

New York State Energy Research and Development Authority

Green Jobs – Green New York July 2015 Monthly Update

Period ending July 31, 2015

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Program Description

Green Jobs – Green New York 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 [Green Jobs – Green New York Act of 2009](#).

1 Workforce Development

The Green Jobs – Green New York Program 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.

Training Program Updates

Clean Energy Technical Training

Through July 2015, NYSERDA’s GJGNY training partners have trained 3,615 individuals in courses including solar thermal installation, introductory photovoltaic training, advanced air sealing, pressure diagnostics, Building Performance Institute (BPI) Basic Air Sealing and Insulation, oil heat technology, and thermography. Training partnerships include public and private educators, professional associations, and not-for-profits. In addition, NYSERDA supports individuals in earning BPI certifications under the open enrollment Clean Energy Certifications and Accreditation Incentives Program Opportunity Notices (PON 2397)—many of whom complete field testing at NYSERDA-sponsored pressure houses across the state.

Under the Energy Efficiency Career Pathways Training and Technical Training Program Opportunity Notice (PON 1817) the State University of New York at Stony Brook has developed specialized Small Commercial Assessment training, in cooperation with the United States Green Buildings Council, specific to building stock in New York City. Small Commercial Energy Assessment training developed under this initiative is based on existing American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) standards for Level 1 and Level 2 assessments. Stony Brook conducted three pilot training sessions in Long Island, Syracuse, and Buffalo, receiving more than 181 applications for 75 available openings in the classroom. A total of 63 individuals completed the training. The curriculum was well-received and adapted based upon the feedback from the group. Stony Brook is considering using components of the curriculum as stackable learning modules for employed contractors.

2 Outreach and Marketing

GJGNY Outreach and Marketing provides for community-based outreach, enabling one-on-one assistance with the process of participating in the GJGNY Program. This, combined with both print and electronic statewide marketing initiatives, increases the reach of the program, particularly among disadvantaged populations and those not traditionally participating in energy-efficiency programs.

2.1 Outreach Activities

Community-based organizations (CBOs) continue to assist customers to access the Home Performance with ENERGY STAR program (HPwES) offered through Green Jobs-Green New York. Through July 2015, CBOs are responsible for 5,554 completed assessments resulting in 1,607 completed retrofits. Approximately 51 percent of those retrofits were for Assisted HPwES customers who have a household income of up to 80 percent of the county median income, which is the target market for CBOs. The remaining 49 percent of customers reached by CBOs are higher income households.

Figure 2-1. CBO Percentage of GJGNY Completed Assessments.

Figure 2-1 provides percentages of GJGNY residential assessment completions by quarter that were initiated by CBOs versus other sources, such as home performance contractors or online searches.

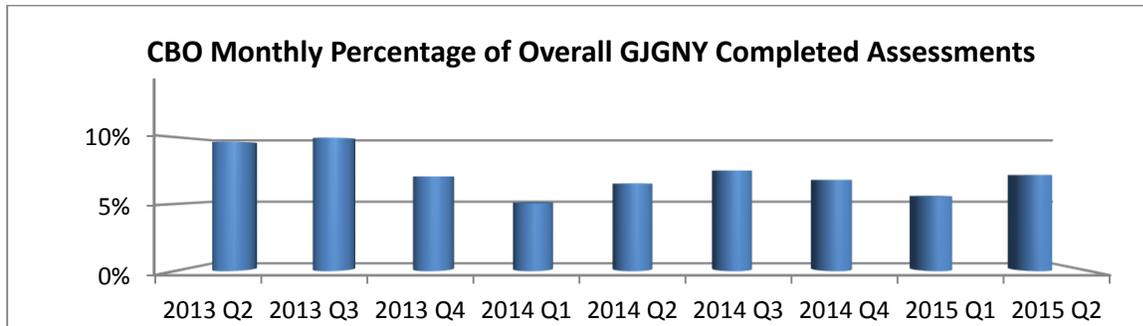


Figure 2-2. CBO Percentage of GJGNY Unit Completions.

Figure 2-2 provides percentages of project (by number of units) completions by quarter that were initiated by CBOs.

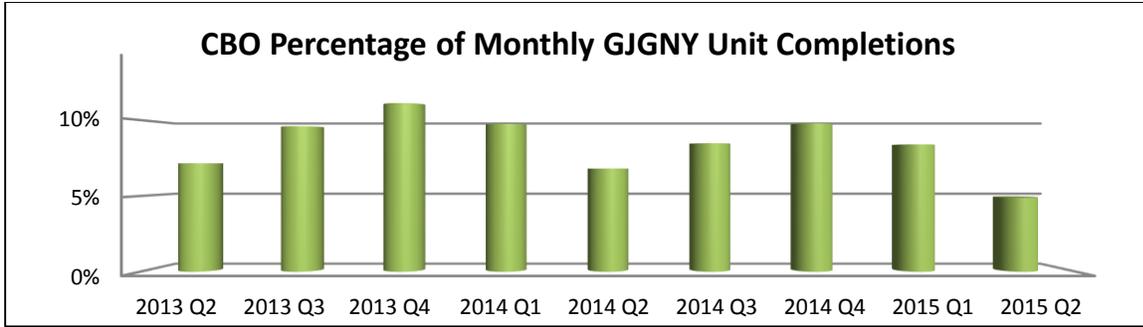
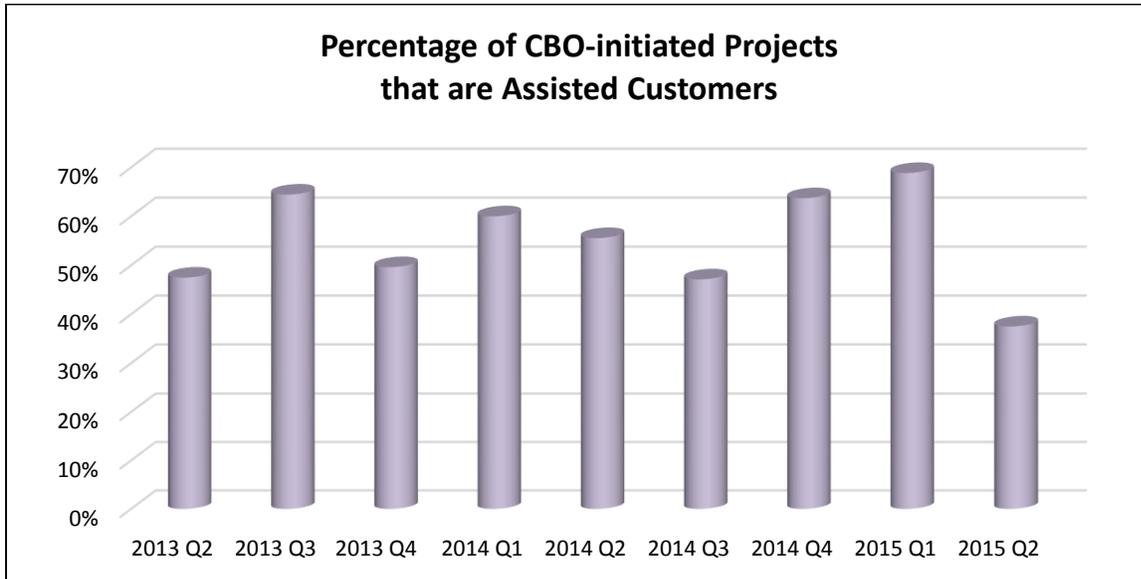


Figure 2-3. Percentage of CBO-initiated Projects that are Assisted Customers.

Figure 2-3 provides percentages of project completions for Assisted Home Performance customers by quarter that were initiated by CBOs.



CBO Meetings

On July 15, 2015 the Training and Implementation Contractor (TIC) presented the latest CBO metrics and outreach initiatives at the Creating an Industry Working Group (CIWG) meeting at NYSERDA’s Albany offices. NYSERDA meets regularly with stakeholders in the residential energy efficiency sector, participating in the CIWG meetings, to discuss program challenges and opportunities. The outreach and marketing update was on the statewide CBOs successful outreach strategies and marketing campaigns.

On July 22, 2015 the TIC held the second HPwES / CBO coordination meeting. The agenda for the meeting included:

- CBO Project Tracking
 - Memo review - Request for CBO Attribution Fields in the HP Node of CRIS
 - Memo review - CBO HPwES Program Systems and Technology Concerns
- NYSERDA's request from RUPCO on HPwES stalled customer data
- NYSERDA EmPower updates and communication to CBOs
- HPwES marketing materials
- HPwES Net Promoter Score
- Sustainable South Bronx (SSBx) Shorehaven project update
- CBO - Contractor relations
 - CIWG presentation for contractors on CBO program metrics and initiatives
 - CBO Bi-monthly webinar - communication of trends in work scope approval times

Monthly CBO Downstate Convening

The monthly CBO Downstate Convening was held on July 15, 2015 at the Pratt Institute in Manhattan. Through coordination with Angela Tovar at Sustainable South Bronx, Mathias Bell from the Rocky Mountain Institute was a guest speaker. The Downstate CBOs discussed planning for a presentation on the Affordable Housing Corporation grant process by Neighborhood Housing Services of Jamaica and Neighborhood Housing Services of Staten Island for contractors and other regional CBOs, completing the Contract Pricing Proposal Form necessary for the 2016 CBO Contract Extensions, and updates on NYSERDA's Low-to-Moderate Income Working Group meetings.

Communications with CBOs

In the month of July, the TIC posted to SharePoint information on various trainings and webinars such as Energize NY's PACE Finance program training, Department of Energy Building America Solution Center Tools and Content, Clean Energy Fund, Minorities and Energy Climate Change's Regional Impacts, new OSHA rules, as well as details on the CBO bi-monthly webinar. SharePoint was also utilized to disseminate information the "So What's Next" brochure, the announcement of the Community Distributed Generation program, and updates on the Home Performance program. Other programmatic updates were disseminated through Home Performance webinars as well as SharePoint announcements, blog posts, and calendar events.

Incorporating Energy Efficiency into Solarize Campaign

In the second quarter of 2015, RUPCO became a central partner in the Solarize Hudson Valley campaign and provides information about financing and energy assessments for those who are not eligible for a solar electric system. Additionally, Solarize Hudson Valley and its partners have fully integrated the promotion of home energy assessments as a first step toward installing solar power by reducing usage first and installing a "right-sized" solar system. In July, RUPCO attended the following Solarize outreach events:

- Dutchess County: Solarize Beacon 7/11/2015
- Ulster County: Solarize Woodstock 7/13/2015
- Ulster County: Solarize Rosendale 7/15/2015
- Orange County: Solarize Goshen 7/18/2015
- Orange County: Solarize Warwick 7/21/2015
- Ulster County: Solarize Kingston Workshop 7/22/2015
- Dutchess County: Solarize Beacon 7/23/2015
- Orange County: Solarize Goshen 7/30/2015

Michael D'Arcy of RUPCO worked with the Solarize team to create a customized PowerPoint presentation for each community hub that is promoting the Solarize Hudson Valley campaign. Michael included information on the New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR® program and the NYSERDA Green Jobs Green New York Financing options.

In July, RUPCO, in partnership with GRID Alternatives Tri-State, was awarded a \$25,000 Grant from NeighborWorks America to install a minimum of ten solar photovoltaic systems in low to moderate income (LMI) households (under 80 percent area median income). The project seeks to promote environmental justice by identifying and serving LMI income neighborhoods in Kingston which have had limited access to installation of solar technology, and are found to have suitable structures and south-facing roof orientations. Each home will also be required to complete a Home Energy Assessment through NYSERDA. Installation will be completed through volunteers and job trainees to implement solar power and energy efficiency for low-income families. RUPCO will also match funds provided by NeighborWorks America to complete each project. GJGNY on-bill financing can also be utilized for gap funding, and the city of Kingston may have Community Development Block Grant funds available for certain aspects of the rehab of the property.

Bi-monthly CBO Webinar

The bi-monthly CBO webinar was held on July 23, 2015. Topics covered include:

- SSBx Pilot – Engaging a Homeowner Association
- Clean Energy Fund Supplement Filing Update
- NY HP Portal Analytics
- General program updates:
 - Staffing changes at Energy Finance Solutions
 - EmPower program update
 - MPP program update
 - How to determine HPwES Contractor service territories
 - NYSERDA Marketing Materials: “What’s Next” brochure
 - Updates on HPwES relevant OSHA regulations
 - Update on shared renewables

2.2 Marketing Activities

NYSERDA continues to assist CBOs with updating their logos to be in compliance with the statewide rebranding effort. CBOs utilized the print marketing materials (i.e. the “So What’s Next” brochure) to expand the reach of the Green Jobs-Green New York Program. Ongoing electronic marketing initiatives include the maintenance of a CBO Locator webpage that assists customers in finding a participating CBO in their region.

3 One- to Four-Family Residential Buildings Program

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 Home Performance contractors accredited by the Building Performance Institute (BPI) conduct energy assessments and upgrades. Income-qualified homeowners are eligible for additional incentives to make energy improvements.

3.1 Home Performance with ENERGY STAR® Assessments

Through July 2015, from the 101,069 approved assessment applications, 77,211 (76 percent) assessments have been completed. In the month of July, 2,268 free/reduced-cost comprehensive home energy assessment applications were received. The conversion rate from assessment to energy retrofit is 31 percent. The average cycle time between assessment completion to project completion is 110 days.

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

Table 3-1 provides HPwES monthly and cumulative assessment figures.

Timeframe	CBO Initiated since 11/1/11 ^a	GJGNY Totals since 11/15/10 ^b	
Received Audit Applications			
July	180	2,268	
Program to Date	8,862	106,298	
Average # of Applications Received per Month	197	1,881	
Approved Audit Applications			
Free			
July	214	2,375	
Program to Date	8,214	93,330	
Reduced Cost			
July	16	187	
Program to Date	463	7,739	
Total Approved Audit Applications	8,677	101,069	
Average # of Applications Approved Per Month	193	1,789	
Scheduled Audits			
Scheduled Audits as of End of Current Month	66	5,694	
Completed Audits			
Goal: (77,500-Audits)	Free		
	July	144	1,605
	Program to Date	5,252	71,496
	Reduced Cost		
	July	6	122
	Program to Date	302	5,715
Total Completed Audits	5,554	77,211	
Audit Funds Invoiced to Date		\$19,653,120	

^a Round 2 CBO production as of 6/1/2012.

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

3.2 Home Performance with ENERGY STAR® Projects

Of the 19,998 projects completed through HPwES resulting from a GJGNY assessment and/or GJGNY financing, 6,367 (32 percent) projects are associated with income-qualified customers who have a household income of up to 80 percent of the county median income.

In July 2015, there were 572 HPwES project completions. Of the 572 HPwES project completions, 530 (93 percent) were associated with a GJGNY assessment or loan. Thirty-one percent of the July GJGNY HPwES project completions were for income-qualified customers who have a household income of up to 80 percent of the state or county median income.

Table 3-2. Home Performance with ENERGY STAR Projects.

Table 3-2 provides HPwES monthly and cumulative project figures.

Timeframe	CBO Initiated since 11/1/11	GJGNY Totals since 11/15/10 ^a	HPwES Totals since 11/15/10 ^b
Projects Contracted			
To Date	1,722	20,196	NA
Completed Projects/Units^c			
Assisted			
July	5 / 5	163 / 167	166 / 173
Program to Date	698 / 820	6,367 / 6,719	6,835 / 7,201
Market Rate			
July	32 / 32	336 / 339	364 / 370
Program to Date	732 / 787	13,613 / 13,776	21,423 / 21,962
Total Completed Projects/Units (Project Goal: 25,000)	1,430 / 1,607	19,998 / 20,495	28,258 / 29,163
^a Projects completed resulting from a GJGNY Audit and/or GJGNY Financing. ^b Total HPwES including GJGNY Projects. ^c Projects completed and units served resulting from GJGNY.			

3.3 One- to Four-Family Residential Buildings Financing

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.

As of July 31, 2015, 9,893 Residential GJGNY Loans have closed to date, comprising of 8,451 Home Performance with Energy Star® (HPwES) loans, 1,440 Photovoltaic (PV) loans, 1 Solar Thermal (ST) loan and 1 Renewable Heat NY (RHNY) loan. Of the 9,893 total loans closed, 13.3 percent are Tier 2 customers, representing 13.1 percent of the total funds, while 86.7 percent are Tier 1 customers representing 86.9 percent of the funds.

Of the 8,451 HPwES loans closed to date, 28.9 percent are for Assisted HPwES customers, representing 21.8 percent of the total funds; while 71.1 percent are for Market Rate customers representing 78.2 percent of the total funds; 13.1 percent are Tier 2 customers, representing 12.6 percent of the total funds, while 86.9 percent are Tier 1 customers representing 87.4 percent of the funds. Of the loans closed for Assisted HPwES customers, 74.9 percent are Tier 1 loans, while 25.1 percent are Tier 2.

Since the launch of On-Bill Recovery, 30.4 percent of the Assisted HPwES customers who access financing use OBR Loans, while 37.3 percent of the Market Rate HPwES customers who access financing use OBR Loans; 30.3 percent of Tier 2 customers use OBR Loans while 36.1 percent of Tier 1 customers use OBR Loans.

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Table 3-3. Green Jobs–Green New York Financing Details.

Table 3-3 provides cumulative details of the Green Jobs–Green New York financing program. EE= energy efficiency only. PV = PV only. EE & PV = a loan incorporating both energy efficiency and PV. RH = renewable heat (pellet or wood stoves).

GJGNY Loan Type	Applications Received (number)	Applications Approved (number)	Loans Closed (number)	Loans Closed (dollar)	Loans Awaiting Closing (number)	Loans Awaiting Closing (dollar)
EE Smart Energy Loan	12,411	8,914	5,845	\$55,707,537	555	\$5,694,269
EE On-Bill Recovery Loan	7,471	5,065	2,606	\$29,068,198	221	\$3,471,860
Total	19,882	13,979	8,451	\$84,775,735	776	\$9,166,129
PV Smart Energy Loan	1,756	1,580	708	\$11,971,727	413	\$7,291,052
PV On-Bill Recovery Loan	2,681	2,274	723	\$12,392,286	470	\$7,812,600
Total	4,437	3,854	1,431	\$24,364,012	883	\$15,103,652
EE & PV Smart Energy Loan	60	44	7	\$122,328	5	\$61,553
EE & PV On-Bill Recovery Loan	153	85	2	\$42,993	2	\$30,539
Total	213	129	9	\$165,321	7	\$92,092
RHNY Smart Energy Loan	3	3	1	\$24,850	1	\$1,950
RHNY On-Bill Recovery Loan	0	0	0	\$0	0	\$0
Total	3	3	1	\$24,850	1	\$1,950
ST Smart Energy Loan	1	1	1	5,075	0	0
ST On-Bill Recovery Loan	0	0	0	0	0	0
Total	1	1	1	\$5,075	0	\$0
Grand Total	24,536	17,966	9,893	\$109,334,993	1,667	\$24,363,823

Table 3-4. Green Jobs–Green New York Financing Summary.

Table 3-4 provides a cumulative summary of Smart Energy Loan and On-Bill Recovery Loan activity.

Smart Energy		Financing Summary	On-Bill Recovery	
Tier 1	Tier 2		Tier 1	Tier 2
5,668	894	Loans Closed	2,913	418
\$58,665,118	\$9,166,399	Value	\$36,360,588	\$5,142,888
\$10,350	\$10,253	Average Loan	\$12,482	\$12,304
12.9 Years	13.9 Years	Average Term	14.6 Years	14.6 Years
N/A	N/A	2.99%	27.94%	22.01%
83.72%	81.77%	3.49%	72.06%	77.99%
16.28%	18.23%	3.99%	N/A	N/A
77.36%		Approval Rate*	75.08%	
17.53%		Denial Rate*	20.48%	
5.11%		Denied Tier 1, didn't pursue Tier 2*	4.44%	

* Does not include applications pending review or withdrawn.

Figure 3-1. Home Performance with ENERGY STAR Completions, Quarterly.

Figure 3-1 illustrates trends in HPwES project completions associated with GJGNY assessments or loans, by quarter.

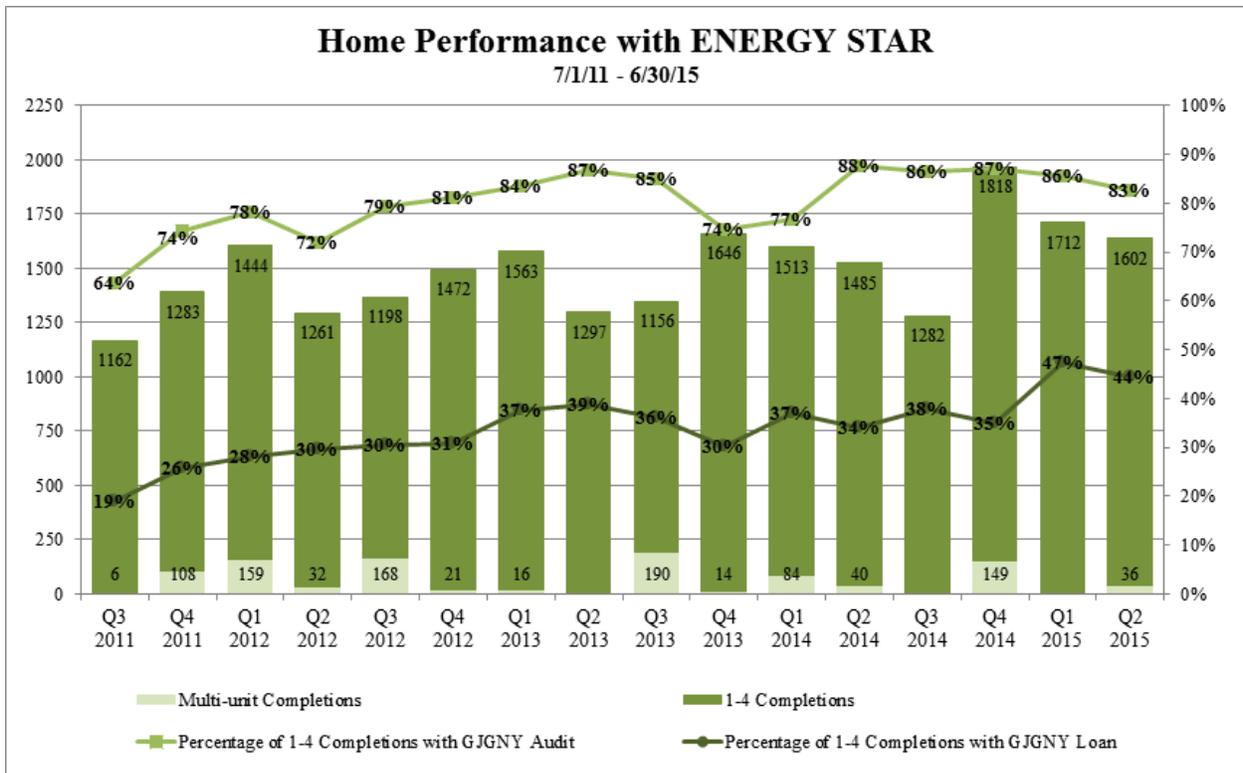


Figure 3-2. Green Jobs–Green New York Financing Applications Received, Quarterly.

Figure 3-2 illustrates the rate of applications received for GJGNY Smart Energy Loans and GJGNY On-Bill Recovery Loans, by quarter.

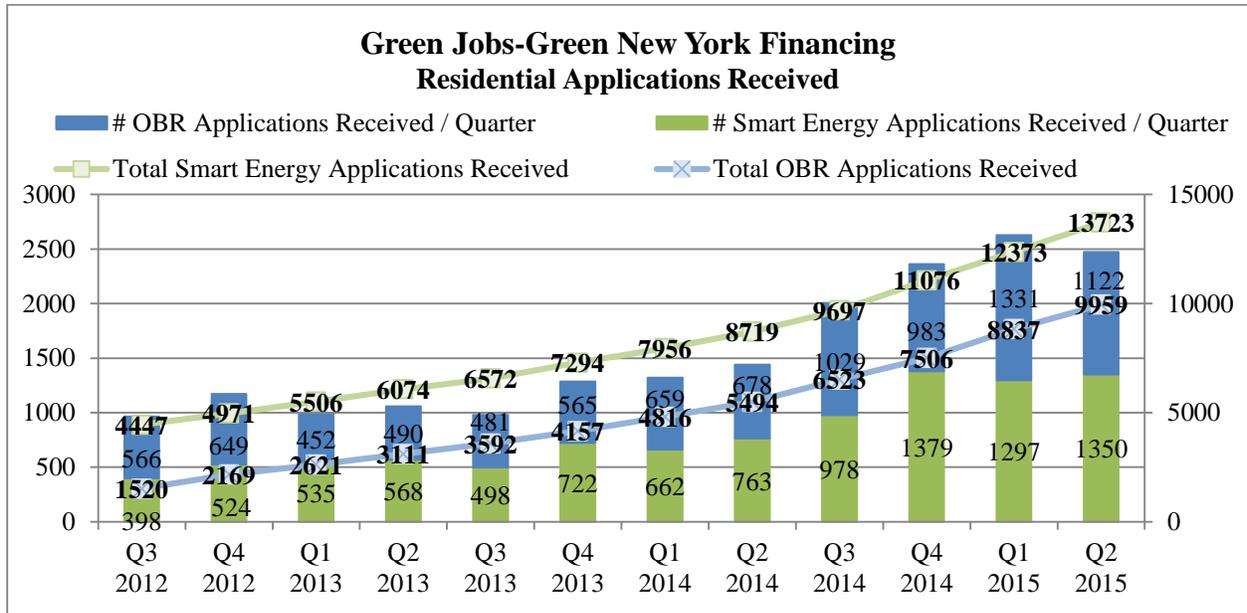


Figure 3-3. Green Jobs–Green New York Financing Loans Issued by Type, Quarterly.

Figure 3-3 illustrates the rate of loans issued for GJGNY Smart Energy Loans and GJGNY On-Bill Recovery Loans, by quarter.

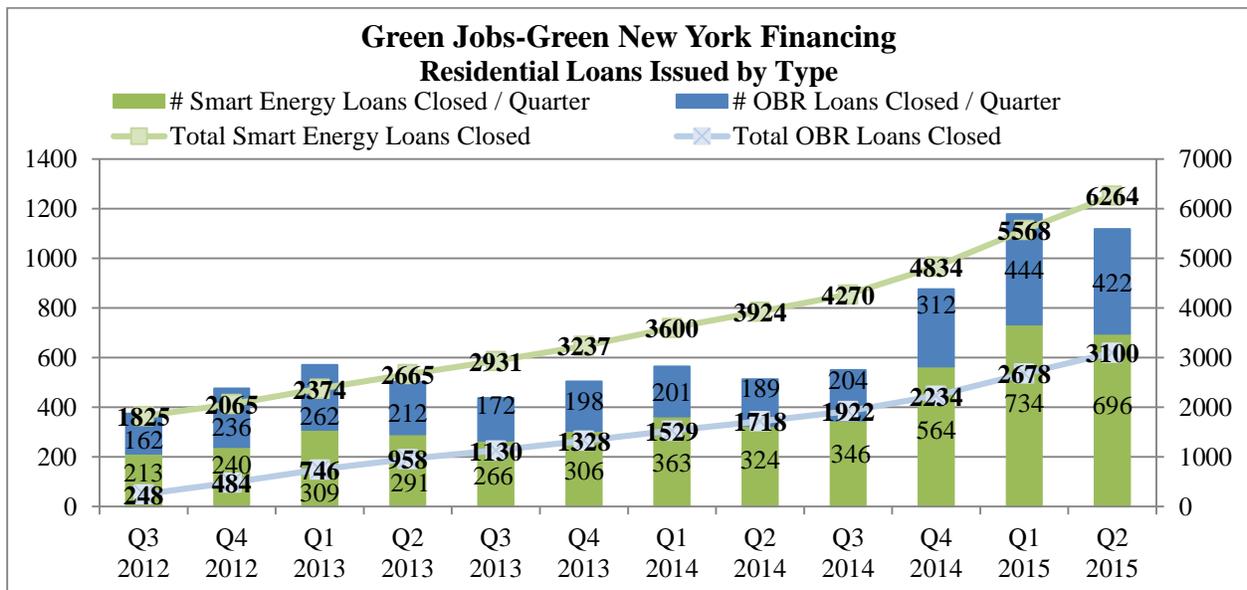


Figure 3-4. Green Jobs–Green New York Financing Loans Issued by Tier, Quarterly.

Figure 3-4 illustrates trends in GJGN Y loans issued, distinguished between Tier 1 and Tier 2 loans, by quarter.

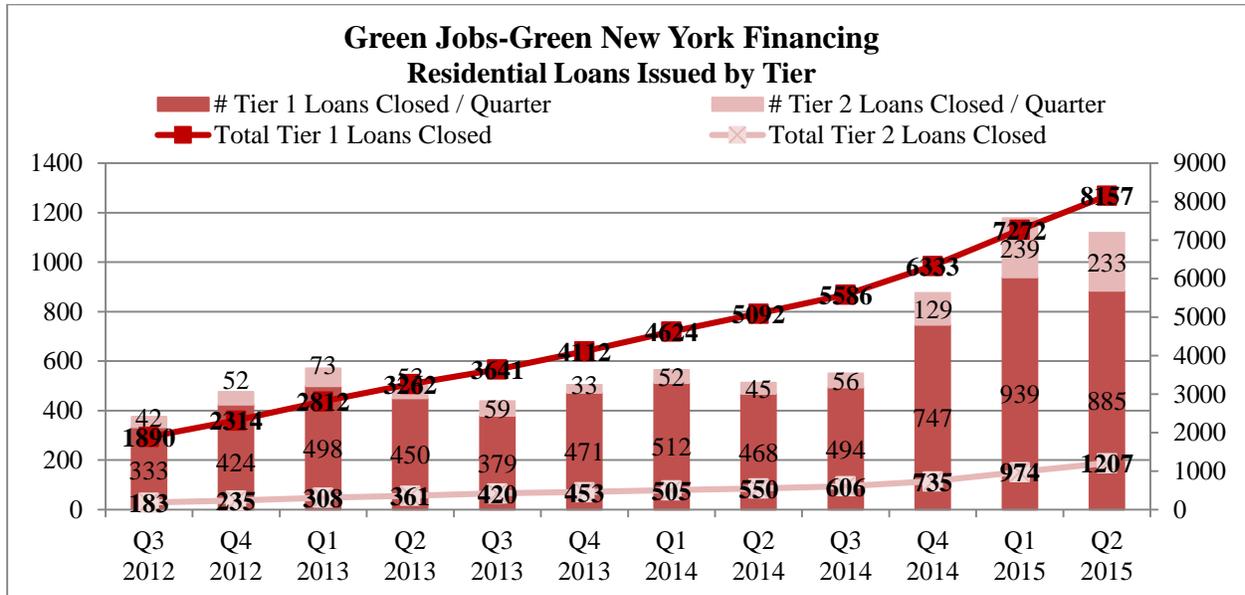


Figure 3-5. Green Jobs–Green New York Financing Loans Denied by Type, Quarterly.

Figure 3-5 illustrates trends in GJGN Y loan denials, distinguished between Smart Energy Loans and On-Bill Recovery Loans, by quarter.

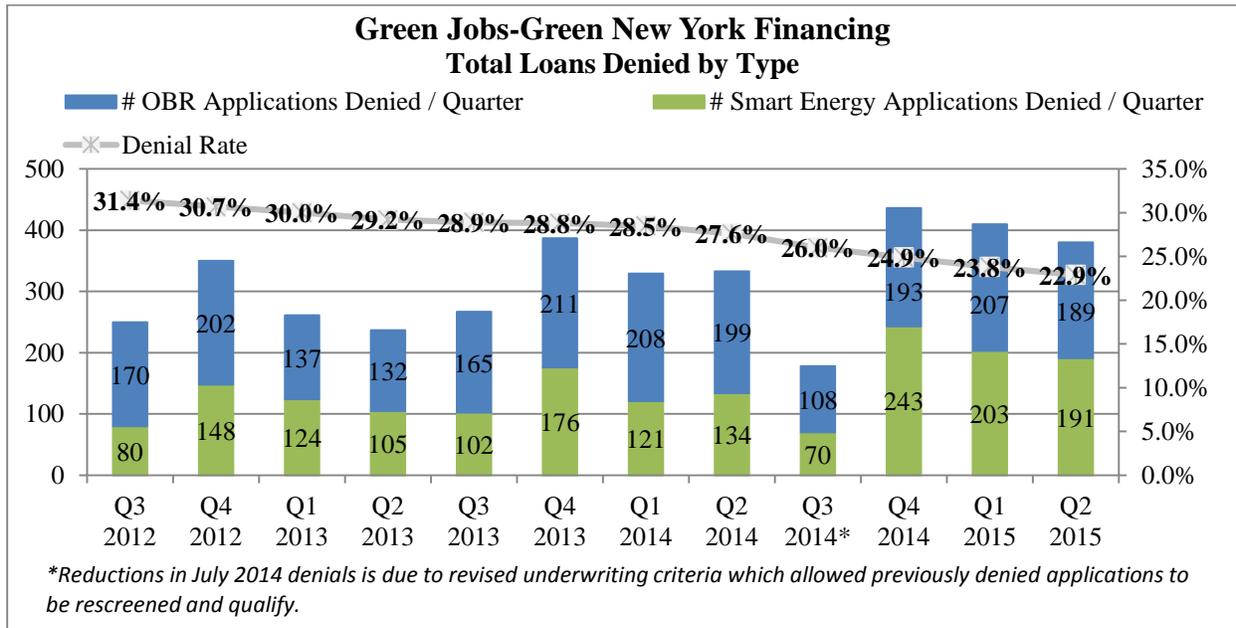


Figure 3-6. Green Jobs–Green New York Financing Loans Denied for Debt-to-Income Ratio, by Region.

Table 3-6 illustrates regional differentiation for received GJGNV loan applications and loan denial rates. Over time, the loan denial rate across all regions has dropped from 39.8 percent in November 2010 to 22.6 percent in July 2015.

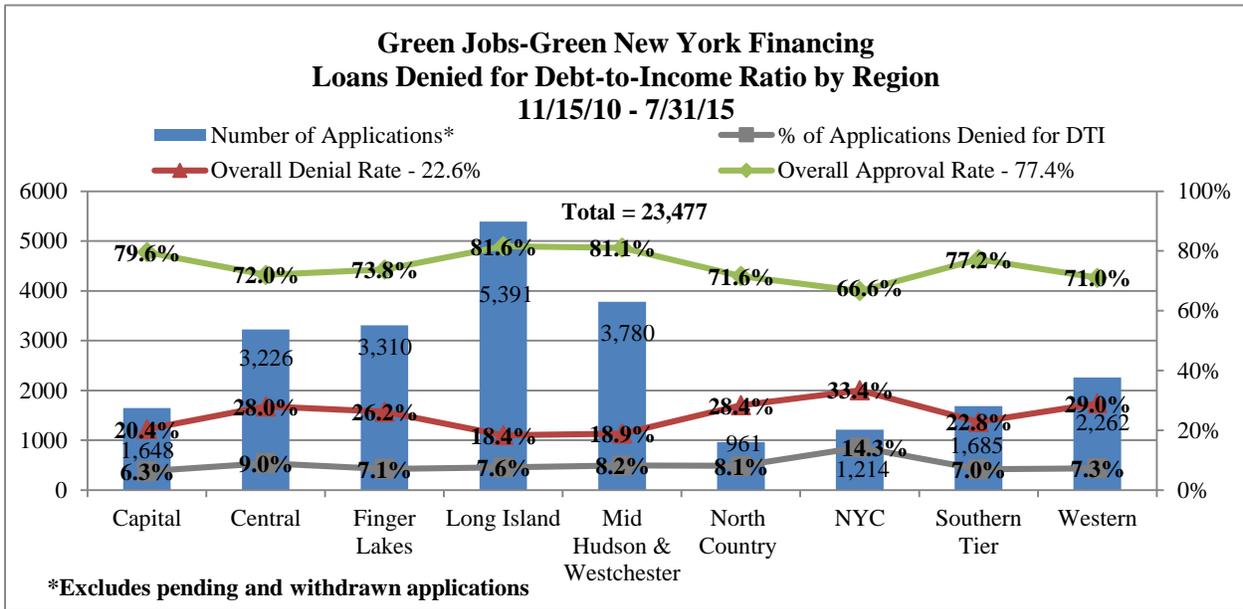


Figure 3-7. Green Jobs–Green New York Financing Percentage of Applications Denied, comparative by quarter.

Figure 3-7 illustrates comparative quarterly changes in loan denial rates. The four regions displayed represent those with the highest denial rates in the program.

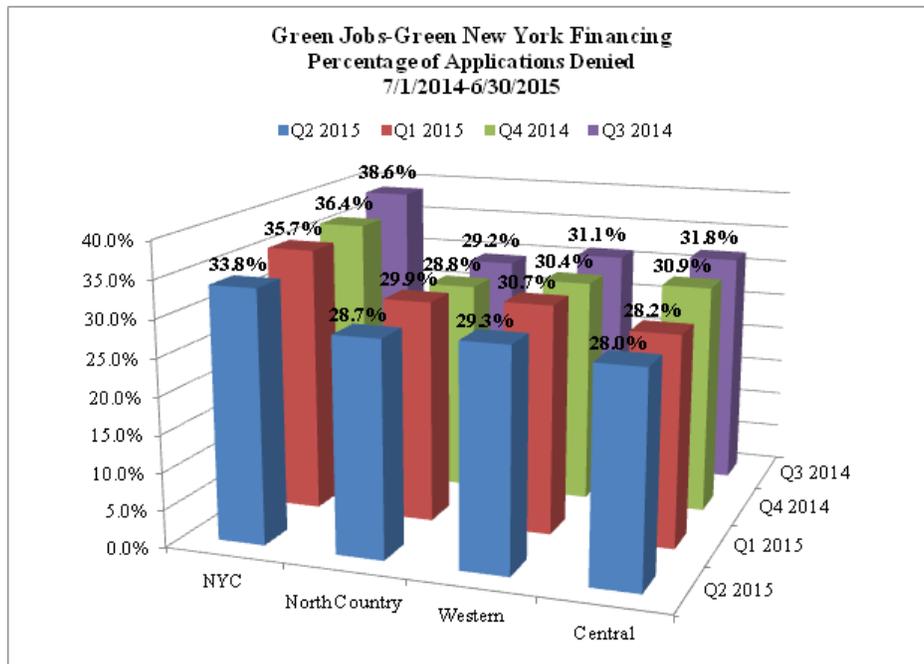


Table 3-5. Green Jobs–Green New York Financing Loans Transferred from OBR to Smart Energy.

NYSERDA allows applicants whose projects are unable to meet the cost-effectiveness requirements of the On-Bill Recovery (OBR) loan product transfer to the Smart Energy loan product. Table 3-5 illustrates the transfer activity between the On-Bill Recovery and Smart Energy loan products. In July 2015, 67 loans were transferred from OBR to Smart Energy. Over the life of the program, 16.9 percent of pre-approved OBR loans were transferred to Smart Energy loans.

Smart Energy Loan Status	Cumulative Number of Loans
Pre-Approved	117
Loan Approved	158
Loan Sold	1,003
Loan Withdrawn	109
Loan Denied	15
No Loan - Subsidy Only	42
Total Number of Loans Transferred	1,444

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.

4.1 Multifamily Energy Performance Assessments

Through July 2015, from the 333 approved assessment applications, 304 (91 percent) assessments have been completed.

Table 4-1. Multifamily Energy Performance Assessments.

Table 4-1 provides Multifamily Performance monthly and cumulative assessment figures.

Metric	July			Cumulative			
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total	Budget/ Goal
Received Assessment Applications	-2	-1	-3	193	140	333	
Approved Assessment Applications	-2	-1	-3	193	140	333	500
Assessment Funds Encumbered (\$)	-9,500	-6,720	-16,220	2,342,960	1,120,987	3,463,947	
Assessment Funds Invoiced (\$)	31,650	107,900	139,550	1,291,100	\$694,930	1,986,030	3,000,000
Completed Assessments	0	1	1	170	134	304	400
Number of Projects Withdrawing from MPP after Assessment*	0	0	0	17	29	46	
<p>*MPP Projects must achieve a minimum of 15 percent in energy savings. Projects may choose to proceed outside MPP. Some may chose 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. NOTE: Decreases reported in Assessment Funds Encumbered are due to project attrition.</p>							

4.2 Multifamily Energy Performance Projects

Through July 2015, the Multifamily Energy Performance Program has completed 31,696 housing units with installed measures. Of those units with installed measures, 17,498 (55 percent) are associated with affordable housing.

Table 4-2. Multifamily Energy Performance Projects.

Table 4-2 provides Multifamily Performance monthly and cumulative project figures.

Metric	July			Cumulative		
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total
Projects in Pipeline*	-2	-1	-3	193	140	333
Projects Contracted to have Measures Installed	-2	-1	-3	193	140	333
Households Associated with Projects Contracted	150	128	278	32,785	32,817	65,602
Projects with Installed Measures (units)	3,822	7,016	10,838	15,539	17,355	32,894
kWh Savings of Installed Measures	-47,508	-429,696	-477,204	13,810,878.6	4,103,148.2	17,914,027
MMBtu Savings of Installed Measures	-145	4,207	4,062	198,280.1	177,455.9	375,736
Dollar Savings of Installed Measures	\$3,537,501	\$4,176,675	\$7,714,176	\$9,611,178.24	\$7,147,540.00	\$16,758,718.24
<p>*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.</p> <p>**The projects in pipeline program total includes all projects that are part of GJGNY, inclusive of those projects that dropped out.</p> <p>NOTE: Decreases reported in Projects Contracted are due to project attrition.</p>						

4.3 Multifamily Energy Performance Financing

As of July 2015, the Multifamily Performance Program has closed 16 loans with a total value of \$10,416,508. NYSERDA’s share of that total loan value is \$3,289,451.

Table 4-3. Multifamily Energy Performance Financing.

Table 4-3 provides Multifamily Performance monthly and cumulative financing figures.

Loan Status	July			Cumulative		
	Number	NYSERDA Share of Total Loan Value	Total Loan Value	Number	NYSERDA Share of Total Loan Value	Total Loan Value
Participation Agreements Approved	0	\$0.00	\$0.00	21	\$4,403,520	\$9,243,688
Loans Closed	1	\$463,275	\$926,550	16	\$3,438,883	\$10,520,238

5 Small Commercial Energy Efficiency Program

NYSERDA’s Small Commercial Energy Efficiency Program offers financial and technical assistance to help small businesses and not-for-profit organizations improve their energy efficiency and reduce their energy costs. This program offers free assessments to help identify economically viable improvements, (e.g. lighting, motors or thermostats) that may yield substantial annual energy savings and two low-interest loan options to finance energy efficiency projects. The first one is On-Bill Recovery Financing, which makes it possible for small businesses and nonprofits to use the savings on their energy bills to pay for their energy efficiency upgrades. The second one is the Participation Loan, where NYSERDA partners with lenders across New York State to help small businesses and nonprofits access low-interest financing for energy efficiency improvements.

The Small Commercial Energy Efficiency Program continues to improve processes and services that enable Program participants to increase project installations resulting from energy assessments. This includes improving the communication of energy assessment results to small business and nonprofit customers, providing additional follow-up services to support implementation, and increasing outreach to lenders in order to raise lender awareness and increase lender participation in Small Commercial Energy Efficiency Financing made available by GJGNY. In addition, eligible small business and not-for-profit customers participating in NYSERDA’s NY-Sun Solar PV Incentive Program can now access low-interest GJGNY financing to install solar PV systems of up to 200 kW.

5.1 Small Commercial Energy Efficiency Assessments

Through July 2015, the Small Commercial Energy Efficiency Program has received 3,795 assessment applications. Of those received applications, 3,467 (91 percent) have resulted in completed assessments.

Table 5-1. Small Commercial Energy Efficiency Assessments.

Table 5-1 provides Small Commercial Energy Efficiency monthly and cumulative assessment figures.

Metric	July			Program Cumulative		
	GJGNY	ARRA*	Monthly Total	GJGNY	ARRA*	Program Total
Received Assessment Applications	38	0	38	2,861	934	3,795
Completed Assessments	43	0	43	2,618	849	3,467
*The GJGNY Act of 2009 restricts the provision of GJGNY-funded energy assessments to small business and not-for-profit organizations with 10 employees or less. American Recovery and Reinvestment Act of 2009 (ARRA) funds were used for eligible small business and not-for-profit organizations that have more than ten employees. ARRA funding expired on September 30, 2013.						

5.2 Small Commercial Energy Efficiency Projects

Through July 2015, the Small Commercial Energy Efficiency Program estimates 693 project completions as a result of GJGNY funded assessments.

Table 5-2. Small Commercial Energy Efficiency Projects.

Table 5-2 provides Small Commercial Energy Efficiency monthly and cumulative project figures.

Metric	July	GJGNY Program Cumulative
Estimated Projects Completed*	9	693
*NYSERDA conservatively estimates that twenty percent of energy efficiency improvements recommended on energy assessments are implemented by small business and not-for-profit customers. 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 July 2015, the Small Commercial Energy Efficiency Program has closed 24 loans with a total value of \$1,408,565. NYSERDA’s share of that total loan value is \$749,418.

Table 5-3. Small Commercial Energy Efficiency Financing.

Table 5-3 provides Small Commercial Energy Efficiency monthly and cumulative financing figures.

Loan Status	July			Program Cumulative		
	Number	NYSERDA Share of Total Loan Value	Total Loan Value**	Number	NYSERDA Share of Total Loan Value	Total Loan Value**
Applications Approved*						
Participation Loans	6	\$159,819	\$319,637	71	\$1,596,447	\$3,376,482
On-Bill Recovery	5	\$202,108	\$302,108	41	\$1,378,520	\$1,817,229
Loans Closed						
Participation Loans	1	\$21,183	\$42,365	18	\$576,212	\$1,264,541
On-Bill Recovery	0	\$0	\$0	8	\$202,205	\$202,205
Total**	1	\$21,183	\$42,365	26	\$778,417	\$1,466,746
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 percent of the total energy efficiency 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 Currently Underway

Three evaluations are in various stages of implementation and nearing completion.

- The evaluation of the Home Performance with ENERGY STAR (HPwES), which includes a process evaluation, market characterization, and an analysis of CBO efforts is nearing completion. The data analysis is complete and NYSERDA is working to publish the results of this evaluation in August 2015.
- As a part of the impact evaluation of the HPwES program, the evaluators are seeking to assess the energy-related impacts of GJGNY audit-only participants. Evaluators have completed the pre- and post-consumption billing analysis designed to assess the energy saving impacts associated with homeowners who received a GJGNY audit and did not pursue participation in the NYSERDA residential programs. NYSERDA will work toward having the preliminary results of this evaluation available Summer 2015.
- The evaluation of the Small Commercial Energy Efficiency Program seeks to quantify the impacts of the program by measuring the adoption rate over time, assessing the degree of program influence on the participant decision making and the proportion of installed measures for which customers accessed other NYSERDA funding. Data analysis is complete and preliminary results are expected in August 2015.