



New York State Energy Research and Development Authority

Green Jobs – Green New York June 2014 Monthly Update

Period ending June 30, 2014

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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 NYSEERDA 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

Pressure Houses for Field Training and Testing

NYSERDA sought proposals to establish up to three lab “pressure houses” for use in connection with classroom instruction, field activities, and field testing for green job worker certifications. A “pressure house” is a small house or house-like lab facility used to teach duct testing, blower door testing, combustion appliance zone pressure testing, combustion appliance testing, and other services for the residential and small commercial market. An increased number of pressure houses throughout New York State will provide greater local access to field training and field testing facilities needed to train and certify green jobs workers in support of GJGNY. Locations include: Northeast Parent and Child Society, Schenectady, NY; Green Jobs Training Center, Howard Beach, NY; Champlain Valley-Technical Education Center, Plattsburgh, NY; and SUNY Ulster, Stone Ridge, NY.

In June 2014, Northeast Parent and Child Society completed construction of their pressure house, received their certificate of occupancy, and has been hosting energy efficiency trainings and exams. Training is targeted to at-risk and low- to moderate-income young adults between the ages of 18 and 24 in addition to college students. A grand opening is scheduled for September 2014.

Training for Oilheat Industry Technicians

NYSERDA sought proposals to develop and deliver specific energy efficiency training. New education and training programs are needed to quickly improve the skills of professionals and tradespersons that are already active in the energy efficiency field, and to help prepare students and new employees for careers in the energy efficiency services sector. These education and training programs help to expand the workforce training infrastructure necessary to sufficiently support the labor supply needed to deploy energy efficiency programs.

Since the inception of the oilheat industry technician training project in 2012, a total of 715 oilheat technicians have received training to date. This year, Community Power Network (CPN) has continued to offer courses in energy efficiency/whole building science, combustion efficiency, advanced oil tank installation, and combustion air and venting. In addition, CPN has included an advanced class in oil burner and electrical module

installation/troubleshooting with hands-on practice for technicians, utilizing a portable NYSERDA-funded equipment trailer.

On-the-Job Training for Clean Energy

NYSERDA partners with businesses seeking incentives to hire and provide on-the-job training (OJT) for green workers. On-the-job training assists in developing a workforce equipped to implement energy efficiency, weatherization, green building principles, renewable energy and advanced technology system design and installation. This initiative is designed to advance the skills of new and existing workers, provide job-related experience, and connect new workers to employers.

NYSERDA has executed on-the-job training agreements with 42 businesses seeking to hire new employees or advance incumbent workers under GJGNY. As of June 30, 2014, 158 people have been hired from NYS Department of Labor's (NYSDOL) New York State Career Centers (formerly NYSDOL One Stop Centers) lists, and 13 incumbent workers have been advanced due to training. Approximately \$1.33M in wage and training subsidies has been awarded. The average wage of workers hired under the program is \$16.39 per hour.

NYSERDA recently added \$200,000 in GJGNY funding to the open enrollment solicitation for OJT incentives, Program Opportunity Notice (PON) 2033. The PON was also revised to better accommodate businesses that are growing by eliminating the per-business cap and reducing NYSERDA's share of the on-the-job training cost once a business has qualified for \$150,000 in funding.

Clean Energy Certification and Accreditation Incentives

NYSERDA provides partners with incentives to support training program accreditation, clean energy company accreditation, and individual certifications. The open enrollment Program Opportunity Notice (2397) Clean Energy Certification and Accreditation Incentives was recently expanded to include statewide incentives for the North American Board of Certified Energy Practitioners Photovoltaic and Solar Thermal certifications and Underwriters Laboratories Photovoltaic certifications.

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 statewide marketing initiatives, both print and electronic, 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 June 2014, CBOs are responsible for 3,930 completed assessments resulting in 1051 completed retrofits. Approximately 49 percent of those retrofits were for Assisted HPwES customers.

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.

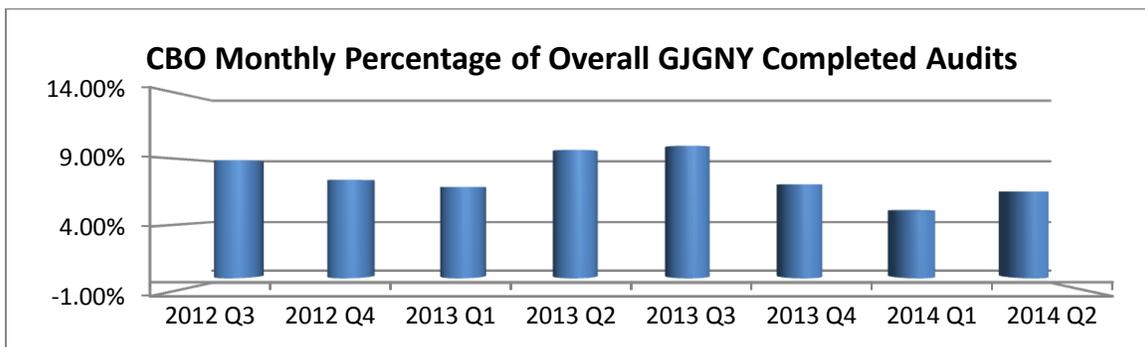
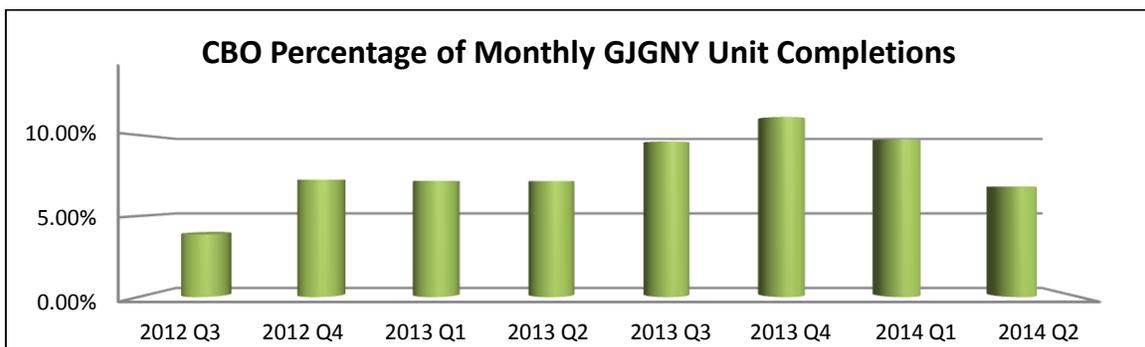


Figure 2-2. CBO Percentage of GJGNY Unit Completions.

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



Energy Champions Referral Program

In an effort to address the New York City market for Home Performance, an Energy Champions Referral Program was developed by the NYSERDA Outreach Program. Under the program, the four NYC-based CBOs (El Puente, Neighborhood Housing Services of Jamaica, Neighborhood Housing Services of Staten Island, and Sustainable South Bronx) will allow individuals to become “Energy Champions” and nonprofits to become “Energy Champion Partner Organizations” and refer homeowners into the Home Performance with ENERGY STAR® (HPwES) Program. Energy Champions as well as Partner Organizations will receive monetary as well as non-monetary benefits from the Home Performance Contractor for successfully recruiting homeowners who complete a retrofit.

Ten Home Performance contractors have signed partnership agreements for the Energy Champions Referral Program: AEA, Bright Homes, Brooklyn Green Homes Solutions, Drumriver Consultants, EnergyPro Insulation, Grant Engineering, Green Audit USA, Green Home Logic, NYS Energy Audits, and You Save Green. These ten contractors offer significant downstate coverage, serving the Bronx (6 contractors), Brooklyn (6 contractors), Staten Island (5 contractors), Queens (9 contractors), and Manhattan (3 contractors). A kick-off meeting is scheduled for the week of July 1, 2014. Staff is currently finalizing the Participation Agreements with the contractors. Work is also underway on outreach materials and the tracking systems needed to evaluate the pilot.

Outreach Service Day

The downstate CBOs worked with Envirolution on an Outreach Service Day on June 22, 2014. The service day involved door-to-door canvassing of residential customers for participation in the Home Performance Program. Twelve customers signed up for assessments as a result of Service Day outreach. Prior to the day, a training session was conducted on June 19, 2014 by Pratt Institute, a GJGNY implementation subcontractor under Conservation Services Group.

Community-based Organization Vetted Contractor List

Work is underway to update the CBO vetted lists of Home Performance contractors. The lists include contractors who have chosen to work with the CBOs in their respective territories. The full list is distributed to all customers interested in participating in the Home Performance program.

CBO Participation in Creating and Industry Working Group

CBOs participated in the Creating an Industry Working Group on June 13, 2014, where they were updated on the status of NYSERDA’s Early Wins for the Home Performance initiative. The Early Wins initiative worked with stakeholders to make significant improvements to HPwES program processes, with the goal of enabling customers to move from interest in the program to a signed contract within one week, a process that previously took several weeks. Changes are reflected in website and marketing materials, streamlining the Green Jobs-Green New York (GJGNY) assessment application and financial approval processes, improving contractor search functionality, and reducing contract approval times

Monthly CBO Webinar

The Monthly CBO webinar was held on June 26. Topics included

- Small Commercial Program Updates
- Community Investing Working Group updates – Mari Robinson, Long Island Progressive Coalition
- Pilot Program Overview – new “direct install” component of the GJGNY assessment
- Clarification of the CBO contract Performance Payment process and terms
- Update on Changes to Building Performance Institute Accreditation of Contractors
- Status of CBO Portal Enhancements
- CBO Highlights: Make the Road New York

2.2 Marketing Activities

Ongoing print marketing initiatives include the production and distribution of brochures and related promotional materials intended to expand the reach of the Green Jobs-Green New York Program. Ongoing electronic marketing initiatives include the initiation and 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

3.1 Home Performance with ENERGY STAR® Assessments

Through June 30, 2014, from the 68,564 approved assessment applications, 55,213 (81 percent) assessments have been completed. The conversion rate from assessment to HPwES project is 31.8 percent. The average cycle time between assessment completion and 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	GJGNY Totals since 11/15/10 ^a	
Received Assessment Applications			
June	99	1,539	
Program to Date	5,909	72,237	
Average # of Applications Received per Month	185	1,661	
Approved Assessment Applications			
Free			
June	129	1,532	
Program to Date	5,282	63,249	
Reduced Cost			
June	4	145	
Program to Date	307	5,315	
Total Approved Assessment Applications	5,589	68,564	
Average # of Applications Approved Per Month	175	1,576	
Scheduled Assessments			
Scheduled Assessments as of End of Current Month	371	3,456	
Completed Assessments			
Goal: (77,500-Assessments) Budget: (\$19,396,000)	Free		
	June	105	1,251
	Program to Date	3,712	51,183
	Reduced Cost		
	June	3	141
	Program to Date	218	4,129
Total Completed Assessments	3,930	55,312	
Assessment Funds Invoiced to Date		\$14,075,480	

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

3.2 Home Performance with ENERGY STAR® Projects

Of the 15,091 projects completed through HPwES resulting from a GJGNY audit and/or GJGNY financing, 10,391 (69 percent) units are associated with market rate customers and 4,700 (31 percent) units are associated with assisted customers.

In June 2014, there were 511 HPwES project completions. Of the 511 HPwES project completions, 468 (92 percent) were associated with a GJGNY assessment or loan. Thirty-five percent of the June GJGNY HPwES project completions were GJGNY Assisted HPwES customers.

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	1,094	15,149	NA
Completed Projects/Units^c			
Assisted			
June	13 / 16	163 / 167	182 / 187
Program to Date	427 / 515	4,700 / 4,997	7,978 / 8,377
Market Rate			
June	14 / 17	305 / 308	329 / 331
Program to Date	497 / 536	10,391 / 10,523	14,543 / 14,726
Total Completed Projects/Units (Project Goal: 25,000)	924 / 1051	15,091 / 15,520	22,521 / 23,103
^a Projects completed resulting from a GJGNY Assessment 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.

On February 3, 2014 NYSERDA launched GJGNY financing for residential solar photovoltaics (PV). Customers of Renewable Portfolio Standard-participating utilities can finance stand-alone PV projects, or combine solar PV with efficiency upgrades through HPwES. Plans to include PSEG-Long Island PV projects are being finalized.

Through June 2014, 94 PV contractors have completed registration with Energy Finance Solutions to provide their customers access to GJGNY financing. Meanwhile, 268 PV¹ OBR Loan applications have been received, of which 177 have been Pre-Approved, and 249 PV¹ Smart Energy Loan applications have been received, of which 205 have been Pre-Approved.

Of the 5,571 Residential GJGNY Loans closed to date, inclusive of all loan types, 28 percent are for Assisted HPwES customers, representing 21.6 percent of the total funds; while 72 percent are for Market Rate customers representing 78.4 percent of the total funds; 9.7 percent are Tier 2 customers, representing 9.4 percent of the total funds, while 90.3 percent are Tier 1 customers representing 90.6 percent of the funds. Of the loans closed for Assisted HPwES customers, 79.9 percent are Tier 1 loans, while 20.1 percent are Tier 2.

Since the launch of On-Bill Recovery, 32.9 percent of the Assisted HPwES customers who access financing use OBR Loans, while 38.9 percent of the Market Rate HPwES customers who access financing use OBR Loans; 33.4 percent of Tier 2 customers use OBR Loans while 37.6 percent of Tier 1 customers use OBR Loans.

¹ Indicates both stand-alone PV projects and combined solar PV with efficiency upgrades through HPwES.

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.

GJGNY Loan Type	Applications Received #	Applications Approved #	Loans Closed #	Loans Closed \$	Loans Awaiting Closing #	Loans Awaiting Closing \$
EE Smart Energy Loan	8,706	5,838	3,892	\$36,079,500	314	\$3,042,325
EE On-Bill Recovery Loan	5,878	3,438	1,673	\$17,998,113	235	\$2,916,925
Total	14,584	9,276	5,565	\$54,077,613	549	\$5,959,250
PV Smart Energy Loan	222	184	5	\$88,683	35	\$667,491
PV On-Bill Recovery Loan	197	138	1	\$15,820	16	\$252,874
Total	419	322	6	\$104,503	51	\$920,364
EE & PV Smart Energy Loan	27	21	0	\$0	3	\$25,520
EE & PV On-Bill Recovery Loan	71	39	0	\$0	5	\$58,160
Total	98	60	0	\$0	8	\$83,680
Grand Total	15,101	9,658	5,571	\$54,182,116	608	\$6,963,294

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
3,517	380	Loans Closed*	1,514	160
\$32,632,966	\$3,535,217	Value*	\$16,445,227	\$1,568,706
\$9,279	\$9,303	Average Loan*	\$10,862	\$9,804
12.5 Years	13.6 Years	Average Term*	14.5 Years	14.4 Years
N/A	N/A	2.99%	56.80%	55.00%
82.40%	80.00%	3.49%*	43.20%	45.00%
17.60%	20.00%	3.99%*	N/A	N/A
72.38%		Approval Rate**	67.89%	
20.23%		Denial Rate**	25.28%	
7.39%		Denied Tier 1, didn't pursue Tier 2**	6.84%	

* Refers to loans originated and closed by EFS (loan originator). The number and value of OBR Loans varies from Concord's (loan servicer) report due to timing issues and the treatment of successor loans.
 ** 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 and loans, by quarter.

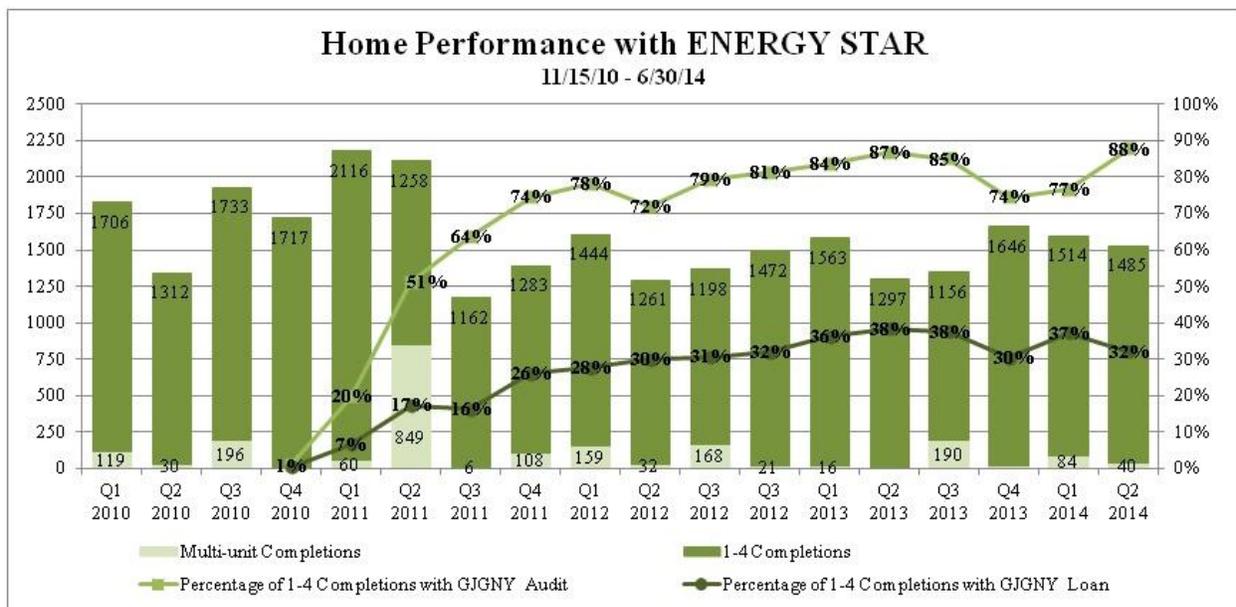


Figure 3-2. Green Jobs–Green New York Financing Applications Received, Quarterly.

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

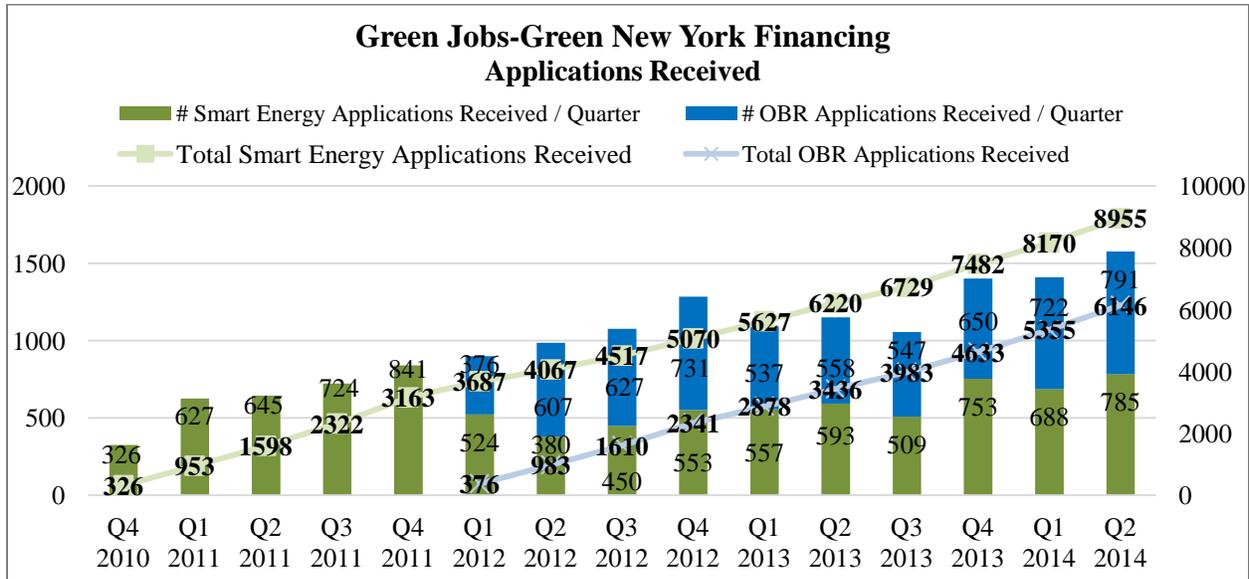


Figure 3-3. Green Jobs–Green New York Financing Loans Issued by Type, Quarterly.

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

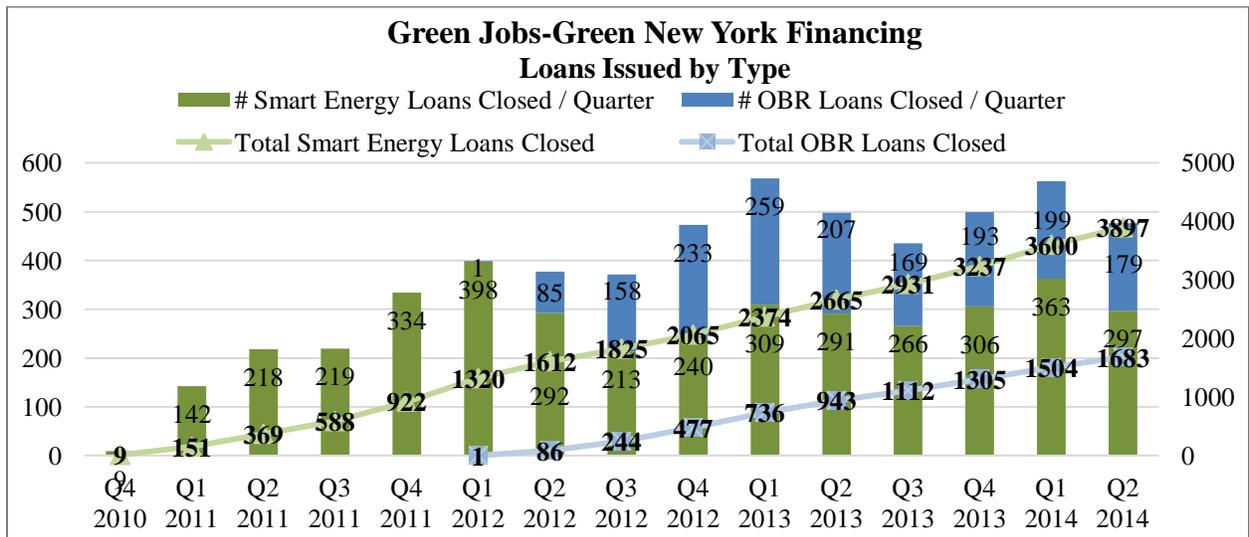


Figure 3-4. Green Jobs–Green New York Financing Loans Issued by Tier, Quarterly.

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

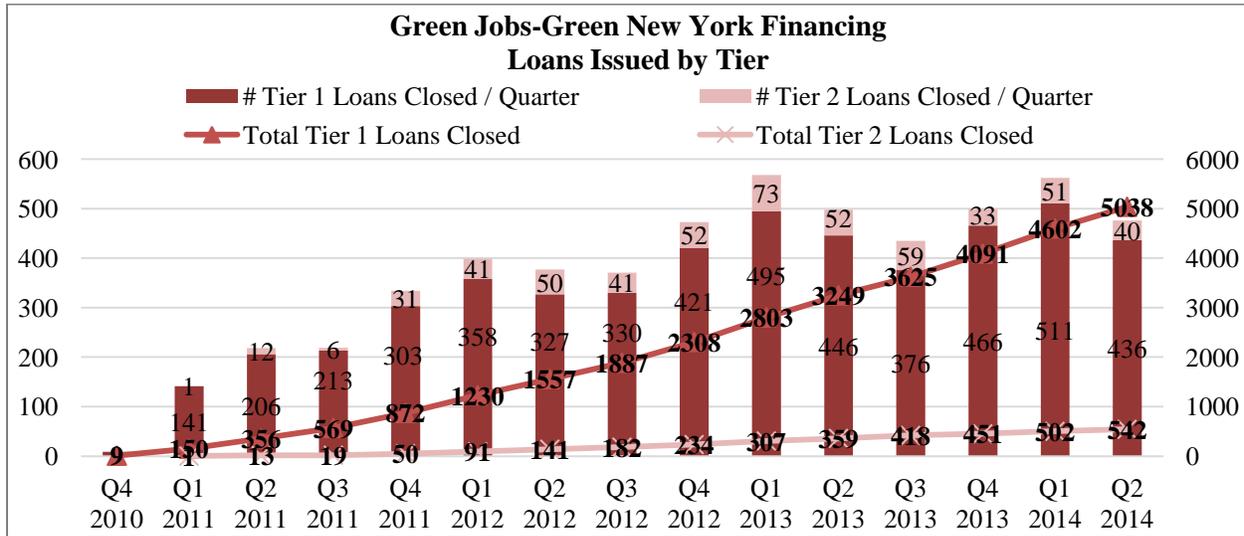


Figure 3-5. Green Jobs–Green New York Financing Loans Denied by Type, Quarterly.

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

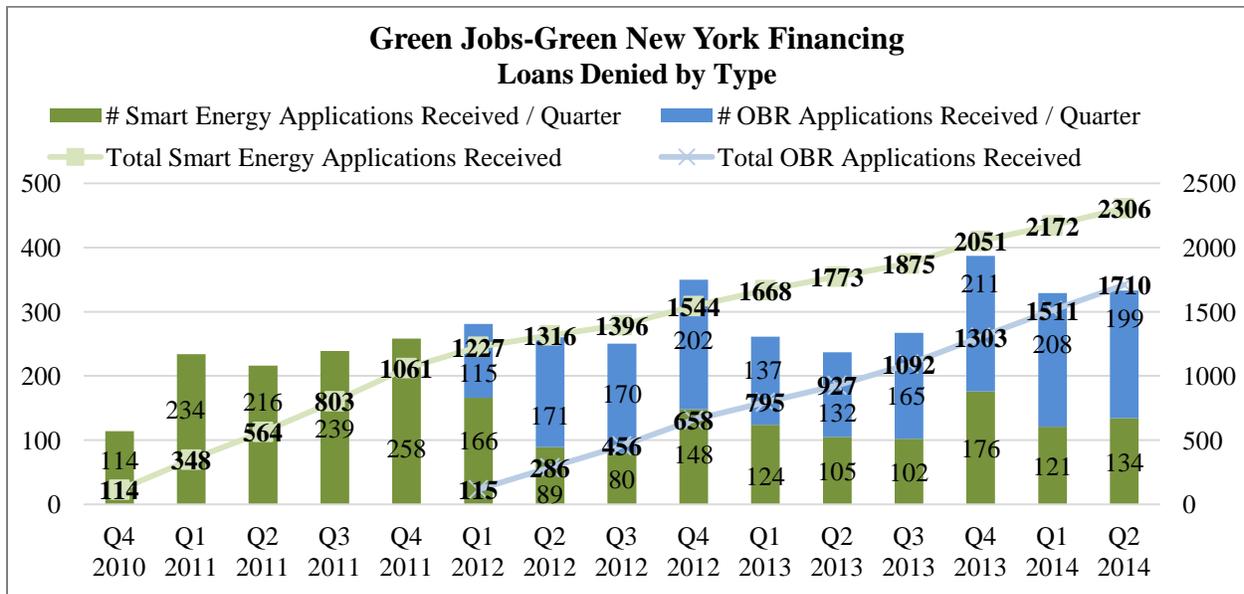


Figure 3-6. Green Jobs–Green New York Financing Loans Denied for Debt-to-Income Ratio, by Region.

Table 3-6 illustrates regional differentiation for received GJGNY loan applications and loan denial rates.

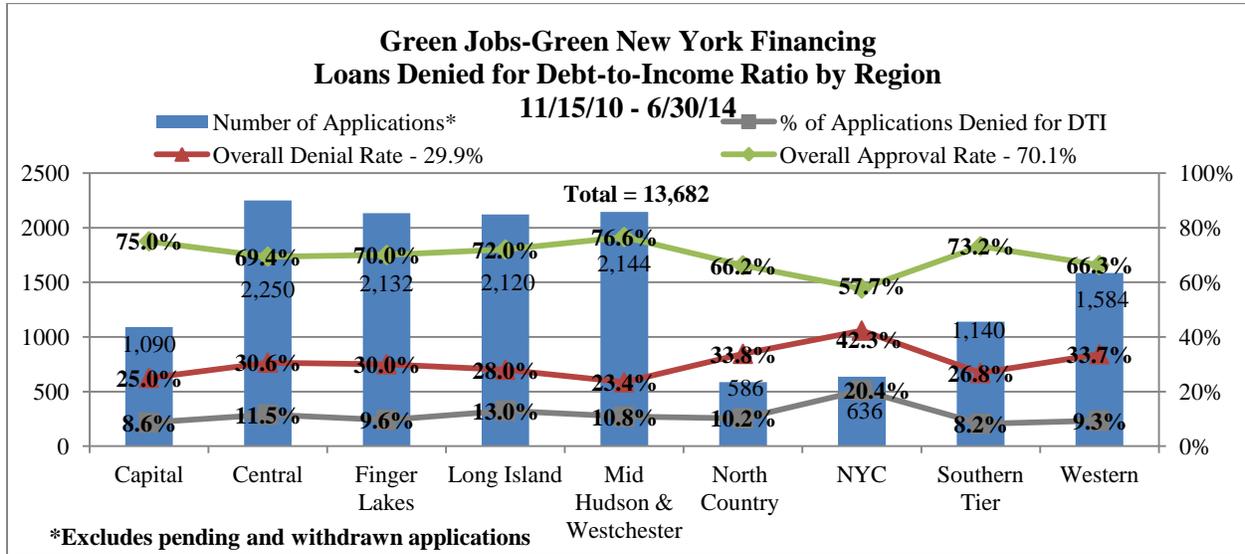
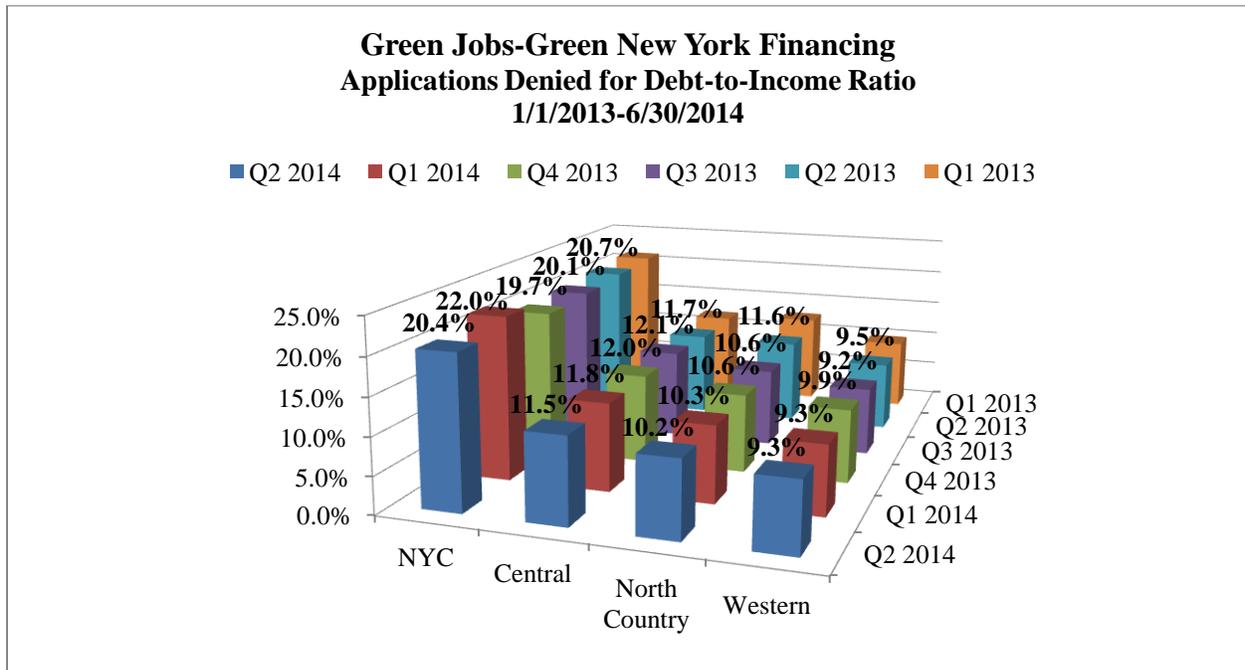


Figure 3-7. Green Jobs–Green New York Financing Loans Denied for Debt-to-Income Ratio, comparative by quarter.

Figure 3-7 illustrates comparative quarterly changes in the regions with the highest loan denials for debt-to-income ratio.²



² 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 June 2014, 45 loans were transferred from OBR to Smart Energy. Over the life of the program, 14.6 percent of pre-approved OBR loans were transferred to Smart Energy loans.

Smart Energy Loan Status	Cumulative Number of Loans
Pre-Approved	63
Loan Approved	66
Loan Sold	456
Loan Withdrawn	36
Loan Denied	6
No Loan - Subsidy Only	15
Total # Loans Transferred	642

4 Multifamily Performance Program

4.1 Multifamily Performance Assessments

Through June 30, 2014, from the 336 approved assessment applications, 296 (88 percent) assessments have been completed.

Table 4-1. Multifamily Performance Assessments.

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

Metric	June			Cumulative			
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total	Budget/Goal
Received Assessment Applications **	0	-1	-1	195	141	336	
Approved Assessment Applications **	0	-1	-1	195	141	336	500
Assessment Funds Encumbered ***	-\$560	-\$21,240	-\$21,800	\$2,350,810	\$1,127,707	\$3,478,517	
Assessment Funds Invoiced	\$0	\$0	\$0	\$1,259,450	\$587,030	\$1,846,480	\$3,000,000
Completed Assessments	4	4	8	164	132	296	400
Number of Projects withdrawing from MPP after assessment*	0	1	1	17	29	46	

*MPP Projects must achieve a minimum of 15% 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.
 **Changes in Received and Approved Assessment Application totals in June are due to a dropped project.
 ***Changes in Assessment Funds Encumbered in June are due to a payment made at a lower cost than initially projected and encumbered.

4.2 Multifamily Performance Projects

Through June 30, 2014, the Multifamily Performance Program has completed 19,381 housing units with installed measures. Of those units with installed measures, 7,861 (41 percent) are associated with market rate housing and 11,520 (59 percent) are associated with affordable housing.

Table 4-2. Multifamily Performance Projects.

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

Metric	June			Cumulative		
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total
Projects in Pipeline* ^a	0	-1	-1	195	141	336
Projects Contracted to have Measures Installed	8	29	37	194	141	335
Households Associated with Projects Contracted ^a	(3,634)	7,116	3,482	32,935	32,945	65,880
Projects with Installed Measures (units)	0	0	0	11,520	7,861	19,381
kWh Savings of Installed Measures**	0	0	0	13,833,688.6	2,510,975.2	16,344,664
MMBtu Savings of Installed Measures**	0	0	0	199,774.7	124,850.9	324,626
Dollar Savings of Installed Measures†	\$0	\$0	\$0	\$6,073,677.24	\$2,970,865.00	\$9,044,542.24

* 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.

^a Changes in Projects in Pipeline and Households Associated with Projects Contracted totals in June are due to a dropped project.

4.3 Multifamily Performance Financing

As of June 30, 2014, the Multifamily Performance Program has closed 14 loans with a total value of \$9,243,689. NYSERDA’s share of that total loan value is \$2,800,608.

Table 4-3. Multifamily Performance Financing.

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

Loan Status	June			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	14	\$2,800,608	\$9,243,688
Loans Closed	0	\$0.00	\$0.00	14	\$2,800,608	\$9,243,688

*Approved participation agreement values are inclusive of loans that have moved forward to closure.

5 Small Commercial Energy Efficiency Program

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 not-for-profit 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 June 30, 2014, the Small Commercial Energy Efficiency Program has received 3,282 assessment applications. Of those received applications, 2,947 (90 percent) have resulted in completed assessments.

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

Metric	June			Program Cumulative		
	GJGNY	ARRA*	Monthly Total	GJGNY	ARRA*	Program Total
Received Assessment Applications	28	0	28	2,348	934	3,282
Completed Assessments	31	0	31	2,098	849	2,947
*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 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

As of June 30, 2014, the Small Commercial Energy Efficiency Program estimates 589 project completions.

Table 5-2. Small Commercial Energy Efficiency Projects.

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

Metric	June	Program Cumulative
Estimated Projects Completed*	6	589
*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

As of June 30, 2014, the Small Commercial Energy Efficiency Program has closed 11 loans with a total value of \$577,225. NYSERDA’s share of that total loan value is \$300,883.

Table 5-3. Small Commercial Energy Efficiency Financing.

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

Loan Status	June			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	1	\$14,531	\$29,062	30	\$567,396	\$1,145,796
On-Bill Recovery	1	\$29,062	\$29,062	18	\$564,834	\$564,834
Loans Closed						
Participation Loans	0	\$0	\$0	9	\$237,563	\$513,905
On-Bill Recovery	0	\$0	\$0	2	\$63,320	\$63,320
Total	0	\$0	\$0	11	\$300,883	\$577,225
The Small Commercial Energy Efficiency Financing Program has 11 participating lenders.						
<p>* 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.</p> <p>**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.</p>						

6 Evaluation

6.1 Evaluation Activities Currently Underway

One evaluation is nearing completion. The process evaluation/market characterization and assessment (PE/MCA) evaluation of the Multifamily Performance Program is in the final stage of completion. This evaluation effort was leveraged to collect data to inform GJGNY and includes interviews with participating owners, managers, and developers regarding knowledge of GJGNY financing options and decision making. The results of this evaluation were presented to program staffs and feedback received was incorporated. The final report is under review. Staff will work toward having the final report available in July 2014.

Other evaluations are in early stages of planning or implementation. These studies are described below.

- The Home Performance with ENERGY STAR (HPwES) PE/MCA work plan, which includes the assessment of HPwES and CBO-related activities, is final. In addition, planning and coordination with the impact evaluation team is currently underway. Coordinating and combining these evaluations will limit the survey burden on HPwES participants and contractors. Data collection instruments are being developed with inputs from program and Department of Public Service staffs. The survey efforts are targeted to commence in July 2014.
- As part of the upcoming impact evaluation of the HPwES program, NYSERDA will include an assessment of the GJGNY assessment-only participant impacts resulting from homeowners who received a GJGNY assessment and did not pursue further program support through incentive programs. The HPwES impact evaluation work plan is in the final stages of review and approval. The impact evaluation of this program aligns and will be coordinated with the process/market and impact evaluation described above. Coordination of evaluation efforts will limit the survey burden on HPwES contractors and GJGNY assessment-only participants. Survey development is currently underway and data collection efforts are targeted to commence in July 2014.
- NYSERDA is planning an impact evaluation of the Small Commercial Energy Efficiency Program that will focus on quantifying the measure adoption rate over time, the degree of program influence on the participant decision making and the proportion of installed measures for which customers accessed other NYSERDA funding. The work plan for the evaluation effort is nearly complete and evaluation activities are planned to commence in early July 2014.