green Jobs-Green New York

Karen Villeneuve

Introductions

- Advisory Council – three locations
- Working Group Chairs and other NYSERDA staff
- Public and other State staff
- Logistics:
 - Sign-in sheet at all three sites
 - Note-taker
 - Flip charts (“parking lot”)
 - Questions during presentations vs discussion

Overview of Green Jobs–Green New York

- Statewide initiative established in public authorities law
- Goals:
 - Promote energy efficiency, energy conservation and clean technologies
 - Reduce energy consumption and costs
 - Reduce greenhouse gas emissions
 - Support sustainable community development
 - Create green job opportunities, including for emerging, unemployed and displaced workforce

Overview (con't)

- Based on plan developed by Center for Working Families with ultimate vision of weatherizing one million homes in five years
- Signed into law by Governor Paterson in October 2009
- Names NYSERDA as the administrator of the program
- Establishes Green Jobs - Green New York Advisory Council to advise NYSERDA on creation and implementation of program

Features

- \$112 million of funding from the Regional Greenhouse Gas Initiative (RGGI)
- Revolving loan fund
- Seeks innovative mechanisms to repay energy efficiency improvements through energy cost savings
- Residential, multifamily, small business, and small not-for-profit property owners
- Energy audits to residential applicants based on a sliding fee scale (200% - 400% median county income)
- Aggressive workforce development
- Constituency-based organizations involved in outreach
- Targeting of communities (non-attainment, high energy costs)

NYSERDA Roles and Requirements

- Establish and administer the Program within 6 months of the effective date
- Chair the Advisory Council
- Award a sufficient number of grants to make it possible to fully commit the resources allocated during the initial phase of the program
- Enter into contracts with program implementers
- Consult with NYS DHCR to develop strategies to mitigate adverse economic impacts on tenants
- Issue Annual Reports

NYSERDA Roles and Requirements (con't)

- Establish Revolving Loan Fund
 - Establish separate accounts for residential (includes multifamily) and small commercial/not-for-profit loans with no less than 50% going to residential retrofits
 - Establish maximum loan amount for multifamily properties (\$13,000 residential and \$26,000 for non-residential established in law)
 - Establish terms and conditions for loans; eligibility and qualification requirements and criteria for applicants
 - Establish interest rates, to be “no higher than necessary”
 - Review applications for financial assistance (or delegate to designee)
 - Explore on-bill recovery and participation of oil industry

NYSERDA Roles and Requirements (con't)

- Energy Audit
 - Establish requirements for auditors
 - Certifications or
 - Commonly-employed energy auditing tools and technologies
 - Establish standards for energy audits based on building type and other relevant considerations
 - Establish schedule of fees for energy audits on a sliding scale based on income, and/or the number of employees for small businesses or nonprofits

NYSERDA Roles and Requirements (con't)

- Qualified Energy Efficiency Services
 - Establish standards for modifications
 - Establish standards for cost-effectiveness
- Establish standards for measurement and verification of energy savings
- Standards shall meet or exceed the standards used by NYSERDA for similar programs in existence

NYSERDA Roles and Requirements (con't)

- Competitive grants for outreach, enrollment
 - Enter into contracts with constituency-based organizations; partnerships or consortia
 - Target communities in non-attainment or with high energy costs as compared to median income
 - Preferences for MWBEs and applicants that serve distressed communities
 - Obtain geographic diversity

NYSERDA Role and Requirements (Con't)

- Training and Employment Services
 - Enter into contracts with CBOs, workforce development organizations, labor organizations
 - Facilitate job placement
 - As permitted by law or grant rules, give preference for training and placement of women, minorities, low-income and those with barriers to employment

NYSERDA Roles and Requirements (con't)

- In coordination with NYS DOL
 - Encourage local workforce investment boards to make training and services available to support this initiative
 - Access DOL services
 - Apply for ARRA and other federal funds
 - Establish standards for local hiring and pre-apprenticeship and apprenticeship and other labor-management training program participation
 - Establish certification and accreditation requirements for trainers

Green Jobs-Green New York Advisory Council

Kevin Carey

Membership

- State Agencies
- Constituency-Based Community Organizations, Consumer Advocates, Union Trades, Contractors, Investment Market Experts
- Two and Three - Year Terms

Roles and Responsibilities

- Advise NYSERDA on program design and implementation.
- Provide input on the draft operating plan prepared by NYSERDA.
- Review and comment on the program as is necessary.
- Refrain from advocating for specific projects which benefit members.

Transparency

- Meetings are open to the public
- Information posted on NYSERDA web site
- Agendas and information available prior to meetings
- Public input in the process

Advisory Council Logistics

- Meeting Schedule/Information
- Meeting Location
- Comments: Contact Peggy Neville
(MAN@nyserda.org)

Program Development and Implementation Strategy

Karen Villeneuve

Program Development and Implementation Strategy

- Open, transparent process
 - Web site
 - Working groups
- NYSERDA processes
 - Competitive solicitations
 - Strong internal controls; OSC audits consistently yield good results
 - Technical Evaluation Panel includes more external than internal members
 - Review RFP
 - Review and rank proposal
 - Stakeholder input

Program Development and Implementation Strategy

- Deliver through existing programs where possible
 - Home Performance with ENERGY STAR®
 - Multifamily Performance Program
 - Small Commercial Audit
- Coordinate with utilities, LIPA, NYPA and municipal service providers

Program Milestones

- Update of Green Jobs – Green New York web site – ongoing
- Working group meetings – ongoing
- Public input calls for outreach working group – Jan
- Advisory Council review of Revolving Loan Fund plans - Jan
- Release of RFPs for various financial services – Feb
- Advisory Council review of outreach and workforce development plans – Feb
- Release of RFP for outreach services – Mar
- NYSERDA Board approval of revised RGGI Operating Plan – Mar
- Release of PONs for workforce development opportunities – Mar; some opportunities are first-come first-served and available immediately as part of open PONs or upon release of new PON

Program Milestones

- Advisory Council review of building sector implementation plans – Mar
- Update existing implementation contracts where needed to enable quick roll-out of services – Feb/Mar/Apr
- Train existing contractor infrastructure on revised program rules and opportunities – Mar/Apr
- Train call center – Mar/Apr
- Income verification process in place –Apr
- Begin offering audits under new terms –Apr
- Begin offering at least one loan option –Apr
- Program Launch event – Apr/May
- Award contracts and train CBOs – Aug/Sep

Green Jobs-Green New York One-to-Four Family

John Jones

One-to-Four Family

- This group has been established to assist in the development the various components of the program called for in the GJGNY Bill.
- This working group will deal with aspects such as:
 - o Establishing a sliding scale for the cost of the energy audit based on income
 - o Connecting communities members through the use of Community Based Organizations to the program, including connecting contractors to those members;
 - o Establishing cost effective criteria for GJGNY projects;
 - o Establish standards based on building type and other relevant considerations.
- It is anticipated that the GJGNY initiative will fall in step with the current NYSERDA Home Performance with ENERGY STAR® (HPwES) program. Although the statute requires an implementation strategy not traditional to HPwES, it would not require a full restructuring to meet these requirements and changes.

One-to-Four Family

Status

Major areas of discussion for working group:

- First year production goals
- Interactions between Community Based Organizations and Contractors
- Consistent, statewide standards and implementation
- Using the structure of the current HPwES Program

Three sub-working groups have been developed to further look into:

1. Identify and pre-qualification of probable customers
2. Linking customers leads to Contractors
3. Free audits and barriers that may arise

One-to-Four Family

Next Steps

- Establish sliding scale energy audit fee
- Establish program coordination structure statewide
- Identify contractor support to ramp up to scale
- Explore role of municipalities
- Explore role of utilities
- Develop funding allocation structure
- Current Program modifications
- Develop any additional standards

Green Jobs-Green New York Multifamily

Pat Fitzgerald

Multifamily

This Groups' goals include:

- Recommend standards for auditing and installation of work to be financed by a GJ-GNY loan
- Recommend an income-based sliding scale for energy audits which reflect variations in building size & complexity
- Recommend limits to building & project size, Loan Limits
- Recommend cost effectiveness criteria for multifamily GJGNY projects

Multifamily

- Leverage standards established for participation in NYSERDA Multifamily Performance Program [MPP]
- Allow for access to incentives offered through other sources such as a utility rebate when appropriate.
- Encourage Constituency Based Organizations to connect participants w/MPP Partner network and others deemed capable of serving the multifamily market through compliance w/ GJ-GNY standards

Multifamily

Status:

- Met (4) times since early December, considering probable project size, optional approaches for standards for delivery of services & installations, financing concerns unique to the multifamily market, potential participants

Next steps:

- Finalize Group recommendations based on revised MPP structure and loan offer

Green Jobs-Green New York Small Commercial and Not-for-Profit

Ruth Horton

Small Commercial and Not-for-Profit

This Working Group will explore and develop program elements that lead small businesses and not-for-profits to implement energy efficiency improvements. The Green Jobs/Green NY (GJ/GNY) Act targets small businesses with less than 100 employees and not-for-profits with less than 10 employees. The Working Group will address:

- commercial audit standards and delivery of audit services;
- qualified energy services (measures) and methods to expedite their implementation; and
- outreach approaches to ensure program implementation across New York State.

Working with the Financing Working Group, the SmallBiz/NFP Working Group will also review the various options for financing energy measures through the GJ/GNY Program.

Small Commercial and Not-for-Profit

- Working Group met 3 times
- Reviewed current NYSERDA and utility audit programs
- Energy Audit/Auditor standards being drafted by NYSERDA based on input from WG
- Eligible measures and cost-effectiveness criteria being established
- Coordination with other NYSERDA and utility programs being defined

Small Commercial and Not-for-Profit

- Prepare to roll out initial phase of Energy Audit delivery using current Audit framework with modifications
- Publish Audit/Auditor standards and develop process to expand eligible audits and address quality assurance
- Use WG to help us develop strategies to encourage small businesses/nfp's to participate in program

Green Jobs-Green New York Workforce Development

Adele Ferranti

Workforce Development

The Workforce Working Group has been established to assist in the development of the Workforce Training Initiatives identified in the Green Jobs-Green New York Act. The Working Group is also assisting with developing the Program Operating Plan which will include a budget and schedule.

Workforce Development

Status:

- Several Workforce Working Group meetings held
- Subgroups formed and met to develop recommendations, budgets, and schedules:
 - Curriculum
 - Certification
 - Apprenticeships and Internships
 - Equipment and Infrastructure Needs
 - Non-Construction Jobs (sales, marketing, administrative, etc.)

Workforce Development

Next Steps:

- Recommendations of Workforce Development subgroups finalized and shared with full Working Group by 1/25
- Draft Workforce Development Operating Plan distributed to NYSERDA Core Team and NYSERDA Sr. Mgt
- Submit Draft Operating Plan to Advisory Council on 2/10 for consideration and discussion at next meeting of Advisory Council (2/18)
- Workforce program elements (PONs, etc.) implemented in March

Green Jobs-Green New York Outreach

Kevin Carey
and
Susan Moyer

Outreach

An Outreach Working Group is being established to assist in outreach, enrollment, and other related Program support services called for in the Green Jobs-Green New York Bill. The working group will develop a plan to reach individuals seeking workforce assistance, and a plan for marketing to homeowners, and businesses looking for energy efficiency programs.

Outreach

Next Steps

- Outreach and Marketing Plan and Budget Recommendation
- Outreach RFP to select Constituency-based Organizations
- Develop Message Architecture
- Implement Early Actions
 - Marketing to target Contractors -- grow the number of accredited Contractors
 - Identify available Research and any gaps
 - Develop and execute a Research Plan

Outreach

Status

- Comprehensive Outreach and Marketing Plan in Development
 - Clearly defined Target Audiences
 - Recognizes that we need a multi-faceted approach
 - Outreach in Economically-distressed Communities
 - Broad-based Marketing to build awareness and engage New Yorkers to take action
 - Properly align resources to ensure GJGNY is delivered in a targeted and cohesive way
- Drafting an RFP to Select Constituency-based Organizations in Economically-distressed Communities
 - Gathering input from experienced organizations through Stakeholder Discussions

Green Jobs-Green New York Finance

John Ahearn

and

Jeff Pitkin

Finance Working Group

- Assist in the development of the innovative financing mechanisms
- NYSERDA to establish a Revolving Loan Fund with two accounts:
 - One for 1 to 4 family homes and multifamily buildings
 - One for buildings occupied by a Small Business or not-for-profit
- Loans not to exceed \$13,000 per applicant for Residential Structures; \$26,000 per applicant for Non-Residential Structures; NYSERDA to determine for Multifamily Buildings

Finance Strategies

- Pursue multiple delivery approaches: On-Bill Recovery, Property Assessed Clean Energy (PACE), Unsecured Consumer Loan
- Approach financial market for capital now or warehouse loans using GJGNY funds until systems are in place and loans have been made
- GJGNY funds for loan loss reserve to leverage financial market investment

Finance Sub-Groups

- **On-Bill Recovery** with National Grid, DPS Staff, Rockefeller Foundation, Center for Working Families (CWF), and NRDC
- **Property Assessed Clean Energy (PACE)** with Bedford, Babylon, New York City, Rockefeller Foundation, CWF, and NRDC
- **Financial Markets** with Rockefeller Foundation, CWF, NRDC, and the Energy Programs Consortium

Financial Services RFPs

- **Financial Advisor Services** to assist NYSERDA in implementing the financial structure(s) for the Revolving Loan Fund
- **Underwriting Services** to raise capital for the two Revolving Loan Funds
- **Program Lender(s)** to develop loan application processes, make loan decisions based on approved underwriting criteria, pay the borrower or contractor, and service the loan over its full term

Finance Next Steps

- Issue RFPs
- Decide on underwriting criteria by loan type
- Balance ability to repay loan from savings against desire for comprehensive projects
- Develop finance projection with estimated number loans, loan amount, interest rate, loan term by customer class and loan type

Budget

Jeff Pitkin

Discussion

Next Steps

- Feb 18
 - Outreach plan
 - Workforce development
- March 10
 - Program plans
 - Update on loan fund