

New York State Energy Research and Development Authority

## Green Jobs – Green New York January 2015 Monthly Update

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Period ending January 31, 2015

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## Program Description

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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

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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 January 2015, NYSERDA’s GJGNY training partners have trained more than 2,700 individuals in courses including solar thermal installation, introductory photovoltaic training, advanced air sealing, pressure diagnostics, 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 supported more than 40 individuals in earning 72 BPI certifications—many of whom completed field testing at NYSERDA-sponsored pressure houses across the state. Most GJGNY training agreements have concluded or are drawing to a close. Some will continue through 2015 including Community Power Network offering its popular oil heat technician training with two more courses to be scheduled this spring.

### **On-the-Job Training for Clean Energy**

From June 2011 through December 2014, NYSERDA partnered with 59 businesses who hired a total of 263 New Yorkers for technical jobs in the energy efficiency and renewable energy fields under GJGNY; the average wage was \$16.99 per hour. The full budgeted amount of \$1,700,000 was expended.

The on-the-job training (OJT) initiative advanced the clean energy skills of new workers, provided valuable job-related experience, and connected new workers to employers. The program also supported businesses in developing a more structured approach to OJT and, as a result, many businesses attest that they were able to promote their existing staff to more advanced positions and experienced a higher rate of employee retention.

The program is expected to re-open in February 2015 using SBC funds to support new hires in emerging and underutilized technology areas including solar thermal, biomass, and air and ground-sourced heat pumps. Program staff will continue to assess labor needs in the market and may add limited GJGNY funds as specific gaps are identified.

## 2 Outreach and Marketing

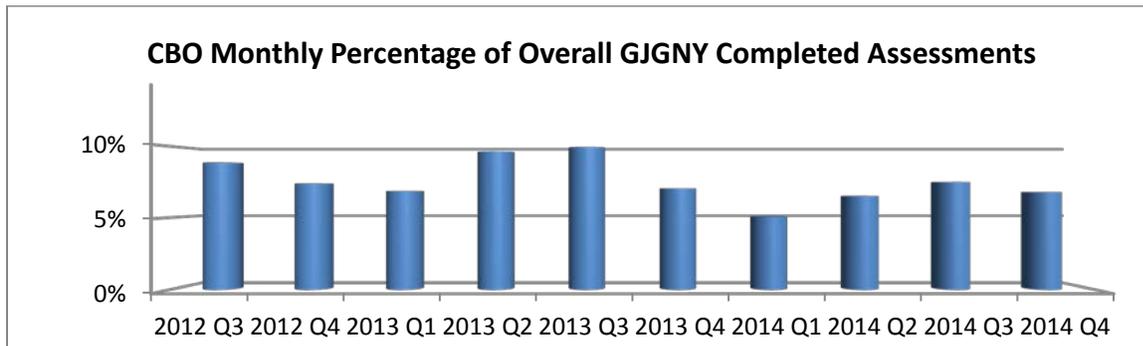
GJGNY Outreach and Marketing provides for community-based outreach, enabling one-on-one assistance with the process of participating in the GJGNY Program. This, combined with both print and electronic statewide marketing initiatives, increases the reach of the program, particularly among disadvantaged 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 January 2015, CBOs are responsible for 4,842 completed assessments resulting in 1,418 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.

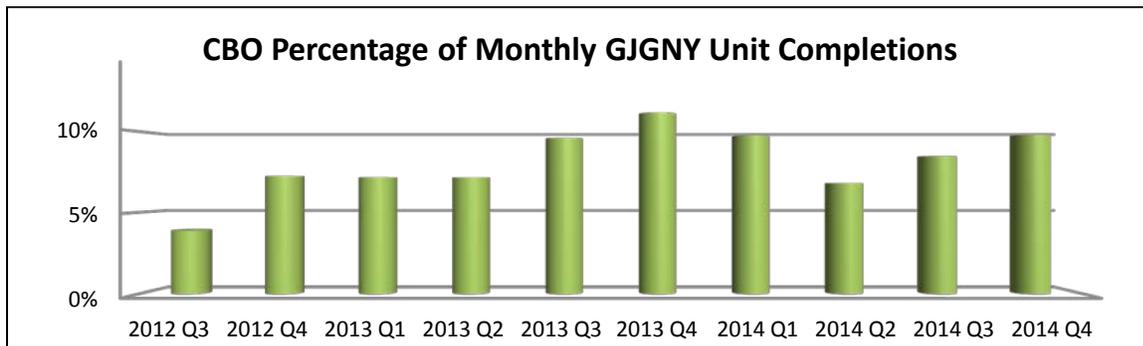
**Figure 2-1. CBO Percentage of GJGNY Completed Assessments.**

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.



### **New CBO Staff Training**

Training for new CBO staff was held in New York City on January 16, 2015 for the many new CBO staffers in the downstate region. Attendees were instructed on existing processes and procedures, including the use of report templates, the CBO SharePoint website and portal, and other administrative policies.

### **Meeting with Rural Ulster Preservation Company**

A meeting with Rural Ulster Preservation Company (RUPCO) was held on January 21, 2015. Attendees discussed collaboration with Catskill Mountainkeepers Cleaner Greener Solarize Program in addition to RUPCO's Save Energy Campaign, which is an outreach program. Updates were given on the Central Hudson Fuel Conversion Campaign.

### **Downstate CBO Meeting**

A downstate CBO meeting was held at the Pratt Institute on January 15, 2015. Topics included:

- Energy Champions referral program check-in: Attendees brainstormed about best way for growing the Energy Champions network in addition to discussing successes, roadblocks.
- Updates were provided on recent changes to the Green Jobs-Green New York financing programs, the revised NYSERDA logo, marketing materials, Green Jobs Training Center classes, outreach service days, and current ongoing projects.
- Troubleshooting customer or contractor concerns.

### **Monthly CBO Webinar**

A CBO webinar was held on January 22, 2015. Topics included:

- Solarize and Community Solar: History and Current Incentives and Financing - Elana Bulman, Solar One
- Overview of HPwES Energy Modeling Software – Julie Caracino, NYSERDA
- Energy Champions Referral Program Update – Kristen Chin, Pratt
- Residential Program updates including information on the Clean Energy Fund, the revised NYSERDA website, and Multifamily Performance Program financing.

## **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 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

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NYSERDA's Home Performance with ENERGY STAR® (HPwES) program offers homeowners in New York State a comprehensive, whole-house 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 January 2015, from the 86,166 approved assessment applications, 66,399 (77 percent) assessments have been completed.

In the month of January, 2,730 free/reduced-cost comprehensive home energy assessment applications were received. The conversion rate from assessment to energy retrofit is 32 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 <sup>a</sup>	GJGNY Totals since 11/15/10 <sup>b</sup>	
<b>Received Audit Applications</b>			
January	183	2,730	
Program to Date	7,825	90,541	
<b>Average # of Applications Received per Month</b>	<b>201</b>	<b>1,793</b>	
<b>Approved Audit Applications</b>			
Free			
January	204	2,453	
Program to Date	7,105	79,628	
Reduced Cost			
January	13	202	
Program to Date	384	6,538	
<b>Total Approved Audit Applications</b>	<b>7,489</b>	<b>86,166</b>	
<b>Average # of Applications Approved Per Month</b>	<b>192</b>	<b>1,706</b>	
<b>Scheduled Audits</b>			
<b>Scheduled Audits as of End of Current Month</b>	<b>92</b>	<b>4,941</b>	
<b>Completed Audits</b>			
Goal: (77,500-Audits)	Free		
	Month	110	1,352
	Program to Date	4,580	61,519
	Reduced Cost		
	Month	6	113
	Program to Date	262	4,880
<b>Total Completed Audits</b>	<b>4,842</b>	<b>66,399</b>	
<b>Audit Funds Invoiced to Date</b>		<b>\$16,856,390</b>	

<sup>a</sup> Round 2 CBO production as of 6/1/2012.

<sup>b</sup> GJGNY totals since 11/15/10 are inclusive of CBO initiated activities.

### 3.2 Home Performance with ENERGY STAR® Projects

Of the 18,456 projects completed through HPwES resulting from a GJGNY assessment and/or GJGNY financing, 5,819 (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 January 2015, there were 581 HPwES project completions. Of the 581 HPwES project completions, 531 (91 percent) were associated with a GJGNY assessment or loan. Thirty-four percent of the January GJGNY HPwES project completions were for income-qualified customers who have a household income of up to 80 percent of the county median income.

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

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

#### One- to Four Family Residential Buildings Home Performance with ENERGY STAR® Projects

Timeframe	CBO Initiated since 11/1/11	GJGNY Totals since 11/15/10 <sup>a</sup>	HPwES Totals since 11/15/10 <sup>b</sup>
<b>Projects Contracted</b>			
To Date	1,489	18,818	NA
<b>Completed Projects/Units<sup>c</sup></b>			
<b>Assisted</b>			
January	23 / 28	157 / 167	183 / 195
Program to Date	608 / 723	5,819 / 6,613	9,388 / 9,842
<b>Market Rate</b>			
January	20 / 23	374 / 377	398 / 402
Program to Date	642 / 695	12,637 / 12,788	16,694 / 17,168
<b>Total Completed Projects/Units (Project Goal: 25,000)</b>	<b>1,250 / 1,418</b>	<b>18,456 / 18,951</b>	<b>26,082 / 27,010</b>
<sup>a</sup> Projects completed resulting from a GJGNY Audit and/or GJGNY Financing. <sup>b</sup> Total HPwES including GJGNY Projects. <sup>c</sup> 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.

NYSERDA announced a new process for submitting work scopes to the Home Performance with ENERGY STAR Program in October 2014. Since its launch, approval times on projects using the new process are averaging less than one business day and the Program has received a significant increase in project submissions. The web-based work scope submission and approval process allows contractors to receive immediate feedback regarding the incentive and financing eligibility of the project before submitting the project for approval on-line. Effective January 1, 2015, all projects submitted to the Program will follow the new work scope submission process using the NY HP Portal.

Of the 7,285 Residential GJGNY Loans closed to date, 27.0 percent are for Assisted HPwES customers, representing 19.8 percent of the total funds; while 73.0 percent are for Market Rate customers representing 80.2 percent of the total funds; 10.7 percent are Tier 2 customers, representing 10.3 percent of the total funds, while 89.3 percent are Tier 1 customers representing 89.7 percent of the funds. Of the loans closed for Assisted HPwES customers, 78.7percent are Tier 1 loans, while 21.3 percent are Tier 2.

Since the launch of On-Bill Recovery, 32.1 percent of the Assisted HPwES customers who access financing use OBR Loans, while 39.1 percent of the Market Rate HPwES customers who access financing use OBR Loans; 32.9 percent of Tier 2 customers use OBR Loans while 37.7 percent of Tier 1 customers use OBR Loans.

**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.

<b>GJGNY Loan Type</b>	<b>Applications Received (number)</b>	<b>Applications Approved (number)</b>	<b>Loans Closed (number)</b>	<b>Loans Closed (dollars)</b>	<b>Loans Awaiting Closing (dollars)</b>	<b>Loans Awaiting Closing (dollars)</b>
EE Smart Energy Loan	10,762	7,459	4,771	\$44,826,150	641	\$6,622,857
EE On-Bill Recovery Loan	7,333	4,326	2,182	\$24,032,435	290	\$3,934,737
Total	18,095	11,785	6,953	\$68,858,585	931	\$10,557,594
PV Smart Energy Loan	922	803	199	\$3,465,138	303	\$5,042,471
PV On-Bill Recovery Loan	1,348	1,046	131	\$2,265,639	340	\$5,633,823
Total	2,270	1,849	330	\$5,730,777	643	\$10,676,293
EE & PV Smart Energy Loan	38	24	2	\$31,392	2	\$26,651
EE & PV On-Bill Recovery Loan	139	64	0	\$0	4	\$81,467
Total	177	88	2	\$31,392	6	\$108,118
<b>Grand Total</b>	<b>20,542</b>	<b>13,722</b>	<b>7,285</b>	<b>\$74,620,754</b>	<b>1,580</b>	<b>\$21,342,005</b>

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

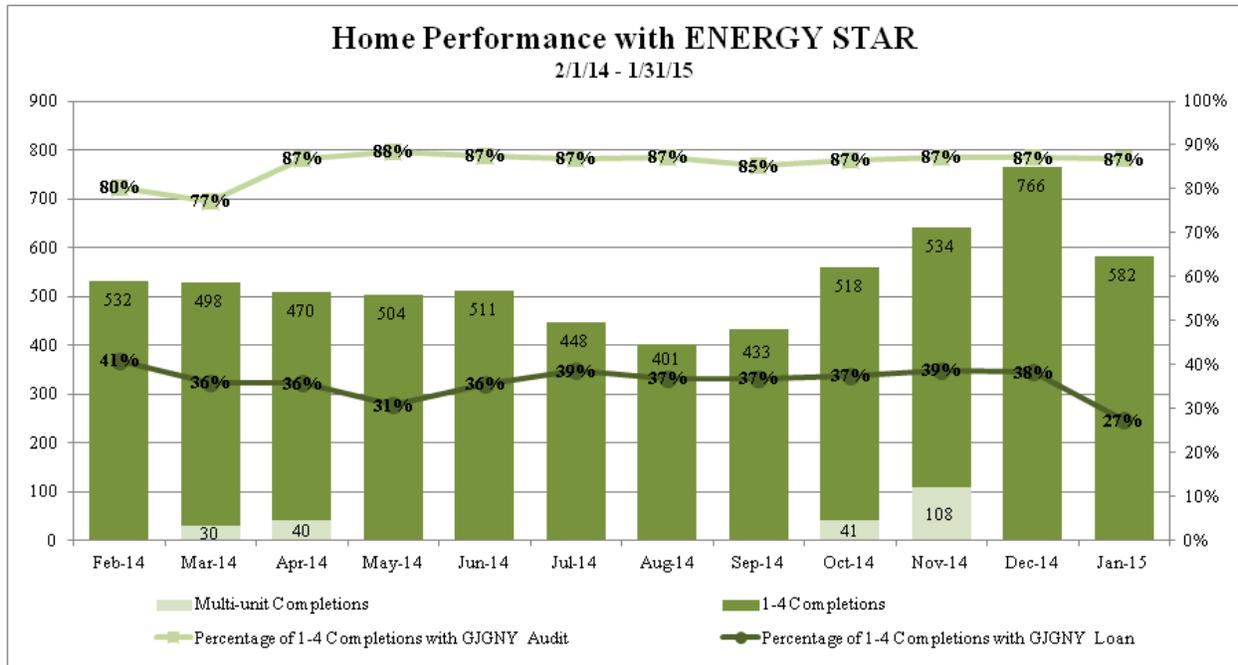
Table 3-4 provides a cumulative summary of Smart Energy Loan and On-Bill Recovery Loan activity.

Smart Energy		Financing Summary	On-Bill Recovery	
Tier 1	Tier 2		Tier 1	Tier 2
4,430	542	Loans Closed	2,077	236
\$43,210,782	\$5,111,899	Value	\$23,727,568	\$2,570,506
\$9,754	\$9,432	Average Loan	\$11,424	\$10,892
12.7 Years	13.7 Years	Average Term	14.6 Years	14.5 Years
N/A	N/A	2.99%	38.66%	38.98%
82.30%	80.07%	3.49%	61.34%	61.02%
17.70%	19.93%	3.99%	N/A	N/A
75.56%		Approval Rate*	72.56%	
18.31%		Denial Rate*	21.92%	
6.13%		Denied Tier 1, didn't pursue Tier 2*	5.53%	

\* Does not include applications pending review or withdrawn.

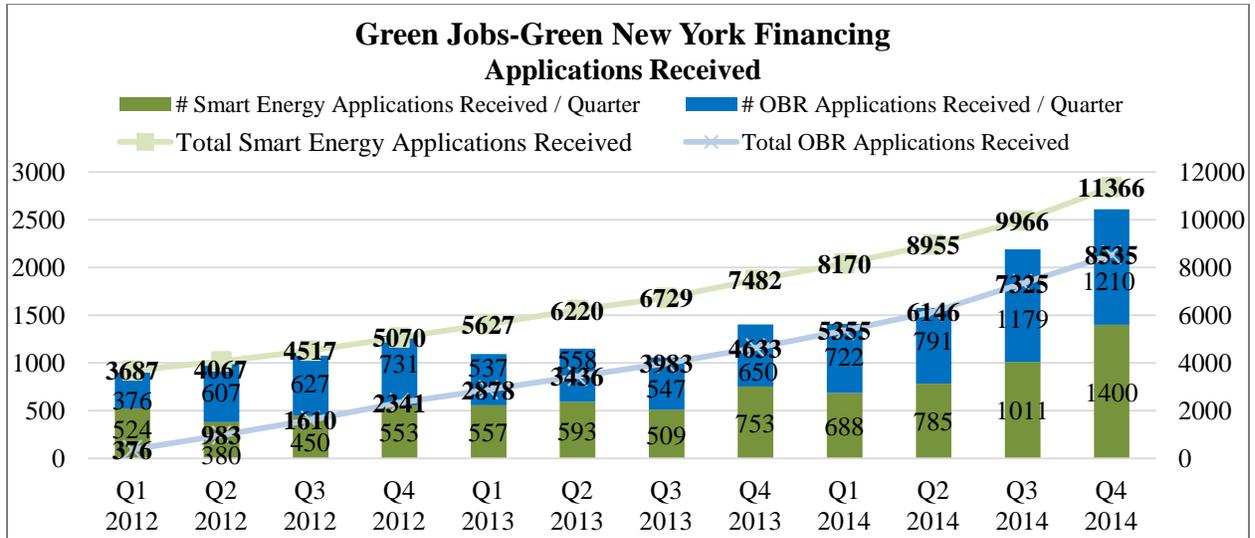
**Figure 3-1. Home Performance with ENERGY STAR Completions, Quarterly.**

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



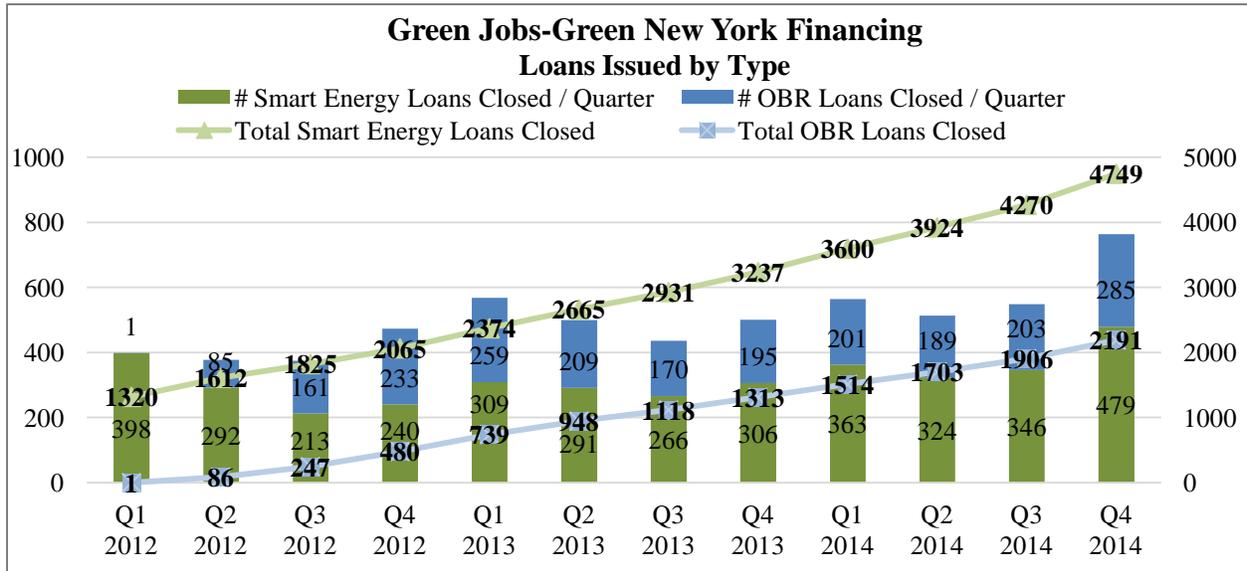
**Figure 3-2. Green Jobs–Green New York Financing Applications Received, Quarterly.**

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



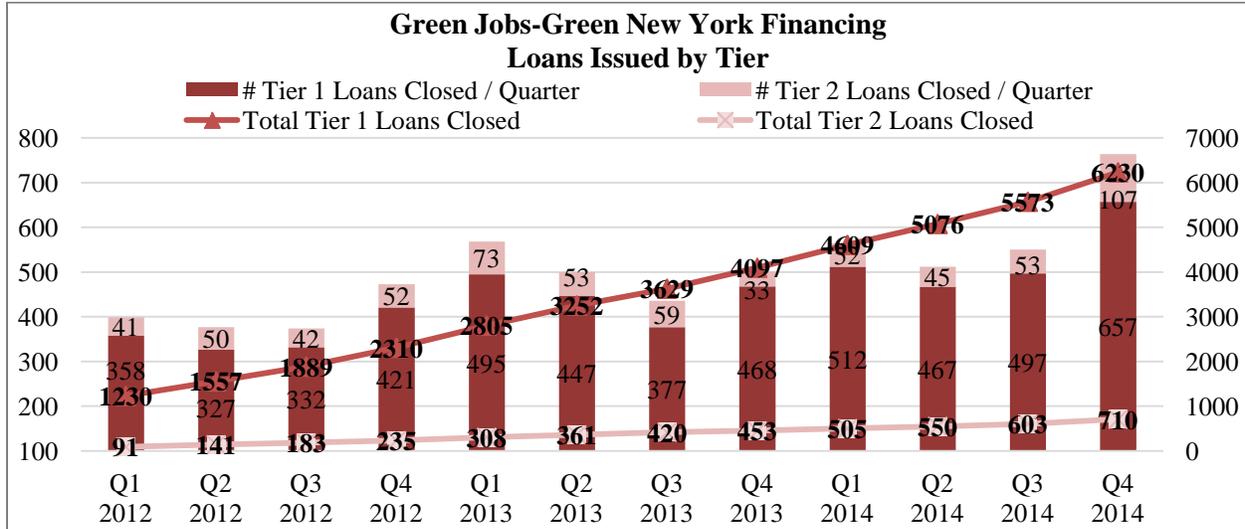
**Figure 3-3. Green Jobs–Green New York Financing Loans Issued by Type, Quarterly.**

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



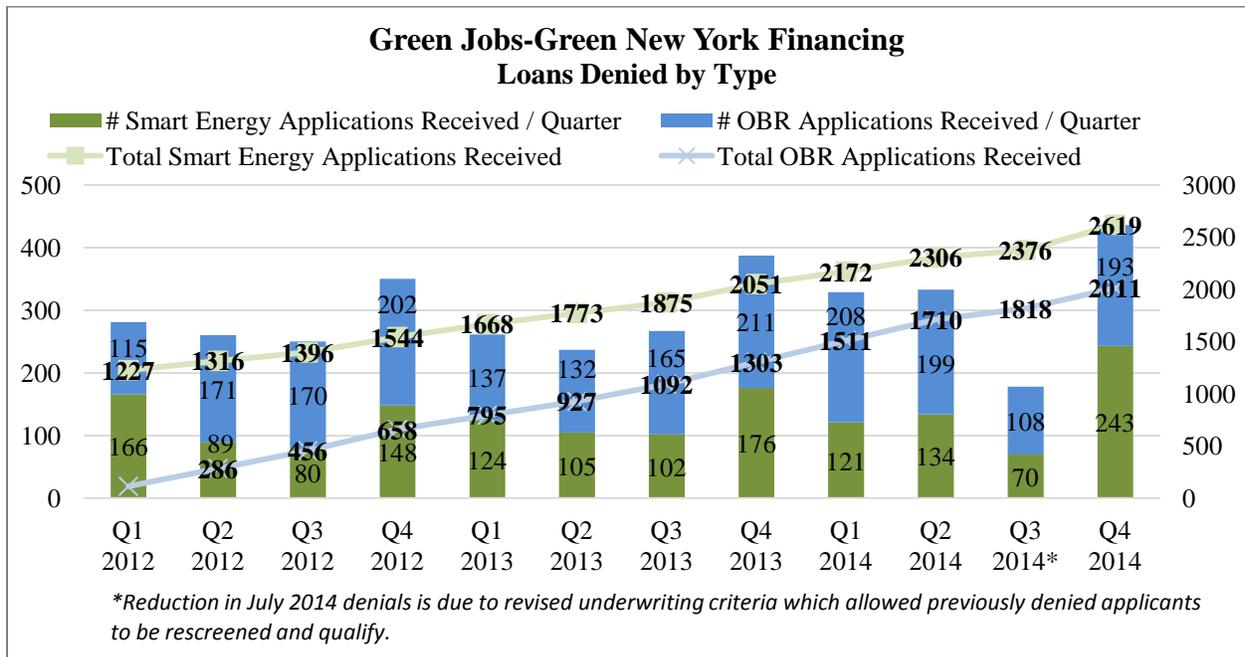
**Figure 3-4. Green Jobs–Green New York Financing Loans Issued by Tier, Quarterly.**

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



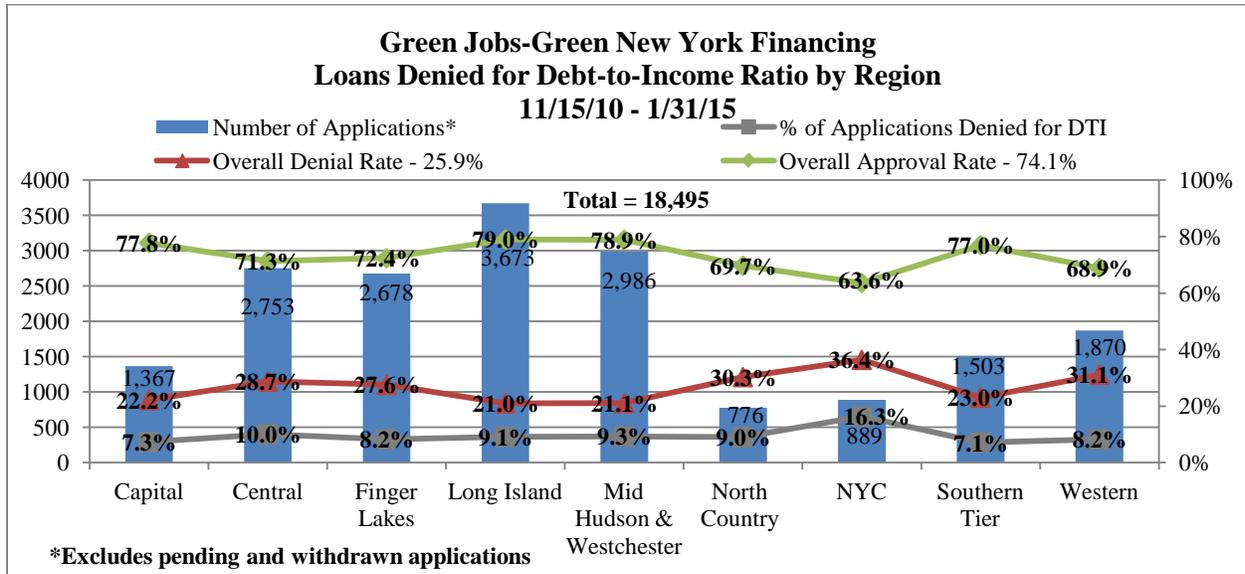
**Figure 3-5. Green Jobs–Green New York Financing Loans Denied by Type, Quarterly.**

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



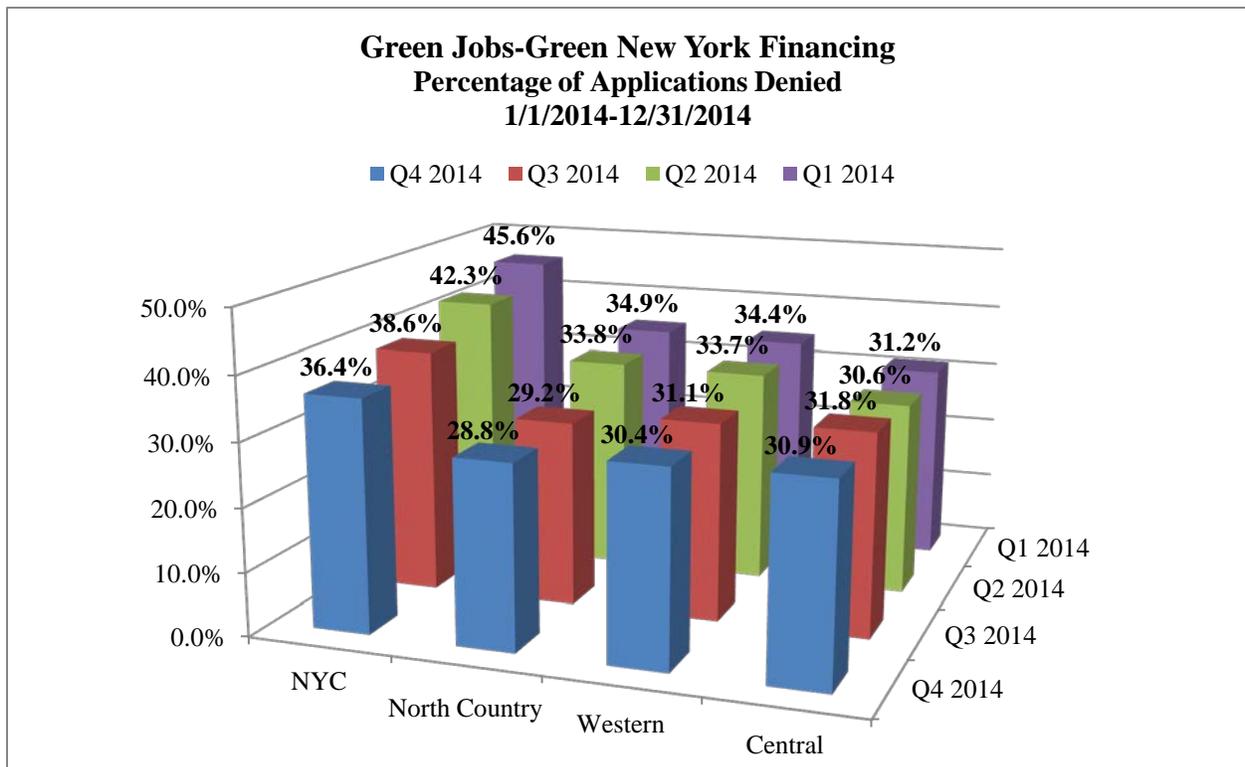
**Figure 3-6. Green Jobs–Green New York Financing Loans Denied for Debt-to-Income Ratio, by Region.**

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



**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 January 2015, 57 loans were transferred from OBR to Smart Energy. Over the life of the program, 15.9 percent of pre-approved OBR loans were transferred to Smart Energy loans.

<b>Smart Energy Loan Status</b>	<b>Cumulative Number of Loans</b>
Pre-Approved	84
Loan Approved	135
Loan Sold	725
Loan Withdrawn	76
Loan Denied	12
No Loan - Subsidy Only	36
<b>Total Number of Loans Transferred</b>	<b>1068</b>

## 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 January 2015, from the 335 approved assessment applications, 313 (93 percent) assessments have been completed.

**Table 4-1. Multifamily Energy Performance Assessments.**

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

Metric	January			Cumulative			
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total	Budget/ Goal
Received Assessment Applications	0	0	0	194	141	335	
Approved Assessment Applications	0	0	0	194	141	335	500
Assessment Funds Encumbered (\$)	-25,275	0	-25,275	2,336,210	1,123,190	3,459,400	
Assessment Funds Invoiced (\$)	0	0	0	2,240,420	1,090,227	3,330,647	3,000,000
Completed Assessments	0	0	0	175	138	313	400
Number of Projects Withdrawing from MPP after Assessment*	13	-19	-6	35	19	54	

\*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.  
 NOTE: Decreases reported in assessment funds encumbered are due to project attribution.  
 NOTE: Decreases reported in Number of Projects Withdrawing from MPP after Assessment are due to previous reporting errors.

## 4.2 Multifamily Energy Performance Projects

Through January 2015, the Multifamily Energy Performance Program has completed 30,104 housing units with installed measures. Of those units with installed measures, 16,451 (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	January			Cumulative		
	Affordable Housing	Market Rate Housing	Monthly Total	Affordable Housing	Market Rate Housing	Program Total
Projects in Pipeline*	0	0	0	194	141	335**
Projects Contracted to have Measures Installed	0	0	0	194	140	334
Households Associated with Projects Contracted	0	0	0	32,911	32,945	65,856
Projects with Installed Measures (units)	264	0	264	16,715	13,653	30,368
kWh Savings of Installed Measures	501,696	25,011	526,707	27,449,214.5	6,659,779.5	34,108,994
MMBtu Savings of Installed Measures	7,100	-597	6,503	295,469.1	241,117.7	536,587
Dollar Savings of Installed Measures	\$115,972	(\$9,002)	\$106,970	\$10,082,141.24	\$6,186,776.00	\$16,268,917.24
<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>						

### 4.3 Multifamily Energy Performance Financing

As of January 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	January			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	\$4,745,999	\$10,416,508
Loans Closed*	0	\$0.00	\$0.00	16	\$3,289,451	\$10,416,508

\* Negative loan total is due to a project dropping out for which funding was fully encumbered.

## 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 January 2015, the Small Commercial Energy Efficiency Program has received 3,518 assessment applications. Of those received applications, 3,201 (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	January			Program Cumulative		
	GJGNY	ARRA*	Monthly Total	GJGNY	ARRA*	Program Total
Received Assessment Applications	36	0	36	2,584	934	3,518
Completed Assessments	38	0	38	2,352	849	3,201

\*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 January 2015, the Small Commercial Energy Efficiency Program estimates 640 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	January	GJGNY Program Cumulative
<b>Estimated Projects Completed*</b>	8	640
*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 January 2015, the Small Commercial Energy Efficiency Program has closed 14 loans with a total value of \$630,899. NYSERDA’s share of that total loan value is \$354,557.

**Table 5-3. Small Commercial Energy Efficiency Financing.**

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

Loan Status	January			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	3	\$105,730	\$325,383	50	\$1,161,864	\$2,502,263
On-Bill Recovery	0	\$0	\$0	27	\$826,505	\$1,095,665
Loans Closed						
Participation Loans	0	\$0	\$0	9	\$237,563	\$513,905
On-Bill Recovery	0	\$0	\$0	5	\$116,994	\$116,994
<b>Total**</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>14</b>	<b>\$354,557</b>	<b>\$630,899</b>
The Small Commercial Energy Efficiency Financing Program has 11 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.						
NOTE: The number of approved participation loan for January includes a loan approved in May 2014 that was recently added to the financing database.						

## 6 Evaluation

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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.

- A study on Home Performance with ENERGY STAR (HPwES) addressing process evaluation, market characterization, an analysis of CBOs, and impact evaluation-related research objectives is underway. A telephone and web-based survey of participants commenced in January 2015. NYSERDA is working to make the preliminary results of this evaluation available in mid-2015.
- An assessment of the GJGNY assessment-only participant impacts resulting from homeowners who received a GJGNY assessment and did not pursue further support through incentive programs is currently underway. Data collection is complete and analysis continues. NYSERDA will work toward having the preliminary results of this evaluation available late February 2015.
- An impact evaluation of the Small Commercial Energy Efficiency Program will quantify measure adoption rate over time, assess the degree of program influence on the participant decision making, and the proportion of installed measures for which customers accessed other NYSERDA funding. Data collection continues. NYSERDA will work toward having the preliminary results of this evaluation in mid-2015.