

**Green Jobs Green New York (GJGNY)  
Advisory Council Meeting Minutes**

March 19, 2013

1:00pm-4:00pm

NYSERDA Board Room

Albany NY

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 March 19, 2013. Telephone access was made available to members who could not make it to a video conference site. Also present at the meeting were NYSERDA staff members and additional staff members from Advisory Council member organizations. The meeting was videotaped and posted [on NYSERDA's website](#).

**Attendees –**

**Albany Office:**

Anne Reynolds, NYS Department of Environment Conservation; Keith Corneau, Empire State Development; Conrad Metcalf (Dick Kornbluth), Building Performance Contractors Association; Paul Shashoff (Ed Murphy), Workforce Development Institute; Mario Musolino, NYS Department of Labor; Tony Joseph, NYS Department of Labor; Mike Edmonds, Conservation Services Group NYS Energy Research and Development Authority : Frank Murray, Adele Ferranti, Jeff Pitkin, Kevin Carey, Jennifer Shauger, Jonathan Steiner, Mishel Filisha, David Munro, Dayle Zatlin, Jennifer Meissner, Carley Murray, Sue Andrews, Rebecca Sterling, Hal Brodie, Peter Savio, Jon Ahearn, Joey DeRosa, Kathryn Fantauzzi, Marilyn Dare, Karen Hamilton

**NYC Office:**

Jay Ackely, Community Environmental Center; Sharon Griffith, NYSERDA; Michael Colgrove, NYSERDA; Anthony Ng, Center for Working Families

**Buffalo Office:**

Kelly Tyler, NYSERDA; Lee Butler, NYSERDA; Eric Walker, PUSH Buffalo

**Telephone:**

Frederico Garcia, ICF Consulting; Rick Cherry, Community Environmental Center; Dan Buyer, NYS Homes and Community Renewal; David Hepinstall, Association for Energy Affordability; Barbara Guinn, Office of Temporary and Disability Services; Les Bluestone, Blue Sea Development Company; Kevin Rooney, Oil Heat Institute of Long Island; James Barry, SEIU 32BJ; Rohit Vaidya, NMR Group

**(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).)**

**I. Welcome and Introductions (Frank Murray)**

Frank Murray began the meeting by welcoming everyone and granting thanks to Advisory Council members and public participants.

## **II. Follow-up on CBO Contract Status and Budget (Karen Hamilton)**

### Budget Update

A budget update was presented to address the Outreach budget. NYSERDA is proposing a transfer of \$233,120 from Marketing into Outreach. In addition, \$2.5 million from both the Multifamily Revolving Loan Fund and the Small Business/Not-for-Profit Revolving Loan Fund will be transferred into the Outreach budget. The revised Outreach budget provides an additional two years of funding to support the GJGNY outreach efforts. This decision was made because the participation in both of those funds has been very modest. However, the Multifamily Revolving Loan Fund is starting to pick up. Both funds will continue to be monitored moving forward. Adjustments will be made as needed.

*Question:* Is this loan money available to a customer to cover the cost of oil to gas conversion?

*Response from NYSERDA:* Yes, since it is an efficiency measure.

### CBO Contracts Update

Community-Based Organization (CBO) contracts have been awarded on a competitive basis through two solicitations.

Two issues raised:

1) Addressing concern about how the current performance payments are structured under the contracts. Currently, 75% of the budget can be invoiced and will be paid on the basis of time and materials. The remaining 25% is based on progress toward their individual goals for contracted projects.

The current payment schedule provides for four equal installment payments. The first payment is issued when the first 25% of the performance goal is reached. The second payment is issued when the second 25% of the performance goal is reached, and continuing. NYSERDA has agreed to modify this performance payment schedule in response to concerns voiced and will provide updated information soon.

2) Addressing concern about what process will be used to address CBO contracts that are approaching the end of the two-year contract term. No provisions were made initially for contract extensions. Currently NYSERDA is considering options, one of which is issuing a new competitive solicitation. NYSERDA will announce as soon as possible how it intends to proceed.

*Question:* Are there other options for handling contract extensions?

*Response from NYSERDA:* One of the other options is to extend the current contracts which presents some concerns. While some CBOs are doing well, others are lagging behind. The concern is how to pick among the current contracts as to whose contracts would get extended. If people have suggestions, NYSERDA is open to them.

*Question:* Will the criteria for qualification of an organization as a "CBO" set forth in the original legislation still be used if another solicitation is issued?

*Response from NYSERDA:* Yes.

*Suggestion:* What about opening up the solicitation to teaming opportunities between established CBOs and new organizations without track records?

*Response from NYSERDA:* There is nothing preventing parties from teaming up with other parties or one another as long as they meet the requirements of the solicitation.

*Question:* Is NYSERDA considering another two year agreement with options to renew up to a given number of years beyond that?

*Response from NYSERDA:* NYSERDA is considering that as a possibility, where contracts would provide minimally for two years, then a decision would be made to provide an option for annual extensions thereafter.

Any additional suggestions regarding the solicitation should be summarized and sent to NYSERDA via email.

### **III. Small Business/Not-for-Profit Program (Small Commercial) and Financing Status (Pete Savio/Marilyn Dare)**

See presentation overview materials provided [on NYSERDA's website](#).

*Energy Assessment and Financing Metrics:* There have been 1,474 GJGNY-funded energy assessments as of February 28, 2013. The audits have resulted in 13 customer applications being submitted and approved for financing, with four loans being closed. Seven lenders have signed up to offer loans through the program.

*Question:* What are the differences between NYSERDA's EEPS small business programs approach and the GJGNY approach?

*NYSERDA Response:* Under EEPS, the majority of funding for this sector comes from the Small Business Direct Install programs administered by the utilities. From a RGGI perspective, NYSERDA's audits are all-fuels and independent third party audits. From the utilities' perspective, the audits are single fuel and only for fast payback measures. There are differences in services offered and outcomes available. GJGNY is a statewide program, going beyond the SBC footprint.

*Question:* Is it true that NYSERDA does not have an approved direct install program under EEPS?

*Response from NYSERDA:* Small business direct install is a utility only effort at this point.

The Expeditor pilot was launched on February 1, 2012 to determine which services are most effective and how to best assist customers. NYSERDA contacted 100% of the participants and offered no cost implementation assistance. Preliminary implementation findings show nearly 50% of customers were willing to talk to the expeditors. Nearly 1/3 of those respondents reported implementing at least some of the measures. Nearly 40% had already implemented measures or were interested in getting additional support. These results are in line with the goals of supporting customers to make informed energy decisions that result in implementation.

*Question:* Is there an ability to pursue followup inquiry to the respondents who report no implementation to date as to if they would do it at some point in the future, because they represent a target market for us?

*Response from NYSERDA:* The purpose of the pilot was to get such information. The program evaluation addresses this issue.

The program evaluation underway is aimed at determining the size of the Small Commercial market in New York State and identifying and assessing market and regulatory barriers to Program success.

Program evaluation is also identifying Small Commercial customer motivations and likelihood of implementation.

*Question:* Could updated questions be included in the evaluation study?

*NYSERDA response:* NYSERDA will check into it.

*Question:* On the evaluation, how did NYSERDA come to the conclusions about the need for customer support?

*NYSERDA Response:* Topics were volunteered by customers. NYSERDA didn't have an explicit set of questions about financing, but many customers volunteered the information.

*Question:* Does NYSERDA have a sense of the cost for companies of providing additional support services?

*Response:* NYSERDA has added ten percent to the budget to offer both audit and implementation assistance.

*Question:* How does that ten percent break down in terms of cost per customer?

*Response:* The budget sheet provides detail from audit to implementation.

NYSERDA needs more lender participation. NYSERDA has a four-prong approach: Direct outreach to lenders, recruitment through utilities, recruitment through EDGE contractors, and recruitment through CBOs. Materials for direct outreach include a case study, conference participation, and a financing fact sheet.

#### **IV. Multifamily GJGNY Program and Financing Program (Lee Butler/Michael Colgrove)**

See presentation overview materials provided [on NYSERDA's webpage](#).

The GJGNY financing program for multifamily is starting to see an uptick in interest and activity in loans. There are four loans in place with a total value of \$1,632,900. There are five additional loans in progress. NYSERDA is finding that the partner network is good at using financing as a tool for getting more and larger jobs.

Modifications are being made to the loan program. Projects are no longer required to receive an Energy Reduction Plan through the Multifamily Performance Program to receive GJGNY Multifamily financing. Qualified improvements analyzed for an eligible multifamily building through NYSERDA's various deployment programs will be eligible for financing. Program documents have been updated and the Multifamily Operating Plan is currently being updated to reflect these changes.

*Question:* Has on-bill financing with Multifamily begun?

*NYSERDA Response:* No. Elements are in place, but there is no definite start date set.

*Question:* What is the definition of low-rise buildings permitted in Multifamily home performance?

*NYSERDA response:* There is a decision tree that guides buildings to the appropriate programs.

#### **V. One-to-Four Family Program and Financing Status (Karen Hamilton)**

See presentation overview materials provided [on NYSERDA's webpage](#).

Occurring trends:

- 1- Total numbers of Home Performance projects and percent of projects taking advantage of audit are both increasing over the last five or six months.
- 2- The number of applications received per month for the Smart Energy loan and On-Bill Recovery are going down. Perhaps GJGNY is getting better at targeting the loans to people who are qualifying for the loans. From the launch of on-bill, there have been more applications for the On-Bill Recovery product than the Smart Energy loans.
- 3- The On-Bill Recovery loans are closing at a greater rate. There have been no changes to closing rates after the change in interest rate as of yet, but it may be too early to tell.
- 4- Tier II loans are in excess of 10 percent of total loans closing overall. GJGNY is reaching a segment of the population that were not being reached before with the traditional loan qualifications.
- 5 – In NYC the approval rate is significantly lower than in other regions of the state.
- 6- In terms of production for Home Performance over last three months, NYSERDA is doing better than a year ago, with possible exception of the North Country. Western New York and the Finger Lakes regions are increasing since last year.

*Question:* Is there any geographic breakdown for folks who have taken advantage of On-Bill option?  
*NYSERDA response:* Yes. NYSERDA has this information and it can be included in the monthly package.

*Question:* What is the impact for regions, like Long Island, where funding is no longer available for fuel oil costumers?  
*NYSERA response:* Yes, it has impacted overall production. NYSERDA did get some additional funding to support the delivered fuels projects, so those projects will start moving again. Funding should cover the waitlist, but that funding is limited.

## **VI. Public Input (Frank Murray)**

No public input

## **VII. Closing Remarks and Next Steps (Frank Murray)**

Frank Murray asked if any further issues to be raised before we adjournment.

*Question:* Will the Advisory Council members be consulted about the design of the RFP?

*NYSERDA response:* NYSERDA welcomes any thoughts now or by email.

*Comment:* Please keep it simple. The last one was long, tedious and difficult to fill out. It would be better if it were simpler.

*NYSERDA comment:* NYSERDA can't give a specific date on the release of the solicitation, but is hoping to get it out as quickly as possible. Time and simplicity will be prioritized. Please send any comments as soon as possible. The previous solicitation can be used to provide feedback. Send thoughts directly to [Sue Andrews](#). April 5, 2013 would be an appropriate due date for comments. Once the solicitation is on the street, NYSERDA is extremely limited in discussion about it.

Frank Murray thanked everyone for their participation. The next meeting of the Green Jobs Green New York Advisory Council is set for June 13, 2013.