

# NYSERDA

## Combined Narrative Report

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Section IV Narratives - EEPS Reports</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>Residential: Peggie Neville // Comm.: Peter Savio</b>

1. RESIDENTIAL (9)..... Pages 01- 21
2. COMMERCIAL/INDUSTRIAL ..... Pages 22-35

### Section IV. Narrative Report to be included with spreadsheet

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Assisted Home Performance with ENERGY STAR®</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>James Reis</b>

#### 1. Program Status

Although higher production numbers were reported in August, the Assisted Home Performance with ENERGY STAR® Program has seen a recent decline in production. Compared to this time last year, production in the Assisted Home Performance Program is down nearly 20% in 2010. Contractors report that many people are waiting for the implementation of Green Jobs-Green NY and the possible federal HomeStar program before proceeding to determine if better incentives are available from those programs. Additionally, there has been an increase in the number of financing applications declined during 2010, impacting the ability of work to move forward. NYSERDA anticipates launching Green Jobs Green New York financing in October, which is anticipated to help mitigate the number of financing applications currently being denied.

#### 2. Program Implementation Activities

- (a) **Marketing Activities** – NYSERDA received DPS approval on the Marketing and Outreach Plan in July. NYSERDA is undertaking the internal processes required to modify existing marketing contracts to add EEPS funding.

Note – the estimated contacts number in the table below represents estimated attendance at the event and does not necessarily represent the number of individuals receiving information on the program.

<b>Start Date</b>	<b>End Date</b>	<b>Event Title</b>	<b>City</b>	<b>Estimated Contacts</b>
07/30/10	08/07/10	Schoharie Co Sunshine Fair	Cobleskill	900
08/01/10	08/01/10	Asian Am. for Equality (AAFE) Chinatown Summer St Festival 2010	New York	150
08/05/10	08/08/10	Chemung County Fair	Horseheads	200
08/06/10	08/06/10	Going Green Night with the Buffalo Bisons!	Buffalo	60
08/07/10	08/15/10	Rediscovering Our Agricultural Roots at the Franklin County Fair	Malone	700
08/07/10	08/07/10	Warren County Youth Fair	Warrensburg	100
08/07/10	08/07/10	African American Family Day (AAFD) 2010	Albany	50
08/09/10	08/14/10	Bring a Friend in 2010 - Wayne County Fair	Palmyra	200
08/10/10	08/10/10	Home Perf w/ ENERGY STAR® Residential Contractor Orientation	Malta	50
08/10/10	08/12/10	Empire Farm Days	Seneca Falls	100
08/10/10	08/15/10	Chenango County Fair	Norwich	400
08/11/10	08/13/10	SimBuild 2010	New York	150
08/11/10	08/11/10	Yes, Your Old House Can Be Energy Efficient - Dobbs Ferry	Dobbs Ferry	50
08/11/10	08/15/10	The 162nd Essex County Fair	Westport	250
08/11/10	08/22/10	Erie County Fair	Hamburg	400
08/12/10	08/12/10	17th Annual Competitive Edge Event	New York	200
08/13/10	08/15/10	131st Little World's Fair - The Grahamsville Little World's Fair	Grahamsville	200
08/14/10	08/14/10	The Brooklyn Comm & Youth Assoc. (BCYN) Annual Festival St. Fair	Brooklyn	50
08/14/10	08/22/10	Homerama 2010	Penfield	300
08/14/10	08/21/10	Wyoming County Fair (Pike Fair)	Pike	250
08/16/10	08/21/10	Delaware County Fair	Walton	250
08/17/10	08/22/10	191th Steuben County Fair	Bath	300
08/17/10	08/22/10	Altamont Fair	Altamont	100
08/21/10	08/21/10	State Farm Cultural Arts Festival	Amsterdam	25
08/23/10	08/29/10	An Agric. Tradition for Over a Century the Washington Co. Fair	Greenwich	250
08/23/10	08/23/10	Going Green Night with the Hudson Valley Renegades	Wappingers Falls	50
08/24/10	08/29/10	Dutchess County Fair	Rhinebeck	270
08/26/10	09/06/10	The Great 2010 New York State Fair	Syracuse	
08/28/10	08/28/10	24th Annual Margaretville Street Fair	Margaretville	40
08/28/10	08/28/10	Joe Smith	Amsterdam	20
08/31/10	09/06/10	Fonda Fair - Our 169th Year!	Fonda	250
<b>Upcoming Events</b>				
09/01/10	09/06/10	Columbia County Fair	Chatham	270
09/11/10	09/11/10	Back to School Expo	Albany	80

09/11/10	09/11/10	Earth Circus at HOWL Festival of East Village Arts	New York	50
09/11/10	09/11/10	Malta Business and Professional Assoc. Inaugural 5K	Malta	35
09/15/10	09/15/10	Home Perf. w/ ENERGY STAR® Residential Contractor Orientation	Johnstown	20
09/15/10	09/15/10	Energy Efficiency / Heat Smart	New York	25
09/16/10	09/16/10	Home Perf. w/ ENERGY STAR® Residential Contractor Orientation	Troy	20
09/17/10	09/17/10	Montgomery Co. Office for Aging Annual County-Wide Sr. Picnic	Fonda	35
09/23/10	09/23/10	Make Every Day Earth Day	Clifton Park	120
09/25/10	09/25/10	Wildlife Festival and Energy Expo 2010	North Blenheim	50
09/25/10	09/25/10	8th Annual Cauliflower Festival	Margaretville	23
09/25/10	09/25/10	New Castle Community Day 2010	Chappaqua	50
09/29/10	10/02/10	39th Annual NA Assoc. for Environmental Ed. Conf (NAAEE)	Buffalo	45
09/29/10	09/29/10	NYESH Builders Meeting	New York	125
09/29/10	09/29/10	NYESH Builders Meeting	Buffalo	75
09/29/10	09/29/10	NYESH Builders Meeting	Albany	50

**(b) Evaluation Activities**

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

As part of the overarching Home Performance with ENERGY STAR evaluation, the impact team continued discussions to purchase its nonparticipating contractor frame in August.

**c) Other Activities**

None to Report.

**3. Customer Complaints and/or Disputes**

None to Report.

**4. Changes to Subcontractors or Staffing**

None to Report.

**5. Additional Issues**

NYSERDA is continuing to coordinate with Energy Finance Solutions (EFS), who oversees the ENERGY STAR Loans and the Assisted Home Performance Subsidies, to develop a process for identifying and reporting EEPS-eligible projects. As the process is

being developed, it is expected that there will be a lag in the reporting of EEPS-funded projects. However, once the process is implemented, it is anticipated that EEPS production numbers will increase significantly. The process is expected to be implemented in September.

## Section IV. Narrative Report to be included with spreadsheet

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Home Performance with ENERGY STAR®</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>James Reis</b>

### 1. Program Status

Although higher production numbers were reported in August, the Home Performance with ENERGY STAR® Program has recently seen an overall decline in production. Compared to this time last year, production in the Home Performance Program is down 3% in 2010. Contractors report that many people are waiting for the implementation of Green Jobs Green NY and the possible federal HomeStar program before proceeding to determine if better incentives are available from those programs. NYSERDA anticipates launching Green Jobs Green New York in October.

### 2. Program Implementation Activities

- a) **Marketing Activities** - NYSERDA received DPS approval on the Marketing and Outreach Plan in July. NYSERDA is undertaking the internal processes required to modify existing marketing contracts to add EEPS funding.

Note – the estimated contacts number represents estimated attendance at the event and does not necessarily represent the number of individuals receiving information on the program.

<b>Start Date</b>	<b>End Date</b>	<b>Event Title</b>	<b>City</b>	<b>Estimated Contacts</b>
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08/06/10	08/06/10	Going Green Night with the Buffalo Bisons!	Buffalo	60
08/07/10	08/15/10	Rediscovering Our Agricultural Roots at the Franklin County Fair	Malone	700
08/07/10	08/07/10	Warren County Youth Fair	Warrensburg	100
08/07/10	08/07/10	African American Family Day (AAFD) 2010	Albany	50

08/09/10	08/14/10	Bring a Friend in 2010 - Wayne County Fair	Palmyra	200
08/10/10	08/10/10	Home Performance w/ ENERGY STAR® Residential Contractor Orientation	Malta	50
08/10/10	08/12/10	Empire Farm Days	Seneca Falls	100
08/10/10	08/15/10	Chenango County Fair	Norwich	400
08/11/10	08/13/10	SimBuild 2010	New York	150
08/11/10	08/11/10	Yes, Your Old House Can Be Energy Efficient - Dobbs Ferry	Dobbs Ferry	50
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08/14/10	08/22/10	Homerama 2010	Penfield	300
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<b>Upcoming Events</b>				
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09/25/10	09/25/10	8th Annual Cauliflower Festival	Margaretville	23
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09/29/10	09/29/10	NYESH Builders Meeting	Albany	50

#### **b) Evaluation Activities**

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

The impact team continued discussions to purchase its nonparticipating contractor frame in August.

#### **c) Other Activities**

None to report.

### **3. Customer Complaints and/or Disputes**

None to report.

### **4. Changes to Subcontractors or Staffing**

None to report.

### **5. Additional Issues**

None to report.

## **Section IV. Narrative Report to be included with spreadsheet**

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>New York ENERGY STAR® Homes</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>James Reis</b>

### **1. Program Status**

The NYESH program has achieved 19% of its 2010 annual EEPs goal. In August, the Program saw a 22% increase in production over the previous month. Housing starts in New York State are up compared to this time last year and nearly 28% of all newly built homes in SBC territory of New York State are New York ENERGY STAR® Homes.

## 2. Program Implementation Activities

**(a) Marketing Activities** - NYSERDA received DPS approval on the Marketing and Outreach Plan in July. NYSERDA is undertaking the internal processes required to modify existing marketing contracts to add EEPs funding.

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09/29/10	09/29/10	NYESH Builders Meeting	Buffalo	75
09/29/10	09/29/10	NYESH Builders Meeting	Albany	50

**(b) Evaluation Activities**

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPs-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPs-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

During August, the impact evaluation team continued developing its sample for its participating homeowner and builder evaluation efforts. In addition, the impact team



continued exploring resources available to obtain or purchase the nonparticipating builder frame

**(c) Other Activities**

None to report.

**3. Customer Complaints and/or Disputes**

None to report.

**4. Changes to Subcontractors or Staffing**

None to report.

**5. Additional Issues**

None to report.

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**Section IV. Narrative Report to be included with spreadsheet**

**Program Administrator: NYSERDA**

**Program/Project: Statewide POS Lighting CFL**

**Reporting period: August 2010**

**Report Contact person: Mark Michalski**

**1. Program Status**

**Program Performance Goals**

Program partners continue to participate in the EEPS Incentive Program. Eight (8) CFL promotions were approved in August throughout various parts of the State. Three notable approved promotions in August were with Valu Home Center – a hardware supply store in Western NY. Valu Home Center continues to take advantage of the EEPS funding by promoting CFLs through program funded promotions just about every month. Since the inception of the EEPS CFL Expansion Program, Valu Home Center has sold 136,000 CFLs. This current string of week-long promotions focused on multipacks and specialty CFLs.

Since the Program's inception (April 1, 2009), 3,702,214 CFLs sold have been incentivized; 716,599 CFLs were incentivized in July. As of August 31<sup>st</sup>, the

Program has met 76% (2,309,720 CFLs incentivized) of its 2010 EEPS Incentive Program goals (3,043,529 CFLs incentivized).

## **2. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### **(a) Marketing Activities**

CFL packages and home assessments for the winners of the Shining Example NY CFL video/essay will be distributed in September. Finding an adequate supply of bulbs to give the winners took longer than anticipated.

Planning for the fall component of the Shining Example NY campaign is underway. Video winners will be featured in fall campaign TV commercials which are planned to begin a run in early November.

### **(b) Evaluation Activities**

The remaining onsite data collection was completed in August as part of the market/impact evaluation. Using data from the RDD and onsite evaluation activities, multistate modeling analyses will begin in the fall.

## **3. Customer Complaints and/or Disputes**

None

## **4. Changes to Subcontractors or Staffing**

None

## **5. Additional Issues**

None

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## Section IV. Narrative Report to be included with spreadsheet

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>EmPower – Electric &amp; Gas</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>Kelvin Keraga</b>

**NOTE – This narrative addresses both electric and gas funding for the EEPS-EmPower Program. Any specific issues related to gas or electric will be identified as appropriate.**

### **1. Program Status**

#### **(a) Gas**

To date, a total of 260 EEPS Gas funded projects have been assigned, with 69 completions. With the approval of additional EEPS Gas funding in June, NYSERDA continues to ramp-up production.

#### **(b) Electric**

On a cumulative basis the program is at 86% of production goal and 53% of its kWh savings goal.

### **Program Performance Goals**

NYSERDA has proposed effective utility referral mechanisms to participating utilities. While some are providing referrals through these mechanisms, others are withholding referrals pending guidance from DPS.

Reported kWh savings have been reduced to reflect the .81 realization rate reported in the March 2007 impact evaluation.

### **2. Program Implementation Activities**

#### **(a) Marketing Activities**

EmPower does not rely on traditional marketing activities, as it is a referral-based program. The marketing and outreach activities listed below are related to NYSERDA or EmPower Implementation contractor staff conducting outreach to existing or potential partners to expand the referrals into the program.

<b>EmPower - EEPS Marketing &amp; Outreach Activities</b>				
<b>Completed</b>				
<b>Date</b>	<b>Topic</b>	<b>Location</b>	<b>Audience Type</b>	<b>Approx Number of Attendees</b>
8/6/2010	EmPower Program	National Grid/Keyspan	Staff	3
8/10/2010	EmPower Program	Wayne co. Community Action	Staff	6

		Agency		
8/10/2010	EmPower Program	Rochester Pathstone	Staff	2
8/13/2010	EmPower Program	Manhattan non-profit	Staff	2
8/16/2010	EmPower Program	Manhattan - American Jewish World Svcs	Staff	2
8/16/2010	EmPower Program	Phone - Erie Co. Sr. Svcs	Staff	1
8/17/2010	EmPower Program	Email - HEAP director NYC	Staff	1
8/17/2010	EmPower Program	Save Energy, Save Dollars Workshop	Low-Income	75
8/18/2010	EmPower Program	Email - NYC DFTA Director	Staff	1
8/19/2010	EmPower Program	Essex Co. OFA	Staff/Applicants	10
8/24/2010	EmPower Program	Chenango Opportunities	Staff	2
8/27/2010	EmPower Program	Bridgespan Non-profit	Staff	2
8/31/2010	EmPower Program	Emails, letters and phone calls to LI non-profits	Staff	145
<b>Upcoming Events</b>				
<b>Date</b>	<b>Topic</b>	<b>Location</b>	<b>Audience Type</b>	<b>Approx Number of Attendees</b>
9/7/2010	EmPower Program	LIPA	Staff	2
9/15/2010	EmPower Program	Long Island housing agencies	Staff	5

**(b) Evaluation Activities**

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

During August, the impact team continued to pursue utility billing data for its evaluation activities.

**3. Customer Complaints and/or Disputes**

None

**4. Changes to Subcontractors or Staffing**

None

**5. Additional Issues :**

None

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**Section IV. Narrative Report to be included with spreadsheet**

**Program Administrator:** NYSERDA  
**Program/Project:** Workforce Development  
**Reporting period:** August 2010  
**Report Contact person:** Lee Butler

**2. Program Status**

PON 1816: We have received seven new partnership proposals from training organizations bringing our total to twenty. Several new certification reimbursement applications have been received and are under review, with thirteen approved to date. Total applications received (organizations and individuals) = 33 with a total funding request of just over \$1.3 million. Currently, the \$400,000 available funding for “Career Pathways: Basic Skills Training” has been encumbered.

PON 1817: The Energy Efficiency Career Pathways Training and Technical Training PON due date was August 3, 2010. NYSERDA received twenty proposals. A technical evaluation panel (TEP) reviewed and ranked the proposals. The TEP decided that eleven of the proposals submitted were fundable, however some will not receive funding due to funding limitations. The proposals have been summarized and will be presented to NYSERDA management for approval before contracts are negotiated with the successful proposers.

As stated in last month’s report, development of new learning sites continues. To summarize, SUNY Canton, Bronx CC, and Ulster CC will teach BPI recognized classes at several locations in their region thus providing more training opportunities for building technicians. Hudson Valley CC continues working with SUNY Cobleskill and Alfred State to have them become new learning centers in the Center for Energy Efficiency and Building Science (CEEBS) network. By the end of 2010 CEEBS will be conducting classes at over 25 sites across the SBC utility territories.

### **Program Performance Goals**

Current economic circumstances appear to have a positive effect on achieving project performance goals, with a large labor pool seeking new job skills to enhance employment prospects. However, new trainees are generally referred from unemployment offices and Weatherization Agencies. General contractors and home energy companies that have previously sent employees for training seem to be holding at current employment levels rather than expanding, and therefore are not requesting additional training at this time.

The eighteen month timeline was a challenge for securing necessary training partners, enrolling students, and training the number of students projected under the plan. At NYSERDA's request, DPS has approved an extension of this timeline to June 1, 2012.

## **2. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### **(a) Marketing Activities**

In partnership with the Governor's staff, NYS DOL and several other state agencies, NYSERDA helped launch GreenCareersNY.com. This web site will serve as the training and job portal required under the Operating Plan and will be an integral part of our marketing activities. Additionally, training partners will be able to request cooperative advertising funding through a Training Partnership Agreement to help market specific training initiatives. All training initiatives developed and implemented will be posted on GreenCareersNY.com. An email announcing the availability of the Training Partner Agreement has been sent to the numerous potential training partners identified by NYSERDA and other EEPS stakeholders over the past year. Total students trained at the Center for Energy Efficiency and Building Science Learning Centers (CEEBS) through August 2010 was 1051. See Below for list of scheduled training.

<b>Open Date</b>	<b>End Date</b>	<b>Training</b>	<b>Training Site</b>	<b>Region/ County Serving</b>
<b>Completed Training</b>				
08/02/10	08/06/10	Photovoltaic (PV) Design & Installation Basics	SUNY Delhi, Delhi, NY	CENTRAL NEW YORK
08/16/10	08/17/10	Cooling Professional	Onondaga Cortland Madison BOCES, Liverpool	CENTRAL NEW YORK
08/16/10	08/24/10	Building Analyst	Westchester Comm. College, Valhalla	NYC - NORTH
08/19/10	09/13/10	Geothermal Heat Pump Theory for Practitioners	Ulster BOCES, Port Ewen	ULSTER

08/20/10	08/20/10	Sales & Marketing	Onondaga Cortland Madison BOCES,Liverpool	CENTRAL NEW YORK
08/23/10	08/27/10	Heating Professional	Association for Energy Affordability.Bronx	NYC - NORTH
08/23/10	09/01/10	Building Analyst	Borough of Manhattan Comm.College, NY	NYC - NORTH
08/30/10	09/01/10	Cooling Professional	Association for Energy Affordability.Bronx	NYC - NORTH
08/30/10	09/15/10	Electrical Theory for Renewable Energy Practitioners	Ulster BOCES, Port Ewen	ULSTER
<b>Upcoming Training</b>				
09/01/10	09/11/10	Building Analyst	Hudson Valley Community College,Troy	CAPITAL/ SARATOGA
09/08/10	09/17/10	Building Analyst	Association for Energy Affordability.Bronx	NYC – NORTH
09/08/10	09/15/10	Envelope Professional	Hudson Valley Community College,Malta	CAPITAL/ SARATOGA
09/13/10	09/13/10	SPARE: Solar Power As Renewable Energy Basic PV Installation Course	Onondaga Community College,Syracuse	NORTH COUNTRY
09/13/10	09/20/10	Building Analyst	Erie Community College, Buffalo	WESTERN NEW YORK
09/13/10	09/17/10	Envelope Professional	Clinton Community College,Plattsburgh	NORTH COUNTRY
09/13/10	09/17/10	Heating Professional	Association for Energy Affordability.Bronx	NYC – NORTH
09/15/10	09/29/10	IGSHPA Geothermal Heat Pump Accredited Installer Workshop	Ulster BOCES, Port Ewen	ULSTER
09/15/10	09/30/10	Building Analyst	SUNY Ulster Community College,Kingston	MID HUDSON
09/16/10	10/21/10	Electrical Theory for Renewable Energy Practitioners	Ulster BOCES,Port Ewen	ULSTER
09/20/10	09/30/10	Multifamily Building Analyst	Association for Energy Affordability.Bronx	NYC – NORTH
09/20/10	09/25/10	Building Analyst	Broome Community Colleget, Binghamton	SOUTHERN TIER
09/22/10	09/29/10	Building Analyst	Hudson Valley Community College, Troy	CAPITAL/ SARATOGA
09/22/10	10/25/10	Introduction to PV Technology	Ulster BOCES,Port Ewen	ULSTER
09/23/10	09/29/10	Envelope Professional	No locations listed	NYC – NORTH
09/27/10	10/06/10	Building Analyst	Orange Community College, Middletown	MID HUDSON
09/27/10	10/01/10	Heating Professional	SUNY Canton, Canton	NORTH COUNTRY

09/27/10	10/28/10	Advanced SPARE (Solar Power As Renewable Energy) Training: hybrid online/onsite course	SUNY-Environmental Science & Forestry, Syracuse	NORTH COUNTRY
09/30/10	10/16/10	Building Analyst	HFM BOCES, Johnstown	CAPITAL/ SARATOGA

**(b) Evaluation Activities**

A revised version of the detailed evaluation plan was sent to DPS in August for approval. In addition, the logic modeling team met with program staff in August to discuss a draft logic model. Comments received from program staff will be incorporated into a revised version.

**(c) Other Activities**

Progress on construction of four pressure houses continues. The NYSWDA project manager is working with the schools to develop specifications for the houses and has contacted homebuilders about challenges presented in the special construction needs of these houses. All four schools have signed their Letters of Intent with DHCR. DHCR is now working on a memorandum of agreement (MOA) for the schools to execute with DHCR. HVCC has some additional requirements to meet as the pressure house for that school is projected to be located at STEP. Because HVCC will be leasing land, they must work with the STEP property manager to coordinate construction. HVCC is working with DHCR to make sure those property manager costs are eligible to be covered under the grant. Also, because the lease is with a state organization, the Office of General Services has a requirement for a 90 review period for a lease. This requirement could impact the house construction schedule.

At the August meeting of the Energy Efficiency Program Administrators Collaborative (EEPAC), NYSERDA presented on its current Workforce Development activities. NYSERDA will continue to keep the utilities informed of workforce activities and seek input from the utilities on their workforce development needs.

**3. Customer Complaints and/or Disputes**

None

**4. Changes to Subcontractors or Staffing**

None



## 5. Additional Issues

The Status Report spreadsheet template does not align well with the measurable objectives of the Workforce Development Plan approved by DPS. NYSERDA is creating a database to collect workforce development data. That data can be included in the monthly narrative report to show monthly progress on the project.

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## Section IV. Narrative Report to be included with spreadsheet

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Electric Low Income Multifamily Performance Program</b> <b>Electric Multifamily Performance Program</b> <b>Gas Low Income Multifamily Performance Program</b> <b>Gas Multifamily Performance Program</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>Michael Colgrove / Luke Falk</b>

The following narrative report addresses the four EEPS-funded Multifamily Performance Programs, as listed above in the Program Project section. Any specific issues related to gas/electric or low-income/market-rate will be identified as appropriate.

### 1. Program Status

#### Program Performance Goals

NYSERDA is in the process of developing the program's technical and administrative documentation and protocols in anticipation of the re-launch in September 2010.

Under the Rebalancing Order issued 6/24/2010, program administrators were provided the flexibility to re-allocate up to 10% of funds from program to program within an end-use sector. NYSERDA is exploring the idea of allocating funding away from the ERMM program toward the Market-rate, electric-funded MPP program, and will work with DPS to advance this discussion.

### 2. Program Implementation Activities

**This section is designated to quantify major activities not captured in the progress spreadsheet.**

- (a) *Marketing Activities* - NYSERDA received DPS approval on the Marketing and Outreach Plan in July. NYSERDA is undertaking the internal processes required to modify existing marketing contracts to add EEPS funding.

(c) Evaluation Activities

NYSERDA is in the process of updating its detailed evaluation plan for this program (as part of the larger Multifamily Performance Program) and will submit it to DPS for review and approval in the coming months.

As part of its required refrigerator M&V study, NYSERDA and DPS have agreed to focus on EEPS-funded MPP refrigerators instead of SBC-funded MPP refrigerators. This focus on EEPS-funded refrigerators will necessitate a delay in initiating this study to ensure an adequate number of refrigerators have been installed. NYSERDA and DPS will determine an appropriate due date for this effort.

**3. Customer Complaints and/or Disputes**

None

**4. Changes to Subcontractors or Staffing**

None

**5. Additional Issues**

None

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**Section IV. Narrative Report to be included with spreadsheet**

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Electric Reduction in Master Metered Multifamily Buildings</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>Michael Colgrove / Luke Falk</b>

**1. Program Status**

**Program Performance Goals**

On Monday July 26th NYSERDA and DPS staff held a conference call to discuss impediments to the deployment of EEPS-funded multifamily programs. During that call two significant issues were discussed. All participants agreed that there is currently no metering technology approved by DPS staff for use in the Electric Reduction in Master Metered Buildings (ERMM) program. DPS stated that no metering vendors had been able to produce sufficient documentation to evidence compliance with relevant ANSI standards (C12 and others) and therefore the meters could not be approved for use in the program.

Under direction from DPS staff, NYSERDA is investigating the use of ratepayer funds to pay for the testing equipment in order to establish compliance with program standards. Under the direction of DPS staff, NYSERDA contacted MetLabs in Maryland to gather information regarding the cost of testing metering equipment for use in the program. MetLabs quoted a price of between \$50,000-\$70,000 per piece of equipment. The exact cost will be dependent upon the volume of equipment submitted for testing and other variables. The suggested manner in which these costs will be borne by the program will be expressed in a revised program operating plan for the program, which NYSERDA intends to submit to DPS in late September.

In the interim, before tests results are acquired, NYSERDA is awaiting guidance from DPS as to whether it is authorized to allow use of meters in the program that do not yet have testing results. NYSERDA and DPS will continue to work toward a resolution that enables NYSERDA to launch the program as soon as possible. For more information on this issue, see Narrative from EEPS Scorecards from June and July 2010.

Also discussed on the July 26<sup>th</sup> call was the definition of affordable housing to be used in the ERMM program. Prior to the call NYSERDA had received conflicting guidance as to what level of regulation and subsidy was required in order to designate an apartment as affordable housing as it relates to the ERMM program. DPS requested additional information as to the conflicting guidance. This information has been submitted and NYSERDA will work with DPS to clarify any outstanding questions. This issue has not yet been resolved. For more information on this issue, see Narrative from EEPS Scorecard June 2010.

Without approved meters and without a definition of affordable housing, the program cannot be launched.

Under the Rebalancing Order issued 6/24/2010, program administrators were provided the flexibility to re-allocate funds from program to program within an end-use sector. NYSERDA is exploring the idea of allocating funding away from the ERMM program toward the Market-rate, electric-funded MPP program, and will work with DPS to advance this discussion. NYSERDA intends to submit a revised operating plan for this program containing this request in late September.

## **2. Program Implementation Activities**

### *(d) Marketing Activities*

None

### *(e) Evaluation Activities*

NYSERDA is in the process of updating its detailed evaluation plan for this program (as part of the larger Multifamily Performance Program) and will submit it to DPS for review and approval in the coming months.

## **3. Customer Complaints and/or Disputes**

None

**4. Changes to Subcontractors or Staffing**

None

**5. Additional Issues**

None

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**Section IV. Narrative Report to be included with spreadsheet**

<b>Program Administrator:</b>	<b>NYSERDA</b>
<b>Program Project:</b>	<b>Geothermal Heat Pump Systems in Multifamily Buildings</b>
<b>Reporting Period:</b>	<b>August 2010</b>
<b>Report Contact Person:</b>	<b>Michael Colgrove / Luke Falk</b>

**1. Program Status**

**Program Performance Goals**

During the month of August there was no change in the status of the EEPS Geothermal program for multifamily buildings. The information contained in the July EEPS Narrative Report remains unchanged as no resolution has been reached in relation to the concerns expressed therein. The information from the July report is reproduced here below.

*From the July 2010 Report:*

Monday July 26th NYSERDA and DPS staff held a conference call to discuss impediments to the deployment of EEPS-funded multifamily programs. During that call two issues were discussed. First, NYSERDA articulated an on-going concern that the program would have a difficult time identifying TRC-compliant projects due to the program's electric funding source. Typically geothermal installations save fuel and add electric load to buildings. Under the Rebalancing Order issued 6/24/2010, program administrators were provided the flexibility to re-allocate funds from program to program within an end-use sector. NYSERDA suggested that we explore the idea of allocating funding from the EEPS market-rate, gas-funded MPP to the geothermal program as a way to more closely align project needs with potential funding sources. NYSERDA will continue to pursue this idea in consultation with DPS staff.

NYSERDA is developing the Request for Proposal that will be utilized to select building to receive geothermal incentives. A requirement of the RFP will be for buildings to be

participating in the Multifamily Performance Program. Due to the anticipated launch date of July for MPP, NYSERDA anticipates the solicitation to be released in August.

## **2. Program Implementation Activities**

### *(a) Marketing Activities*

None

### *(b) Evaluation Activities*

NYSERDA is in the process of updating its detailed evaluation plan for this program (as part of the larger Multifamily Performance Program) and will submit it to DPS for review and approval in the coming months.

## **3. Customer Complaints and/or Disputes**

None

## **4. Changes to Subcontractors or Staffing**

None

## **5. Additional Issues**

None

## COMMERCIAL/INDUSTRIAL – Pages 22-35

**Program Administrator: NYSERDA**  
**Program/Project: Existing Facilities Program**  
**Reporting period: August 2010**  
**Report Contact person: Eric Mazzone**

### 3. Program Status

#### Program Performance Goals

- (a) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).
- The State and national economies have experienced a dramatic downturn in the time since the 2007 NYSERDA Fast Track proposal to the June 23, 2008 Order and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.
  - Recent Order provides Investor Owned Utilities the authority to run incentive programs that directly overlap with Existing Facilities Program and could cause confusion in the marketplace.
  - SBC proration for customers paying less than 50% SBC is still an open issue that has caused some confusion in the market place.
  - EFP gas metrics were revised and filed to reflect the removal of St. Lawrence and Corning participation.
- (b) Describe and discuss other key aspects of program performance goals that were not discussed in (a). N/A
- (c) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast. N/A

### 2. Program Implementation Activities

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

#### (a) Marketing Activities

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July.

Research findings will help confirm messaging and inform communications plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in September/October.

- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are completed. Mini-bid to select contractor for EEPS C&I integrated communications plan development will be issued w/o September 13 with contractor selection by late October.

#### (b) Evaluation Activities

- As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.
- During August, the Impact team drew its sample for its EFP evaluation. In addition, the Markets team received comments from DPS on its draft program logic model and these comments will be incorporated into a revised version. A revised version of the markets EFP work plan will be sent to DPS and program staff in early September for review.

#### (c) Other Activities

List and describe major accomplishments not captured in either the spreadsheet or this report. Describe work activities in quantitative and qualitative terms.

### 3. Customer Complaints and/or Disputes

Describe any customer disputes or complaints and how they have been resolved.

N/A

### 4. Changes to Subcontractors or Staffing

Describe any staff or subcontractor/consultant changes.

N/A

## **5. Additional Issues**

N/A

**Program Administrator: NYSERDA**  
**Program/Project: Flex Tech Program**  
**Reporting period: August 2010**  
**Report Contact person: Jaime Ritchey**

## **4. Program Status**

### **Program Performance Goals**

- (a) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).
- The State and national economies have experienced a dramatic downturn in the time period from the 2007 NYSERDA Fast Track proposal, to the June 23, 2008 Order, and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.
- (b) Describe and discuss other key aspects of program performance goals that were not discussed in (a). N/A
- (c) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast. N/A

## **2. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### **(a) Marketing Activities**

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July. Research findings will help confirm messaging and inform communications



plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in September/October.

- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are completed. Mini-bid to select contractor for EEPS C&I integrated communications plan development will be issued w/o September 13 with contractor selection by late October.

(b) Evaluation Activities

- As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.
- The Impact Evaluation team completed its Measure Adoption Rate data collection in August. In addition, the Market Characterization and Assessment (MCA) team began fielding its nonparticipant end user survey and prepared to pretest its nonparticipant technical service providers survey.

(c) Other Activities

**3. Customer Complaints and/or Disputes**

None to report.

**4. Changes to Subcontractors or Staffing**

None to report.

**5. Additional Issues**

**Program Administrator: NYSERDA**  
**Program/Project: FlexTech - Gas**  
**Reporting period: August 2010**  
**Report Contact person: Jaime Ritchey**

## **5. Program Status**

### **Program Performance Goals**

- (a) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).
- The State and national economies have experienced a dramatic downturn in the time period from the 2007 NYSERDA Fast Track proposal, to the June 23, 2008 Order, and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.
- (b) Describe and discuss other key aspects of program performance goals that were not discussed in (a). N/A
- (b) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast. N/A

## **2. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### **(a) Marketing Activities**

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July. Research findings will help confirm messaging and inform communications plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in September/October.
- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are completed. Mini-bid to select contractor for EEPS C&I integrated communications plan development will be issued w/o September 13 with contractor selection by late October.

(b) Evaluation Activities

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

The Impact Evaluation team completed its Measure Adoption Rate data collection in August. In addition, the Market Characterization and Assessment (MCA) team began fielding its nonparticipant end user survey and prepared to pretest its nonparticipant technical service providers survey.

(c) Other Activities

None to report

**3. Customer Complaints and/or Disputes**

None to report.

**4. Changes to Subcontractors or Staffing**

None to report.

**5. Additional Issues**

**Program Administrator: NYSERDA**

**Program/Project: Industrial and Process Efficiency - Electric**

**Reporting period: August 2010**

**Report Contact Person: Mark Gundrum**

**6. Program Status**

**Program Performance Goals**

- (c) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).

- The State and national economies have experienced a dramatic downturn in the time period from the 2007 NYSERDA Fast Track proposal, to the June 23, 2008 Order, and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.

(b) Describe and discuss other key aspects of program performance goals that were not discussed in (a). N/A

(d) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast. N/A

## **2. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

(b) Marketing Activities

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July. Research findings will help confirm messaging and inform communications plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in September/October.
- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are completed. Mini-bid to select contractor for EEPS C&I integrated communications plan development will be issued w/o September 13 with contractor selection by late October.
- Ongoing market research as needed to support site visits.
- Updating of industry vendors and trade associations.
- Strategic partner interaction and development.
- NYSERDA and/or Focus Contractors participated in the following August 2010 events:

**Incentive Check Presentation to Ball Corporation, Saratoga Springs, 8/2/10** – Check presented by Brian Platt and Chris Stump.

**2010 Industrial Utility Webinar, 8/5/10** – Attended by ERS, discussed ways to achieve employee engagement in energy efficiency.

**Panel on the Future of Manufacturing in Brooklyn, Brooklyn, NY, 8/25/10** – ERS attended the presentation and met with manufacturers attending the event.

**Empire State Development Corporation, New York, NY, 8/27** – ERS met with the Director of Economic Innovation Programs, the New York City Regional Director, and the Co-Director of Manufacturing Assistance Programs to discuss outreach opportunities.

**Outreach Workshops** – CHA conducted 2 outreach workshops in the Finger Lakes Region and 3 outreach workshops in the North Country Region of New York State.

During the month of August 2010, CHA refined case studies and continued developing the presentation for the Compressed Air Challenge Training scheduled for later this year.

During the month of August 2010, ERS also attended 18 IDA, EDC, manufacturing member, and/or vendor events.

- Focus Contractor outreach during the month of August resulted in contact through telephone, proposals, follow-up meetings, and/or site visits with 60 customers in the Tier I market, 94 customers in the Tier II market, and 13 customers in the <0.5 MW market. The Focus Contractor outreach activities for the month of August resulted in 12 new IPE projects being brought into NYSERDA incentive and technical assistance programs bringing the total incentives to date to approximately \$10,883,346.
- Focus Contractors continued to develop relationships with 58 stakeholder and partner organizations in an effort to collaborate on bringing benefits to industrial constituents. Focus Contractors also continued to develop relationships with several County and local IDAs and Economic Development agencies.
- Focus Contractors continue to develop and work with Salesforce.com as a tracking tool.

(b) Evaluation Activities

- As described in the detailed evaluation plan for this program, NYSERDA will collectively evaluate electric and natural gas-funded EEPs-funded projects. As natural gas-funded EEPs projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.
- The impact team continued to develop its workplan in August incorporating revised retrofit protocols. The markets evaluation team continued refining and shortening its eligible end user survey instrument. Further, the markets team considered conducting targeted data collection for specific market actors; a final decision on the additional data collection will be made in September. The second round of process evaluation interviews with program staff, technical reviewers and Focus contractors began in August.

(c) Other Activities

None to report

**3. Customer Complaints and/or Disputes**

None to report.

**4. Changes to Subcontractors or Staffing**

None to report.

**5. Additional Issues**

**Program Administrator: NYSERDA**

**Program/Project: Industrial and Process Efficiency - Gas**

**Reporting period: August 2010**

**Report Contact Person: Mark Gundrum**

**7. Program Status**

**Program Performance Goals**

- (e) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).

- The State and national economies have experienced a dramatic downturn in the time period from the 2007 NYSERDA Fast Track proposal, to the June 23, 2008 Order, and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.

(b) Describe and discuss other key aspects of program performance goals that were not discussed in (a). N/A

(f) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast. N/A

## 2. Program Implementation Activities

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### (c) Marketing Activities

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July. Research findings will help confirm messaging and inform communications plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in September/October.
- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are completed. Mini-bid to select contractor for EEPS C&I integrated communications plan development will be issued w/o September 13 with contractor selection by late October.
- Ongoing market research as needed to support site visits.
- Updating of industry vendors and trade associations.
- Strategic partner interaction and development.
- NYSERDA and/or Focus Contractors participated in the following August 2010 events:

**Incentive Check Presentation to Ball Corporation, Saratoga Springs, 8/2/10** – Check presented by Brian Platt and Chris Stump.

**2010 Industrial Utility Webinar, 8/5/10** – Attended by ERS, discussed ways to achieve employee engagement in energy efficiency.

**Panel on the Future of Manufacturing in Brooklyn, Brooklyn, NY, 8/25/10** – ERS attended the presentation and met with manufacturers attending the event.

**Empire State Development Corporation, New York, NY, 8/27** – ERS met with the Director of Economic Innovation Programs, the New York City Regional Director, and the Co-Director of Manufacturing Assistance Programs to discuss outreach opportunities.

**Outreach Workshops** – CHA conducted 2 outreach workshops in the Finger Lakes Region and 3 outreach workshops in the North Country Region of New York State.

During the month of August 2010, CHA refined case studies and continued developing the presentation for the Compressed Air Challenge Training scheduled for later this year.

During the month of August 2010, ERS also attended 18 IDA, EDC, manufacturing member, and/or vendor events.

- Focus Contractor outreach during the month of August resulted in contact through telephone, proposals, follow-up meetings, and/or site visits with 60 customers in the Tier I market, 94 customers in the Tier II market, and 13 customers in the <0.5 MW market. The Focus Contractor outreach activities for the month of August resulted in 12 new IPE projects being brought into NYSERDA incentive and technical assistance programs bringing the total incentives to date to approximately \$10,883,346.
- Focus Contractors continued to develop relationships with 58 stakeholder and partner organizations in an effort to collaborate on bringing benefits to industrial constituents. Focus Contractors also continued to develop relationships with several County and local IDAs and Economic Development agencies.
- Focus Contractors continue to develop and work with Salesforce.com as a tracking tool.



(b) Evaluation Activities

- As described in the detailed evaluation plan for this program, NYSERDA will collectively evaluate electric and natural gas-funded EEPS-funded projects. As natural gas-funded EEPS projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.
- The impact team continued to develop its workplan in August incorporating revised retrofit protocols. The markets evaluation team continued refining and shortening its eligible end user survey instrument. Further, the markets team considered conducting targeted data collection for specific market actors; a final decision on the additional data collection will be made in September. The second round of process evaluation interviews with program staff, technical reviewers and Focus contractors began in August.

(c) Other Activities

None to report

**3. Customer Complaints and/or Disputes**

None to report.

**4. Changes to Subcontractors or Staffing**

None to report.

**5. Additional Issues**

Program Administrator: NYSERDA  
Program/Project: New Commercial Buildings Program  
Reporting period: August 2010  
Report Contact person: Priscilla Richards

## **8. Program Status**

### **Program Performance Goals**

- (c) Describe and discuss circumstances that may have an impact on the achievement of project performance goals (positive or negative).
- The State and national economies have experienced a dramatic downturn in the time since the 2007 NYSERDA Fast Track proposal to the June 23, 2008 Order and to the March 13, 2009 Supplemental Revision to the SBC Operating Plan.
  - Newly planned or accelerated upgrades to New York City, New York State and federal energy codes, standards, regulations and executive orders have been identified since the 2007 NYSERDA Fast Track proposal, the June 23, 2008 Order and the March 13, 2009 Supplemental Revision to the SBC Operating Plan.
- (d) Describe and discuss other key aspects of program performance goals that were not discussed in (a).
- Of the 548 program applications received to date for electric energy savings, 80 projects have been cancelled. The remaining 468 projects represent 69 million SF in new construction and major renovation activity. Of the 468 projects, 17 have been installed, 51 currently have incentive funds encumbered, 173 have technical assistance studies underway and 227 are in the scoping stage during program development and schematic design.
- (c) Provide updates to the forecast of net energy and demand impacts. The forecast should be updated at least annually. Note and explain any discrepancies between the filed program goal and the latest forecast.

## **9. Program Implementation Activities**

**This section is designed to quantify major activities not captured in the progress spreadsheet.**

### **(a) Marketing Activities**

- Fieldwork for Commercial/Industrial Quantitative Benchmark research is complete. An analysis of findings was presented to NYSERDA staff in July. Research findings will help confirm messaging and inform communications plans based on approved DPS program marketing plans. A meeting with DPS and their marketing contractor will be scheduled in the coming month.
- Messaging for core programs is complete.
- Contracts to secure full-service marketing partners to help refine messaging and implement bolstered marketing activities are nearing completion. Mini-bid to select contractor for EEPS C&I integrated communications plan development and implementation to follow.

The following are highlights of current Outreach and Marketing activities conducted:

- Outreach Project Consultants followed up on leads for 71 projects. Two leads were referred to other programs.
- NYSERDA staff and Outreach Project Consultants participated in and networked at SimBuild 2010, an international conference on modeling held in New York City from August 11 through August 13 to improve the design and operations of buildings. NYSERDA staff chaired three of the technical sessions and Peter Douglas spoke at the closing plenary session. NYSERDA also has a table in the exhibit area. Roughly 500 people attended the conference.
- Outreach Project Consultants made 1 presentation and attended 4 events for networking purposes. The presentation was for the US Green Building Council Orange County Chapter, with 30 people attending. The networking events included Black and Sustainable in NYC on August 5<sup>th</sup> (50 people), AIA New York City monthly lecture series on August 19<sup>th</sup> (25 people), and Venco Sales Energy Efficiency Expo in New York City on August 24<sup>th</sup> (25 people). The audiences included architects, engineers, and developers.

(b) Evaluation Activities

As described in the detailed evaluation plan for this program, NYSERDA collectively evaluates both **New York Energy \$mart<sup>SM</sup>** and EEPS-funded projects. As evaluation activities commence, particularly for impact evaluation, **New York Energy \$mart<sup>SM</sup>**-funded projects will be the majority of projects sampled. However, as EEPS-funded projects are completed, they will then be incorporated into NYSERDA's evaluation efforts.

The impact team contractor began conducting site visits on participating projects and continued pursuing utility billing release forms in August. In addition, the process evaluation team continued its primary data collection with program participants and OPCs/TAs. An interim process evaluation presentation is expected in September along with a written process evaluation interim report.

(c) Other Activities

List and describe major accomplishments not captured in either the spreadsheet or this report. Describe work activities in quantitative and qualitative terms.

## 10. Customer Complaints and/or Disputes

**Describe any customer disputes or complaints and how they have been resolved.**

## 11. Changes to Subcontractors or Staffing

**Describe any staff or subcontractor/consultant changes.**

## 12. Additional Issues