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ENERGY DIVISION

ENERGY EFFICIENCY IN NONPROFIT AGENCIES: CREATING EFFECTIVE PROGRAM MODELS

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ABSTRACT

Nonprofit agencies are a critical component of the health and human services system in the U.S. It has been clearly demonstrated by programs that offer energy efficiency services to nonprofits that, with minimal investment, they can reduce their energy consumption by ten to thirty percent. This energy conservation potential motivated the Department of Energy and Oak Ridge National Laboratory to conceive a project to help states develop energy efficiency programs for nonprofits. The purpose of the project was two-fold: (1) to analyze existing programs to determine which design and delivery mechanisms are particularly effective, and (2) to create model programs for states to follow in tailoring their own plans for helping nonprofits with energy efficiency programs.

Twelve existing programs were reviewed, and three model programs were devised and put into operation. The model programs provide various forms of financial assistance to nonprofits and serve as a source of information on energy efficiency as well.

After examining the results from the model programs (which are still on-going) and from the existing programs, several "replicability factors" were developed for use in the implementation of programs by other states. These factors — some concrete and practical, others more generalized — serve as guidelines for states devising programs based on their own particular needs and resources.

CHAPTER 1

INTRODUCTION

Nonprofit organizations are a critical component of the health and human services system in the U.S. More than 400,000 agencies provide their communities with every manner of service — day care, health services, drug abuse prevention, housing development, literacy, fitness training — to name a few.

In terms of their energy needs, nonprofit agencies do not differ much from many small commercial establishments. They occupy similar types of facilities and they possess significant potential to improve their energy efficiency. Service provider agencies spend billions of dollars to heat, light, and cool their facilities; an average agency spends between five and fifteen percent of its budget on energy. It has been clearly demonstrated by programs that offer energy efficiency services to nonprofits that, with minimal investment, they can reduce their energy consumption by ten to thirty percent. This potential represents hundreds of millions of dollars that can be redirected to services instead of to utility bills, and this is the underlying reason for the programs described on the following pages.

The Alliance to Save Energy and United Way of America have been partners in studying and developing energy efficiency programs for nonprofits since the early 1980s.[1] In 1981 United Way offered workshops to agencies in thirty communities. The workshops were well-attended and highly rated by attendees, but, unfortunately no system was put in place to follow up the workshops or to offer energy services to the agencies after the basic information was delivered. A survey conducted two years after the workshops revealed that only two of the thirty workshops produced identifiable results.

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[1]This is not to imply that the Alliance and United Way are the only organizations concerned about energy efficiency for nonprofits. Programs, primarily local, were created by others, including the Metropolitan Energy Center in Kansas City, Center for Neighborhood Technology in Chicago, NOPEC in New York, the North Carolina Alternative Energy Corporation, and Technical Development Corporation in Boston.

In 1985 and 1986, the Alliance and United Way collaborated on a study and survey to identify the main barriers that prevent nonprofits from becoming more energy efficient, including: limited information, tight budgets, and lack of administrative resources.

Following the study, both organizations, with corporate contributions from Exxon, created programs that would go beyond workshops and beyond audits to assist nonprofit agency pursue energy efficiency improvements. The programs were somewhat successful — a few local utilities and State Energy Offices (SEOs) began to pay attention to the issue, and many agencies were successfully "weatherized." One of the principal resources was funds earmarked out of the Petroleum Violation Escrow (PVE). It was clear, however, that PVE funds would be limited and that other resources would be needed if agencies were to receive the help they need to reduce their energy dependency. It was with that in mind that the U.S. Department of Energy (DOE) was approached for assistance.

In 1987-1988, DOE and Oak Ridge National Laboratory (ORNL) conceived a project to help states develop energy efficiency programs for the nonprofit sector. Most other sectors had at least a modicum of support via the State Energy Office system: the Institutional Conservation Program for Schools and Hospitals, a wide array of utility and state-sponsored programs for business and industry, and the Low-Income Home Energy Assistance and Weatherization Assistance Programs for the low-income population.

The DOE/ORNL project had two parts: the creation of model programs and the analysis of existing programs that employ designs and delivery mechanisms that appeared to be particularly effective. Three states were selected in which to create and demonstrate energy efficiency for nonprofits. The idea was that the three states would serve as "laboratories" for state-of-the-art principles of effective program design. The three model programs instituted are described in Chapter 2. Each of the three programs are still in progress in their respective states.

Chapter 3 describes and summaries the lessons learned from an analysis of twelve existing energy efficiency programs. These twelve programs provided insights that were valuable in developing program options for the three model programs. They also offered a means to generalize the program's findings beyond the three model programs.

Chapter 4 summarizes the lessons learned from both parts of the DOE/ORNL project.

CHAPTER 2

THREE MODELS STATES CAN USE TO DEVELOP NONPROFIT ENERGY EFFICIENCY PROGRAMS

OVERVIEW

This chapter describes three model programs that states can use to create their own energy efficiency programs for nonprofit health and human service agencies. Model programs were solicited and developed to represent a range of program types and state geographic features. State energy offices were notified of the opportunity to be selected to receive technical assistance in creating these model programs in mid-1988. Eleven completed proposals were received.

Programs were selected based upon the following criteria:

- the quality, replicability, and practicality of the proposed program design;
- the level of interest from the state's nonprofits;
- the availability of data sources that would permit evaluation of the program as well as the development of nonprofit energy use profiles;
- the state energy office's need for technical assistance;
- the state's ability to share project costs; and
- the proposed program's overall "fit" in the desired range of program types and state characteristics.

This process resulted in the selection of New Jersey, Ohio, and Nevada to receive technical assistance in developing model programs. These three states represent eastern, midwestern, and western regions; they span urbanized and rural regions; and their programs range from smaller and simpler to larger and more complex.

The three states present interesting contrasts and challenges in the nature of their nonprofit sectors. For example, New Jersey's urbanized service area holds such a large and

diverse nonprofit population that it is difficult to identify and reach them. The challenge in this state is to identify the most efficient networks for reaching nonprofits. Because United Ways were large and active in each major county served by the program, they were selected as the initial access route.

At the opposite extreme is southeastern Ohio's rural service area, whose nonprofit sector is comparatively sparse. This creates an opposite but equally difficult challenge to find and contact the whole nonprofit sector. The Corporation for Ohio Appalachian Development (COAD) provided a network for reaching nonprofits, but the large size of the service area (30 counties) and the small and scattered nature of the nonprofit sector created logistical problems in identifying and reaching all potential participants.

Nevada's nonprofit sector is markedly different from those in the other two programs. The state's population is small, which limits the size of the nonprofit network and thus makes it easier to identify. Moreover, the concentration of the population in the Reno and Las Vegas areas creates a relatively efficient means of access to the nonprofit sector. Each of these metropolitan areas has a nonprofit "umbrella" network which includes both United Way and other organizations who know the agencies and can reach them effectively.

Each state faced different challenges in designing and implementing its nonprofit programs. In all three, however, the greatest challenge appeared to be identifying and reaching the nonprofit sector. Once they succeeded in contacting the right audience, the programs seemed to do well in recruiting participants with a variety of services and financing options. In fact, designing the right service/financing was not the primary problem for these three programs. Participating agencies responded well to various packages of audits, technical assistance, rebates, loans, and grants.

The following sections of this chapter will provide a detailed overview of the three model programs.

1. NEW JERSEY: CREATING EFFECTIVE PROGRAM MODELS FOR ENERGY EFFICIENCY IN NONPROFIT AGENCIES

SUMMARY

This program was created through a cooperative effort between the New Jersey Department of Commerce, Energy, and Economic Development (DCEED) and Jersey Central Power and Light Company (JCP&L). Its primary purpose is to reach, by joint action, a larger number of nonprofit building owners — with a more comprehensive package of energy efficiency services — than could be reached by the two organizations separately. A related objective includes gathering data on the energy use patterns and energy savings potential in nonprofit buildings.

One of the most unique features of this program is its joint marketing of utility and state programs. The program combines several utility-offered services, such as commercial energy audits and equipment rebates, with the state's zero-interest loans to offer nonprofits a "one-stop" source for the technical expertise, financing, and project management needed to make energy retrofits happen.

THE DEVELOPMENT PROCESS

The need for this program arose from several sources. JCP&L was looking for ways to increase participation in its various commercial energy efficiency programs and to learn more about customer energy needs in the commercial sector. DCEED saw a need to find a better way to deliver their energy efficiency services to nonprofits, and also wanted to make wider use of its Business Energy Improvement Program (BEIP), which includes zero-interest loans for energy retrofits. Both organizations wanted to learn more about the energy use patterns and energy efficiency needs of the hard-to-categorize nonprofit sector.

JCP&L approached DCEED with the idea of a joint program. The two organizations then worked to develop a detailed plan for the program. When the DOE solicitation was issued, they applied jointly to receive technical assistance from the project team. With the project team's help, they quickly completed the program design and put the program in operation.

The key issue in designing the program was finding effective ways to reach nonprofits. The nonprofit sector is large and diffuse, and neither utility customer data bases nor state information sources make it possible to easily identify and classify nonprofits. With the help of the project team, the decision was made to approach United Ways serving different counties in New Jersey, in a pilot effort to reach their member nonprofits.

HOW THE PROGRAM WORKS

Administration. JCP&L and DCEED each administer their own programs — JCP&L, its audit and rebate programs, and DCEED, its zero-interest loan program. The key innovation in this effort is that the programs are marketed jointly, to give nonprofits a more complete package of services and to offer "one-stop" convenience to participants.

The major steps in program operation are:

- A marketing workshop is organized in cooperation with a United Way or other nonprofit umbrella group.

- At the workshop, nonprofits are shown the benefits of energy efficiency investments and introduced to the JCP&L/DCEED program. They are given information materials and response cards.

- When a nonprofit signs up, JCP&L arranges an energy audit for its building. The results of the audit are presented to the nonprofit's management, with recommendations for retrofit projects and an explanation of the financing and incentives available from both the utility and the state.

- If the nonprofit decides to implement the recommended energy retrofits, JCP&L and DCEED representatives work together to "package" a project, using the utility's rebates and the state's subsidized loans to pay for up to 100% of the retrofit. JCP&L takes the lead in customer contact and in coordinating services.

- Once the project is installed, JCP&L enters the information on its audit database, and monitors billing records to assess the energy savings impact.

Type of Assistance. Nonprofits in the program receive several types of assistance:

- Energy audits from JCP&L.

- Management assistance in putting the financing together for the retrofit project.

- Rebates from JCP&L for purchasing electricity-saving equipment, including high efficiency lighting, air conditioning equipment, and heat pumps.
- Grants from JCP&L for the purchase of energy-saving electronic control systems.
- Zero-interest loans from DCEED, which can be used for a wide variety of retrofits.

Eligibility. JCP&L uses a very broad definition of nonprofit: it essentially covers any commercial-class customer with a nonprofit tax status. Since the broader mission of its programs is to reach the commercial customer class, and because its financial incentives are amply funded, it has little need to narrow eligibility requirements.

DCEED also employs a fairly broad eligibility criterion for the program. The only institutions it would not seek to serve would be the buildings of local governments, and schools and hospitals eligible for energy audits and grants under its Institutional Conservation Program (ICP).

To provide a clearer focus for the pilot effort, it was targeted primarily to health and human service agencies funded through United Ways. However, this was not translated into strict eligibility criteria.

Data Compilation and Analysis. There are two kinds of data being analyzed in this program. One is the more than 1,000 records of nonprofit JCP&L customers who have received energy audits. This database was used by Oak Ridge National Laboratory (ORNL) to develop profiles of energy use and energy savings potentials in New Jersey's nonprofit sector.

The other kind of data being analyzed in this program is from nonprofits who participate in the joint JCP&L/DCEED program. This database will include measured results from the buildings that receive retrofits in the program.

OUTCOMES

Market Penetration. Since this pilot program is still in progress, it is premature to estimate total market penetration of the joint JCP&L/DCEED program. However, JCP&L's

existing data on its commercial energy efficiency programs contain some interesting figures. JCP&L has a commercial customer base of more than 27,000 accounts, including for-profit and nonprofit organizations. It has conducted more than 1,900 energy audits in this customer class, for a total market penetration of about 7%. However, its commercial rebate and grant programs have attracted more than 4,000 customers, which is a 15% penetration rate. It is not clear how much overlap there is among these programs; presumably, there is substantial overlap between the audit programs and one or more of the incentive programs.

Looking at JCP&L's audit/rebate/grant programs as a whole, about 37% of the commercial customers participating have been nonprofits. However, in the audit program, 72% of recipients have been nonprofits; by contrast, the nonprofit share of the incentive programs ranged from 6% to 30%. The inference is that nonprofits are quite likely to request information (i.e., energy audits), but less likely to act on it.

DCEED has had more than 900 participants in its ICP aimed at schools, hospitals, and local governments. Its BEIP is much newer, and has processed a small number of loans to date.

The joint JCP&L/DCEED pilot program has worked with three United Ways, in Morris, Monmouth, and Ocean counties. The introductory workshops have generated 89 audit requests. It is too early to determine how many of these will implement the audit recommendations, or how much energy will be saved.

FUTURE DIRECTIONS

JCP&L and DCEED plan to hold more United Way workshops, and then to seek other nonprofit marketing channels such as YMCA's, religious organizations, or others that may arise.

The principal barriers to wider participation from nonprofits include:

- locating nonprofit networks that can be effective marketing channels;
- gaining senior management attention on energy issues sufficient to trigger participation in energy retrofit programs; and

- getting nonprofits to follow through with audit recommendations. While they show a high participation rate in audit programs, nonprofits have displayed a much lower rate of implementing retrofits.

This type of joint program appears to be replicable in any state that has:

- utilities with commercial energy audit and financial incentive programs
- a state energy office with financing programs open to nonprofits

CONTACTS FOR FURTHER INFORMATION

- Jersey Central Power and Light Company, Jack Sicsko, (201) 455-8676
- Department of Commerce, Energy, and Economic Development, Patricia Moscatello, (201) 648-3902.

2. OHIO: ENERGY SERVICES FOR NONPROFITS IN RURAL AREAS—THE COAD NONPROFIT BUILDING CONSERVATION PROGRAM

SUMMARY

This program is sponsored by the Ohio Department of Development, Office of Energy Conservation (OEC) and operated by the Corporation for Ohio Appalachian Development (COAD). Its most unique feature is that it aims to serve rural nonprofits, specifically those in Ohio's largely rural southeastern region.

Funded by a $300,000 grant from Ohio's share of the Petroleum Violation Escrow monies (commonly known as oil overcharge money), the program offers training workshops, energy audits, and zero-interest loans or rebates for implementing recommended retrofits.

THE DEVELOPMENT PROCESS

OEC has been active in developing new ways to deliver energy services to nonprofits. In recent years, it has created the Ohio Community Foundation Partnership Program (OCFPP), using oil overcharge funds. Using the Columbus Foundation as overall

coordinator, this initiative has provided funding, training, and other resources to eight community foundations in Ohio's metropolitan areas, who are in turn offering energy audits, loan/rebate financial incentives, and other services to nonprofits. More than $5.3 million has been allocated from oil overcharge funds for the program. Participating community foundations are to raise $1 in other funds for every $3 granted from the state. The foundations are employing United Ways and neighborhood groups as delegates to administer the program in each locality.

The COAD program arose from the need to reach nonprofits outside the state's metropolitan areas. Since the northern, central, and southwestern regions of the state are the most urbanized, this focused attention on the southeastern counties. COAD is a nonprofit organization providing a range of services to rural Ohio; it represents 17 community action agencies serving 30 counties in the southeastern portion of the state. It administers more than $12 million in energy efficiency programs ranging from low-income weatherization services to extensive furnace retrofit training.

COAD's constituent counties have a sparse network of social services; they lack the more complex community foundations, United Ways, and other channels that serve nonprofits in the metropolitan areas. COAD's involvement with nonprofit service networks in rural Ohio, plus its strong record of innovation in energy efficiency programs, made it a logical choice for operating this program.

In December 1988 COAD proposed a $300,000 effort to expand the OCFPP program into its service area. With help from OEC and the project team, the proposal was refined into a detailed program plan. Meetings in Columbus and Athens (COAD's home office location) resolved several key issues, including:

- Geographic distribution — The COAD service area is both large and sparsely populated, holding 1.2 million people in 30 counties, which is about a tenth of the state's population in about one-third of its land area. This presents a major challenge in delivering services in a timely fashion across a wide area. The chief options were to serve one limited area at a time, or to develop the program in several areas at once. In the interest of time, i.e. reaching the target population quickly, it was decided to launch promotion efforts in a series of workshops over a 3-4 month period.

- Types of financial assistance — In keeping with the rules that then governed the use of oil overcharge money, COAD had planned to offer interest subsidies on loans for energy retrofit projects. However, at the end of 1988 the DOE's rules changed to permit more flexibility in designing financial assistance mechanisms. As a result, the COAD program will offer nonprofits a choice of zero-interest loans or rebates.

HOW THE PROGRAM WORKS

Administration. COAD administers the program from its Athens office. OEC supervises use of grant funds and provides overall guidance for the program. An Advisory Committee comprised of COAD member agencies, utility representatives, lenders, OEC staff and the DOE project team provides advice on program design and operation. The principal steps in administering the program are:

- COAD develops information on nonprofits in its service area. This becomes the basis for recruiting agencies for the program.

- COAD schedules a series of four workshops over a 3-4 month period. Each workshop covers several counties; the entire series is designed to reach all the counties in the COAD service area.

- Nonprofits who attend the workshops and decide to participate in the program apply for energy audits. Once these applications are approved by OEC, COAD conducts the energy audits and presents the results to agency management.

- If the agency decides to implement the recommended energy retrofits, COAD offers it either a subsidized loan through a local bank or a rebate for direct purchase of the materials. To qualify for financial assistance, the agency must show that it is implementing the low-cost/no-cost items recommended in the audit. Fifty percent matching grants up to $500 will also be available for low-cost measures in agencies that demonstrate financial need. COAD intends to raise local funds in 1990 to fund these grants.

Types of Assistance. COAD provides several types of help to nonprofits in the program:

- Education on energy efficiency opportunities through COAD-run workshops.

- Comprehensive energy audits--COAD's methodology includes use of blower doors, thermography, and tests of furnace efficiency.

- Technical assistance in implementing low-cost measures, designing and contracting for retrofit equipment, locating and evaluating financing options.

- Financial assistance--Options include:

  - loan interest subsidies: the program buys down 100% of interest on loans of up to $10,000;

  - purchase rebates: the program will rebate 25% of the cost of energy conservation measures, with a cap of $2,500 in rebates per applicant;

  - small grants for energy retrofits: $500 in direct, 100% grants will be available for low-cost energy measures in agencies that demonstrate financial needs; this option is contingent on local fund raising efforts.

Eligibility. COAD established specific eligibility guidelines for the program. Participants must:

- Have a nonprofit tax exemption under section 501(c)(3) of the Internal Revenue Code;

- Be incorporated as a private nonprofit organization under Ohio law;

- Own or have a long-term lease on its facility, and pay utility bills directly;

- Be a social service provider ("social service" includes counseling, social development, temporary housing, food, job training, child care, legal aid, income transfer, recreation, mental health, and cultural/arts programs).

Facilities ineligible for the program include units of government, regional planning commissions, church sanctuaries (though other church facilities providing social services are eligible), schools, and hospitals.

Data Compilation and Analysis. Two kinds of data are being developed and analyzed in this program: data produced in other OCFPP programs, and data developed in the COAD program. ORNL staff researched the availability of background energy use data and post-retrofit energy savings data from several of the community foundations involved the OCFPP effort. ORNL staff also developed a data collection format for COAD to use in

gathering energy use data from participating agencies. This will provide a baseline for assessing the energy savings performance of retrofits completed in the program.

CUTCOMES

No overall assessment of market penetration is available, either for the OCFPP program as a whole or the COAD program in particular. Such an assessment is infeasible because there is no accurate source of information on the total population of nonprofits eligible for these programs. Notwithstanding, there appear to be more than enough interested participants to fully use the available funding — which is one positive outcome.

COAD's program has generated four workshops, from which 37 audit requests were received. Of the 11 agencies that indicated a preference for type of financial assistance, nine preferred rebates. COAD is in the process of completing the energy audits. Because the development cycle of the COAD program is not yet complete, no energy savings results have been measured to date.

COAD's (and the OEC's) goals and objectives for the nonprofit energy efficiency program were defined with the understanding that evaluation of the program is an important component of program planning. The success of the program is based on whether the goals and objectives have been attained. COAD discovered that program planners have begun to more prominently include systematic evaluation in program designs in order to quantify success. With the assistance of the OEC and ORNL, COAD established a protocol for management of the data that the program generated. The protocol included a description of four primary elements of data management:

> Specification. Conducted ideally in the program planning and development phase, data specification is the conceptualization and measurement of variables and data elements that are expected to be used in analysis. Data specification should be consistent with program goals as they are related to building and use features, including user characteristics, and to evaluation goals, which include defining the unit of analysis, scheduling activities, monitoring, and analysis. The issue of confidentiality and how to protect it should be defined when the data is specified.
>
> Collection. Data collection involves the identification of sources (audits, interviews, observations, energy records from the NPO or utility) The

identification of points of contact for the source data is important in order for data collection to be consistent at each stage of the process. If not previously pilot tested, the data collection instruments (forms, sheets, audits, etc.) should be validated early, in order to maximize data quality.

Processing. **Quality control** is the key to data management. In data processing, it is most important that records from multiple sources are properly matched and screened for anomalies. Establishing an audit trail — the record of methods, procedures, and decisions invoked during data processing — will aid in the continuity of data management.

Management. Specification, collection, and processing are all parts of data management. "Data management," as a distinct activity, refers to the management of software, files, libraries, and devices with which the data is managed. The effort necessary for post-program data management is based upon the prospects for extended use (how long will the data need to be retained?) and shared use (by whom?). Under data management, final documentation of the database is developed for each of the three primary stages of development: original source, processed stage, and analysis. Furthermore, confidentiality must be protected, both in principle and in the procedures under which the database is stored or transferred.

COAD further recognized that attention to detail ultimately determines whether a database actually assists, rather than hampers, a program manager or analyst.

FUTURE DIRECTIONS

COAD is exploring ways to raise local funds to provide leverage for the OEC grant. The hope is that the success of the first round of retrofits will raise the interest of other agencies and other funders, so that more agencies can be served.

The future of the COAD program is limited by two factors: locating and recruiting participants, and funding of financial incentives. More money must be raised to serve the unfunded agencies who showed interest in this first round. Then will come the challenge of recruiting and funding a wider base of nonprofits.

This program can be replicated in states that have a sizable population of rural nonprofits, a well-developed service delivery capability such as COAD's, and a source of startup funding.

CONTACTS FOR FURTHER INFORMATION

- Ohio Department of Development/Office of Energy Conservation, Marcy Rood, (614) 466-6797.
- Corporation for Ohio Appalachian Development, Christine Black, Roger McCauley, (614) 594-8499.

3. NEVADA: CIRCUIT RIDERS FOR NONPROFIT ENERGY EFFICIENCY PROGRAMS

SUMMARY

This program was created to meet the energy efficiency needs of Nevada's nonprofit social service agencies. The Nevada program is based on "circuit riders." The circuit riders (CRs) provide a flexible, comprehensive source of assistance for nonprofits. They reach out to nonprofits, making personal contact with management. They perform basic energy surveys, educate nonprofit staff on energy management practices, arrange for more detailed engineering studies, and help line up financing from various sources. This approach combines simplicity with flexibility, resulting in a workable, cost-effective program.

DEVELOPMENT PROCESS

The Nevada program began in 1988, when the state energy office funded CR positions within two nonprofit umbrella groups — the HELP Center of Southern Nevada (Las Vegas area) and the Community Services Agency of Washoe County (Reno area). The energy office funded this effort through the Energy Extension Service program, unlike the New Jersey and Ohio efforts which were funded from oil overcharge allocations.

The energy office viewed the possibility of assistance from the DOE project team as an opportunity to develop a more comprehensive, statewide nonprofit program. To gear up for a broader program, the energy office convened a steering committee with representatives from the HELP Center, the Washoe County CSA, the United Ways of Reno and Las Vegas, other agencies within the state's Office of Community Services, electric and gas utilities, the

state utility commission, and private energy service companies, as well as the DOE project team. The group met in December 1988 to work out a plan for the program. This plan went into operation in 1989, and the results are described below.

HOW THE PROGRAM WORKS

Administration. The Nevada Office of Community Services is responsible for general oversight and direction of the program. The day-to-day administration of the program is handled by the two CRs working out of the HELP Center of Southern Nevada and the Community Services Agency of Washoe County. The principal steps in the operation of the program are:

- The CRs develop promotional materials, as well as forms for gathering data on participating agencies, including their energy use patterns and savings potentials.

- Using the mailing list and other channels available to the nonprofit network organizations, the CRs establish contact with as many agencies as possible. The Office of Community Services supports this effort with seminars designed to both educate nonprofits on energy efficiency practices and make them aware of the various forms of assistance available to them.

- When an agency requests help through the program, the CR visits the facility and performs a preliminary energy survey. Based on this survey, he may recommend some measures directly, and may seek to arrange a more detailed engineering analysis.

- If a detailed engineering analysis is called for, the CR may go to one of the participating utilities, or to the Nevada Energy Management Institute, which is funded by the Office of Community Services to provide such detailed audits.

- If the agency decides to implement the measures recommended by the CR or the more detailed audit, the agency can pursue several avenues, ranging from limited grant funds available through the CRs to below-market financing from area banks.

Eligibility. The program is directed at nonprofit social service agencies; however, this criterion is not rigidly defined. As a matter of practice, the population most heavily recruited is the agencies served by or in touch with the HELP Center of Southern Nevada,

the Community Services Agency of Washoe County, and the United Ways in Reno and Las Vegas.

Types of Assistance. The assistance available to program participants consists of:

- Education, in the form of direct instruction from the CRs and workshops sponsored by the Office of Community Services.

- Energy surveys from the CRs, which identify operation and maintenance measures and retrofits not requiring detailed engineering analysis.

- Engineering analyses for more involved retrofit projects, performed by either the Nevada Energy Management Institute or one of the participating utilities.

- Financial assistance, which can be any of the following:

  - a limited pool of grant funds budgeted for the CRs by the Office of Community Services;

  - utility financial incentives such as rebates for energy efficient lighting;

  - donated materials from utilities, such as clock thermostats and insulation equipment;

  - other government programs, such as the Community Development Block Grant Program;

  - below-market financing from area banks, contingent on each bank's participation.

Data Compilation and Analysis. Little background data are available on nonprofits in Nevada. The program is not designed to do extensive data collection and analysis. It will produce some basic information on energy use patterns and savings potentials from the building studies performed by the CRs, the utilities, and the Energy Management Institute. When projects are implemented, the CRs will seek post-installation data to confirm the pre-installation estimates of energy savings.

OUTCOMES

No overall estimate is available of the total population eligible for the program. To date, 438 agencies have been contacted. Ninety-seven of these have requested assistance from the program. Thirty-three energy audits have been completed so far. Of the CRs' available grant funds, $20,185 — about 20% of the total available -- has been spent on retrofits. This money has leveraged an indeterminate amount of other financial assistance in the form of utility rebates and in-kind donations.

An overall assessment of energy savings potential for the program is not yet available. In the Reno area, an analysis of fourteen agencies' energy audit data showed projected annual energy savings totaling about $23,000. Comparing these savings with the $48,000 total cost of energy retrofits yields a simple payback projection of just over two years.

Post-installation energy savings data on most participating buildings are not yet available. One agency in the Reno area saw its summer electrical use drop by 32%, which was close to the 37% savings projected in the energy audit.

FUTURE DIRECTIONS

The program's major limitation is money to pay for retrofits. The nonprofit networks have been effective in recruiting agencies, and the CRs supported by the utilities and the Energy Management Institute have made progress in getting energy audits done. But the grant funds available to the program are very limited. While the in-kind contributions received to date are encouraging, the challenge is to get banks and other private-sector groups active in helping pay for worthwhile energy retrofits identified by the program.

The program is designed to keep the CRs in the field for some time. The major focus now is on finding ways to provide leverage for available funds, as well as new funding sources, so that participating nonprofits can implement the CRs' recommendations.

This program concept can work in a wide variety of locations. The key to success appears to be to put the CRs directly in the nonprofit network, where they have direct access to agencies and the administrative support of umbrella groups.

CONTACT FOR FURTHER INFORMATION

- Nevada Governor's Office of Community Services, Curtis Framel, (702) 687-4908.

CHAPTER 3

TWELVE NONPROFIT ENERGY EFFICIENCY PROGRAMS

OVERVIEW

Twelve energy efficiency programs that target nonprofit agencies are described in this section. These programs were selected for inclusion in this report because they employ program design and delivery mechanisms that appear to be particularly effective. The twelve programs are:

1. Colorado Energy Conservation Program
2. Energy Conservation Grant Program (Connecticut)
3. Florida Energy Conservation Program
4. Nonprofit Organization Energy Management Program (Iowa)
5. Kentucky Nonprofit Energy Conservation Program
6. Nonprofit Energy Efficiency Program (Massachusetts)
7. Community Foundation Energy Initiative (Michigan)
8. Senior Center Energy Conservation Program (Michigan)
9. New Hampshire Energy Conservation Grants for Nonprofits
10. New York Energy Conservation Program
11. New York Grant Program
12. Energy Savings for Nonprofits (Washington)

Detailed profiles of the first eleven of these programs were prepared. It was not possible to finalize a profile of the twelfth program; however, it is included in the following five summary tables and it contributed to the discussion that follows.

Table 1 is a listing of the organizations that administered the program in each state, the resources that were dedicated to the nonprofit programs and the barriers to full market penetration. The principal program managers or participants were, State Energy Offices.

Table 1. Organizations and resources involved in energy conservation programs for nonprofits

	Administering Organization (and Other Players)	Resources	Barriers to Full Market Penetration
Colorado	State Energy Office (SEO)	PVE* $500K	• lack of funds and lack of interest in loans • personnel turnover • lack of interest by NPO umbrella org.
Connecticut	SEO (Foundations, United Way of Connecticut, UWA**, utilities, Nonprofit Energy Council)	PVE $2M	• lack of funds
Florida	United Way of FL (SEO, Local UWs)	SEO $138K	• SEO personnel turnover
Iowa	UW of Iowa with Iowa P & L (SEO)	PVE $70K Solar Bank $27K	• marketing to target • UW personnel turnover
Kentucky	UW of Kentucky (Metro UW, SEO)	Federal SECP/EES, WAP***, Metro UW	• limited funding • restrictions on funding
Massachusetts	Regional Program Operators (SEO, Community Energy Partnership)	Stripper Well $5M Louisiana First Use Tax Fund $250K	• process is labor intensive • SEO staff turnover
Michigan-CFEI	Council of Michigan Foundations (CMF)	PVE $3M CMF $3M (match)	• lack of experience with federal reg's and energy conservation
Michigan-SCECP	Michigan Office of Services to the Aged	Stripper Well $2M	• conflict of goals between conservation and seniors
New Hampshire	SEO (Charitable Fund of New Hampshire)	PVE $500K	• lack of funding • unable to identify eligibles
New York-ECP	15 Community Foundations (New York Community Trust, SEO)	PVE $15M	• restriction on funds • learning curve and staff turnover
New York-GP	SEO (United Way of New York, Salvation Army, Red Cross)	Stripper well $3M	• demand for program is too large
Washington	SEO (utilities, UWA)	PVE $850K	• contractors uninterested in small jobs • inability to solicit bids

*PVE = Petroleum Violation Escrow fund
**UWA = United Way of America, UW = United Way
***WAP = Weatherization Assistance Program

Besides SEO's, United Ways, utility companies and foundations were major parties to program operations. Others include a state office on Aging, The Salvation Army and The Red Cross.

Resources ranged from a low of $27,000 to $15 million. Many of the state programs required some sort of match or local funds to be added to the state subsidy. In Michigan and New York, for example, the foundations were required to match (dollar for dollar) the state funds. The major source of funds in most cases were PVE and Stripper Well. Other sources included SEO funds, SECP/EES, Solar Bank or state dollars.

The major barriers to full program participation (based on interviews with program managers) were lack of, or limitations on, the use of funds in six states; and personnel turnover or intensity of labor in the program process in seven locations.

Only one state identified the inability to locate eligible nonprofit agencies to participate as a problem and one state claimed that the demand for services was too large to handle. In Washington, the conservation installation jobs were often considered too small for contractors to bid on.

Table 2 is a matrix of the major characteristics of the programs we studied for each state-sponsored program. Across the top of the table we indicate the program services that were made available to participating nonprofit agencies, as follows:

- audits;
- direct technical assistance;
- workshops;
- loans or loan subsidies;
- grants;
- rebates;
- brokering or "hand holding;"
- utility-based financing; and
- cooperative purchase agreements.

We tried to determine whether the success of the programs is attributable to any of the service components, either singly or in combinations. Which program components contribute to program success, and are there any service components that an SEO should consider including to promote program success?

Table 2. Services and financing provided by energy conservation programs for nonprofits

	Service								
	Audits	Direct Technical Assis-tance	Work-shops	Loans or Subsidies	Grants	Rebates	Brokering or Hand Holding	Utility Financing	Cooperative Purchase Agreements
Colorado	Yes	Yes		Yes					
Connecticut	Yes	Yes			Yes		Yes		
Florida		Yes	Yes						
Iowa	Yes	Yes	Yes					Yes[1]	
Kentucky	Yes	Yes	Yes				Yes		
Massachusetts	Yes	Yes			Yes		Yes		
Michigan-CFEI	Yes	Yes	Yes	Yes	Yes				
Michigan-SCECP	Yes				Yes				
New Hampshire					Yes				
New York-ECP	Yes	Yes	Yes	Yes		Yes	Yes		Yes
New York-GP	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
Washington	Yes	Yes	Yes	Yes	Yes		Yes	Yes	
TOTALS	10	10	7	5	7	2	6	2	1

[1] Utility financing is reimbursed as energy is saved.

Of the 12 programs studied, ten offer audits and ten offer direct technical assistance. It is fair to say that some type of audit and some sort of technical assistance are essential characteristics of any energy program. Seven programs sponsored workshops as a core service and seven offered grants. Six programs made available what we have identified as "hand-holding" or brokering, and five offered loans or loan subsidies.

Only New York offered all of the services mentioned here, while Michigan and Washington each offered most of them. Except New Hampshire, every state program offered either audits or technical assistance. Unfortunately, we did not develop a method to compare the relative success of programs and therefore cannot advise on which of the services offered is the most powerful guarantee of success. Our experience indicates that some type of audit or survey must be provided by the program. Technical assistance is also usually important to achieving the desired retrofit installations and ongoing maintenance.

All of the 12 programs require that participating agencies have 501(c)(3) tax status (Table 3). In addition, nine of the programs are available only to health and human service agencies, and five have limited geographic scope.

The twelve programs use a variety of different mechanisms to market energy conservation programs (Table 4). Most common is the use of an umbrella organization such as a United Way to provide publicity. Workshops and mailings are also used by a majority of the programs to generate participation.

Table 5 summarizes program outcomes and prospects for energy programs for nonprofits. No trends seem to emerge from the outcomes column, since it describes specific accomplishments in each state. Depending upon legislative action or other decisions to continue funding, it appears that at least eight of the programs studied will continue to operate in some form.

We also examined the replicability requirements for the programs and no trend or pattern emerged. The most common requirements are:

- heavy SEO staff involvement;
- need for strong leadership and a good network or strong umbrella organization for agencies;
- utility company willingness and capability to invest in nonprofit conservation programs;

- creation of an "ICP-type" program.

The 12 profiles of existing programs are provided in Appendix A.

Table 3. Eligibility requirements for participation in energy conservation programs for nonprofits

	501(c)(3)	Geographic Area (if restricted)	Small Services	Health and Human Services Only
Colorado	Yes	Denver, Boulder, and Colorado Springs		
Connecticut	Yes			Yes
Florida	Yes		Yes	
Iowa	Yes	Iowa Power and Light region		Yes
Kentucky	Yes	De facto restriction to two metropolitan areas		Yes
Massachusetts	Yes			Yes
Michigan-CFEI	Yes	Area served by Council of Michigan Foundations		Yes
Michigan-SCECP	Yes	Area served by utility and senior centers		
New Hampshire	Yes			Yes
New York-ECP	Yes			Yes
New York-GP	Yes			Yes
Washington	Yes			Yes
TOTALS	12	5	1	9

Table 4. Mechanisms used to market energy conservation programs for nonprofits

	Direct Mail	Umbrella Group Publicity	Utility Publicity or Contact	Personal Contact	Work-shops
Colorado	Yes	Yes			Yes
Connecticut	Yes	Yes	Yes		Yes
Florida		Yes			
Iowa		Yes			Yes
Kentucky		Yes		Yes	Yes
Massachusetts	Yes	Yes		Yes	Yes
Michigan-CFEI	Yes	Yes		Yes	Yes
Michigan-SCECP		Yes			
New Hampshire	Yes	Yes			
New York-ECP	Yes	Yes	Yes		Yes
New York-GP	Yes	Yes	Yes		Yes
Washington	Yes	Yes	Yes	Yes	Yes
TOTALS	8	12	4	4	9

Table 5. Outcomes and prospects for energy conservation programs for nonprofits

	Outcomes	Future Directions	Replicability Requirements
Colorado	•10 audit requests •$150 K of loans (out of $500 K set aside for program)	•the program was a "one-shot" deal and won't be continued	
Connecticut	•23 small buildings and 4-6 large buildings have been approved for participation	•depends on continued availability of PVE* funds	•an ICP-style program •heavy SEO staff involvement •NPO umbrella and utility investment
Florida	•workshops in 6 locations	•a commercial loan program is planned	•mechanisms for strong recruitment of participants
Iowa	•in the process of finalizing several initial projects	•the program may expand to other utilities	•strong UW leadership •utility interested in conservation
Kentucky	•participation is strong in Louisville and Lexington, but not elsewhere	•expansion of the program is under discussion	•existence of a network to assist in the delivery process
Massachussetts	•100 projects are in the pipeline •progress has been slow	•program is being simplified and may be discontinued	•existence of strong network within communities
Michigan-CFEI Michigan-SCECP	•results vary greatly		•utility audit capability •senior center network
New Hampshire	•70 grants awarded •many YMCAs and shelters •100 churches applied, but none were funded	•the program is becoming more formalized and will continue	•NPO umbrella for effective outreach
New York-ECP	•31 boiler cleanings/tune-ups •9 Technical Assistance Studies •60 workshops with 1100-1200 attendees	•program continuation being considered by legislature	•urbanized state with well-developed network of philanthropic organizations
New York-GP	•all available funds have been allocated to 260 organizations ($2.4 M) •applications for $5.4 M received	•program's future depends upon legislative action	•an ICP-style program
Washington	•134 NPOs served to date •$180 K annual savings	•expansion is underway to cover entire state	•strong SEO commitment •civic-minded utilities

*PVE = Petroleum Violation Escrow

CHAPTER 4

CONCLUSIONS

The results of the three model programs provide much useful information for analysis, both in the specific details and in the general conclusions which can be drawn. The following "replicability factors" were derived from examination of the three model programs and the 12 ongoing state programs. These factors should be taken into account when establishing and designing new state programs.

- For a program to be successful, at least one organization must act as a "champion;" that is, be willing to spearhead the effort to launch a joint program.
- SEOs administer half of the programs studied here. It is difficult for SEOs to sustain successful programs without partners. Utility companies, in those communities where they are willing to invest time and resources, are extraordinarily effective partners.
- Highly centralized programs are not as successful as more dispersed programs; staff members who travel and assist with day-to-day operations are very useful.
- We believe that the more varied or comprehensive the services offered, the more successful the program will be — but only if sufficient resources are available to support a broad array of services.
- Effective marketing is essential; good methods to inform agencies of the availability of services and a good system to attract agencies into the program are important.
- Strong existing networks contribute to success. The key networks vary in nature: NPO umbrella groups, senior center networks, information and referral services, and United Ways are all viable systems.
- Funding for programs and nonprofits is insufficient relative to the potential savings and the need.
- Programs that have relied primarily on PVE, Exxon, and Stripper Well restitution for funds are now in jeopardy. Programs with other sources are continuing and may be expanding.

- There is little monitoring or evaluation of the progress and impacts of nonprofit energy conservation programs, and such evaluation may be critical if NPO programs are to attract continuation or expansion funding.

APPENDIX A

1. COLORADO

PURPOSE OF PROGRAM

The Colorado Energy Conservation Program for nonprofit groups used a revolving fund to provide low-interest loans to organizations providing essential human services and have suffered from cutbacks in the Community Development Block Grant (CDBG) program.

DESCRIPTION OF PROGRAM

The State Energy Conservation Office (SECO), which is completely funded by federal resources, provided a comprehensive package for nonprofit groups to use in participating in the program. Nonprofit groups were required only to agree to take on the indebtedness for the loan. $500,000 was set aside from Exxon Petroleum Violation Escrow account (PVE) funds.

THE DEVELOPMENT PROCESS

Brief History. The SECO, in July 1988, started its institutional loan program after attempts in previous years to reach the nonprofit community had met with limited success. The loan program represented the first time the state office had committed financial resources to energy conservation measures (ECMs) for nonprofits. Prior to this program, efforts focused on technical assistance and education.

Key Players. Officials within the Colorado SECO were the key players in formulating, advertising, and executing the program. United Way of America (UWA) provided initial consulting and information on how to set up a nonprofit program.

Major Obstacles. A lack of interest by eligible organizations was the primary problem confronting the program. The nonprofit organizations were concerned about taking on additional debt, and lacked the time or resources to put into an energy conservation plan.

HOW THE PROGRAM OPERATES

Administration. The SECO administers the institutional loan program which provides low-interest loans (4-8% interest rates) to nonprofit groups. The program focused on those

groups that provide "essential human services," such as halfway houses, youth shelters, homes for battered woman and the homeless. The state tried to give priority to groups that bore the brunt of cuts in the CDBG.

The state used the list of nonprofit groups registered with the state, but focused on direct mail to encourage participation. Additional lists were obtained from private foundations and local United Ways. The mailing informed the groups that the state would conduct the initial energy audit and technical assessment.

The state also assured potential applicants that it would be available to "hold your hand" through the process, providing expert advise on suitable conservation measures and dealing with contractors. A state official notes that the office may be unique in that it employs several engineers who are available to assist agencies.

Participating organizations had to express interest by returning an initial application included in the direct mailing effort by the Fall of 1988. However, the program office accepted applications past the announced deadline. Furthermore, applicants had to agree to undertake the indebtedness that stemmed from the loan; the loans were not guaranteed by the state. The state office conducts on-site inspections to insure that projects are being completed.

Financing. The loan money was obtained through the state's allotment from the Exxon PVE account.

Eligibility. The state identified eligible groups through its list of registered nonprofit organizations, which was supplemented with lists from some private foundations. The program, tried to give preference to organizations that "had fallen between the cracks" as a result of funding reductions in CDBGs.

Recruitment. The state contacted potential participants through a direct mail campaign. The program contacted groups throughout the state and primarily located in the Boulder, Colorado Springs, and Denver areas. A half-day workshop was offered in Denver just prior to the closure date.

Type of Assistance. The program provided all services necessary to groups wanting to participate, including audits, technical assessments, and aid in dealing with contractors.

Loans were capped at $50,000 per group and measures had to have projected payback of no more than 10 years.

DATA AND OUTCOMES

Out of the hundreds of pieces of direct mail to the targeted groups, only 10 nonprofits requested audits. The SECO was disappointed with the response given that it was prepared to take care of all the technical aspects of the energy improvements. The program expects to lend only approximately $150,000 out of the $500,000 set aside for the program.

FUTURE DIRECTIONS

The loan program was a "one-shot" deal, and program officials do not anticipate further action for the foreseeable future.

CONTACT FOR FURTHER INFORMATION

- Colorado State Energy Conservation Office, 112 East 14th Street, Denver, Colorado 80203; Bob Westby, Assistant Managing Director for Technical Services, (303) 894-2144.

2. CONNECTICUT

PURPOSE OF PROGRAM

The two-phase Energy Conservation Grant Program for nonprofit and public care institutions aids nonprofit and public care organizations in reducing energy consumption through conservation.

DESCRIPTION OF PROGRAM

The program, administered by the Connecticut Office of Policy and Management (OPM), Energy Division, has two phases. Phase I provides assistance to "small" buildings, under 10,000 square feet, while Phase II deals with "large" buildings over 10,000 square feet and small buildings requiring complex ECMs. Eligible organizations participate in the program through an application process.

The programs expand on the Institutional Conservation Program (ICP), a program designed and funded on a matching basis by the U.S. Department of Energy. The ICP focuses on energy efficiency in schools and hospitals.

The nonprofit program is the only state program available to nonprofit organizations for energy-related capital improvements. Another source, which is private, is the Connecticut Energy Foundation, sponsored by the Connecticut Natural Gas Company. The foundation, however, has limited resources. Nonprofit organizations can also take advantage of some of the other utilities' commercial conservation programs which include weatherization, energy audits, and shared savings arrangements.

THE DEVELOPMENT PROCESS

Brief History. The state of Connecticut started the program with funds available from the PVE account because it recognized that energy conservation in the nonprofit sector was one of the few areas not addressed as part of its overall energy conservation strategy.

The State Government provided approximately $1.5 million from its PVE allocation to conduct operations from 1987 through 1989. Availability of funding was announced publicly in June 1987.

When the program was developed in 1987 an advisory council was established to determine the goals and direction of the program. Representatives from local foundations, including the Hartford Foundation, the New Haven Foundation, United Way of Connecticut and UWA, local utilities, and the Nonprofit Energy Council served on the advisory council.

Key Players. Members of the advisory council played a key role in the program, not only in providing direction, but also in publicizing the program. For example, United Illuminating in New Haven helped publicize the program through its customer newsletter for nonprofits.

Major Obstacles. The project is limited by the availability of funds. Currently, the state funds the program through its PVE allocation and is considering whether to continue the program after the $1.5 million is expended.

Uncertainty over the state's next allocation of PVE funds from the Federal Government, and competition in the state for those funds from other energy programs are serious obstacles to the continuation of the program past 1989. A decision is still pending within the State Government.

HOW THE PROGRAM OPERATES

Administration. The program is administered by the Connecticut OPM Energy Division. For Phase I small buildings (10,000 square feet or fewer) must have had a Commercial and Apartment Conservation Service energy audit conducted by one of the four major utility companies within two years of application to qualify for an ECM grant. Audits conducted more than than two years ago must be updated. Additionally, the applicant must submit a letter from the Internal Revenue Service (IRS) confirming the organization's status as a 501(c)(3) charitable organization. Applications are accepted on a continuous basis until the program funds are committed.

For Phase II, large buildings (more than 10,000 square feet or smaller buildings requiring complex measures), organizations must submit the application, an energy audit, employment information data and IRS documentation.

Organizations must submit a technical assistance report that will be used in evaluating proposals. Technical assistance grants are also available. The program establishes deadlines

for the applications and provides funding on a competitive basis. Priority is given the most energy-inefficient buildings and for measures with the highest rate of return on investment.

Financing. The program is funded entirely through the PVE account.

Eligibility. Phase I and Phase II grants are open to the following nonprofit organizations with 501(c)(3) status: human service agencies, cultural organizations, day care centers, public libraries that receive less than 40% of their operating funds from a municipality, group homes, transitional housing units that are not eligible for the Connecticut Department of Housing energy program, shelters that are not eligible for the Connecticut Department of Human Resources energy program, and nonprofit elderly housing corporations. Also eligible are public care facilities--both for-profit and not-for-profit--licensed by the state as skilled nursing facilities and intermediate care facilities or homes for the aged.

Recruitment. Interest in the program took about six months to develop after the June 1987 announcement. Participation was solicited in several ways.

- Articles were published in nonprofit newsletters, including United Way of Connecticut publications. The major utilities also made eligible organizations aware of the program through their customer newsletters.

- Mailings were sent to 4,000 nonprofit organizations and public care institutions alerting them to the availability of funds.

- The OPM Energy Division also conducted two informational seminars on how to apply for assistance. Both seminars were held in the central portion of the state (Chester and Wallingford) to further advertise the program.

Type of Assistance. Approximately $1.0 million has been allocated for ECM grants. The remaining $550,000 has been used for technical assistance grants.

<u>Phase I assistance</u>

- ECM grants.

  The maximum grant amount for this 50% matching grants program is $7,500. A limited amount of hardship funding is available if hardship status is approved, providing up to 75% funding. Grants are for a two-year period.

  Projects which can be funded must be able to show a payback period of one-to-seven years. These measures include: vent dampers, heating burners and boilers; clock thermostats; destratification fans; ceiling, floor, sidewall, duct, pipe and

water heater insulation; lighting system replacements; window and door system modifications; installation of vestibule entries; and weatherstripping and caulking.

- Hardship funding.

  Funding of up to 75% of project costs is available for hardship cases. Hardship is based on a ratio of an organization's energy expenses to its operating expenses and based on the organization's financial condition.

Phase II assistance

- Technical assistance report grant.

  The state pays 75% of the cost of technical assistance reports, which are prepared by OPM's consultant engineering firm. The report's cost is based on 11.6 cents per square foot.

- ECM grants.

  Projects qualifying under Phase I are also eligible for funding under Phase II. Eligible measures include: air conditioner replacements; automated energy control systems; energy recovery systems; furnace, boiler and distribution system efficiency modifications or replacements; passive solar space heating and cooling systems; domestic active solar hot water systems; and cogeneration systems. Grants are capped at $50,000 per building.

- Credit measures.

  Measures installed after the technical assistance report was completed may be eligible for credit, however, these measures must have been recommended in the report and must meet all other relevant criteria for funding in the program.

- Consultation services.

  The state will pay for 100% of consultation costs with the state's consulting engineering firm. Included in this service are reviews of the technical assistance report, assistance in completing the ECM application, ECM implementation and assistance in preparing bid documents and evaluating bids.

DATA

No data are available yet, but an extensive review is underway after two cycles (years). A preliminary cost-benefit analysis will be completed by January 1990. Officials say

the program has been successful; it benefits both the state and the nonprofit and public care organizations by helping reduce the state's total energy consumption and decrease the organizations' operating costs. As a result of the reduced energy costs, these nonprofit and public care organizations will have more dollars available for human and social services.

The payback period has been less than five years for funded projects.

OUTCOMES

Market Penetration. Rates aren't available. The program has gone through only two cycles, however, 23 small buildings and 46 large buildings have been approved. YMCAs and YWCAs, as well as other human service organizations, such as Boys Clubs and Girls Clubs have taken advantage of the program in greater numbers as opposed to libraries or group homes.

FUTURE DIRECTIONS

Applications for the Phase I program were accepted until December 1988 and the Phase II program accepted applications until April 1989. The program's future depends on the continued availability of PVE funding.

CONTACT FOR FURTHER INFORMATION

- Office of Policy and Management, Energy Division, 80 Washington Street, Hartford, Connecticut; Lisa Secondo, Planning Analyst, (203) 566-2800.

3. FLORIDA

PURPOSE OF PROGRAM

The purpose of the program is to promote energy conservation among nonprofit organizations affiliated with the United Way of Florida (UWF) through half-day seminars. The seminars presented information on how to read utility bills and energy consumption histories, and other energy-related subjects.

DESCRIPTION OF PROGRAM

The program was administered by UWF which provides half-day seminars in conjunction with local utilities and local United Way organizations.

THE DEVELOPMENT PROCESS

Brief History. Many United Way agencies in Florida were not experienced in energy conservation. Consequently, UWF with assistance of UWA, approached the State Government for funds in early 1988. UWF was attractive to Florida as a program administrator because of its broad-based membership across the state.

Key Players. The key players were the UWF and the Governor's Energy Office.

HOW THE PROGRAM OPERATES

Administration. The program is administered by the UWF, which contacts local United Way directors to set up local seminars. Representatives of nonprofit agencies are invited to participate in the seminars.

Financing. The state provides funding from the PVE account for expenses in conducting the seminars. The program received $80,000 to operate from March 10, 1988 through March 30, 1989, $130,000 from the state, and $50,000 for operations running from April 10, 1989 through Nov. 30, 1989.

Eligibility. All nonprofits and small for-profit businesses.

OUTCOMES

More than 380 persons from 340 organizations attended a series of 21 workshops given all over the state since the beginning of the program.

FUTURE DIRECTIONS

The state is planning to start a commercial loan program to cater to the "smallest of the small" organizations, both for-profit and nonprofit. The program is expected to be conducted in conjunction with the the Small Business Development Centers which are university-based programs funded by the U.S. Small Business Administration. The state anticipates offering low loans ranging from $1,000 to $25,000.

CONTACTS FOR FURTHER INFORMATION

- United Ways of Florida, Inc., 307 East 7th Avenue, Suite 204, Tallahassee, Florida 32303; Joseph A. Reno, Executive Director, (904)681-9292.

- Governor's Energy Office, 214 South Bronough Street, Tallahassee, Florida 32399-0001; Henry H. Erikson, Senior Governmental Analyst, (904)488-2475.

4. IOWA

PURPOSE OF PROGRAM

The Nonprofit Organization Energy Management Program was created to develop a comprehensive energy management program for nonprofit organizations in Iowa.

DESCRIPTION OF PROGRAM

The program provides nonprofit organizations located in the service territory of Iowa Power (IP) (Des Moines metropolitan area) with financing for cost-effective energy management improvements. Cost-effective energy management improvements mean those improvements with an aggregate six-year or less payback and identified in an approved energy audit or technical engineering analysis. IP agreed to serve as the "financial institution" for nonprofits in their service territory. The "loans" are repaid with energy savings. IP will guarantee cash flow neutrality for three years under this program and offers a shared savings component for energy savings in excess of the loan repayment obligation. In addition, the nonprofit organization, if eligible, has access to the Solar Energy and Energy Conservation Bank funds. This "bank" provides grants of 20% up to $5,000 per nonprofit agency for energy improvements.

THE DEVELOPMENT PROCESS

Brief History. The program started with a suggestion and offer of assistance from UWA, as a joint effort between the Iowa Department of Natural Resources (DNR) and United Way of Iowa (UWI). UWI received $70,000 from the DNR to develop a comprehensive energy management program for nonprofits and to identify a viable financing mechanism for cost-effective improvements. Part of the funds were used to fund approximately 100 walk-through energy audits in nonprofit agencies. The program was initiated in February of 1988.

Key Players. The key players are the UWI and IP. IP hired The Energy Group(TEG) to coordinate and monitor the program.

Major Obstacles. Like many energy management programs, soliciting nonprofit organization's participation in the program has been a time-consuming effort.

HOW THE PROGRAM OPERATES

Administration. UWI, IP, and TEG all have significant roles in administering the program. The utility and UWI identify nonprofit organizations as potential participants. The utility offers to pay for the measures it considers cost effective as outlined in an energy audit or technical engineering analysis.

A case-by-case determination is made on financing measures. The utility liaison, TEG, meets with the nonprofits to help fill out forms and aid in the identification of projects which will be funded. Once the nonprofit organization has received approval from its appropriate governing body, it will enter into a contract with IP for the financing of the improvements.

Financing. The original technical engineering analyses and energy audits, which included organizations outside of IP's service territory, were funded with Exxon money. Approximately $25,000 of Solar Energy and Energy Conservation Bank funds are available to nonprofit organizations until June 1990. Solar Bank funds vary from year to year depending upon federal availability.

Eligibility. Nonprofit organizations are eligible to participate if they are in the IP service territory. Currently, the emphasis of this program is being directed at United Way-affiliated agencies such as the Red Cross.

Recruitment. The UWI contacted each of the agencies with an informational mailing about the program. TEG and IP representatives conducted follow-up visits to further explain the program.

Type of Assistance. The utility will pay for all conservation measures it deems appropriate. The recipient pays nothing up front. However, energy savings realized from the measures are paid to the utility until the costs of the measures are recouped. Again, IP will guarantee cash flow neutrality for three years and offers a shared savings component for excess savings.

TEG, the utility's liaison with the nonprofit organizations in the Des Moines area, will aid the agency throughout the entire process.

OUTCOMES

The program is in the midst of finalizing commitments from the nonprofit organizations and contracts are expected to be executed early in 1990.

FUTURE DIRECTIONS

UWI and TEG are attempting to duplicate the program with other utilities in the state.

CONTACTS FOR FURTHER INFORMATION

- The Energy Group Co., 100 E. Grand, #195, Des Moines, Iowa 50309; Warren Hunsberger, (515)283-9399.

- Conservation Services, Post Office Box 657, Des Moines, Iowa 50303; Jeff Newburn, Manager, (515)281-2368.

- Iowa Department of Natural Resources, Building Energy Management Section, 4th Floor, Wallace Building, Des Moines, Iowa 50309; Sharon A. Tahtinen, Development Unit Leader, (515) 281-7066.

5. KENTUCKY

PURPOSE OF THE PROGRAM

The Kentucky Nonprofit Energy Conservation Program assists nonprofit health and human services organizations to become more energy-efficient.

DESCRIPTION OF PROGRAM

The program is administered by United Way of Kentucky (UWK) which employs one person as a "Circuit Rider." The Circuit Rider (CR) brings energy technology to agencies in at least six communities in the state, primarily through, but not limited to, local United Ways. At the state level a task force oversees the project; local task forces have been formed in two of the participating communities, Louisville and Lexington. The CR arranges for or conducts energy audits, arranges limited financing, conducts workshops and either personally installs or arranges for installation of conservation measures. He also tracks energy savings.

The Kentucky Energy Cabinet (Kentucky's State Energy Office) administratively funded the program for three years, through the Energy Extension Service (EES) and the Kentucky Cabinet for Human Resources added Weatherization Assistance Program (WAP) resources during one year. UWK and Metro United Way (Louisville) provide support functions and space.

THE DEVELOPMENT PROCESS

Brief History. The idea that the Kentucky Energy Cabinet should offer aid to nonprofit agencies first emerged during the DOE 1985 All States Program Manager's Meeting. UWA presented the need for aid for nonprofits, and Kentucky was the first state to express direct interest.

The idea was also presented at UWA to representatives of state United Way Associations; again a representative from Kentucky expressed interest. UWA and the state Energy Office (SEO) were requested by UWK to present the issues and potential to the UWK Board in Louisville in April 1986. The SEO said it might be able to make limited funds

available if United Way of Kentucky were to commit itself to this project and submit a proposal.

Key Players. Key players are the CR, the Director of UWK, and several staff members of the Kentucky Energy Cabinet. Others that have played a less visible but important role are UWK board and committee members and the executives of the local United Ways in each community targeted for assistance.

The most critical player was the Executive Director of the United Way of Louisville who at the first meeting in Louisville in April 1986 committed himself and his agency to the project. Because of his prestige amongst the other United Way directors, the project became successful.

Major Obstacles. This project has no serious obstacles. It experienced a slow start because the concept was new. Funding, while secure, has been relatively limited, and the UWK has always had to be creative in developing local resources for ECMs.

EES funding provided by the Energy Cabinet is limited by statute to administrative and programmatic expenses; weatherization expenses are prohibited, thus, other resources must be utilized for ECMs.

HOW THE PROGRAM OPERATES

Administration. The program, directly administered by the CR who is employed by UWK, is supervised by the Executive Director. UWK has an energy conservation task force. UWK/CR report to the Energy Cabinet as part of their EES program.

The application process is informal. No formal applications are required, although agencies must express their interest in having conservation work done on their facility.

UWK announces the availability of energy conservation services and the CR generally makes personal contact with agency management. Once interest is expressed, the CR analyzes, or arranges for an analysis of, the facility's needs. The CR generally carries out the conservation work necessary, locating resources from the local United Way, the agencies, or other community sources. The CR also conducts workshops and provides other educational services to agency personnel.

Financing. The overall program is financed by the SEO with additional contributions from the Kentucky Cabinet for Human Resources and in-kind support from UWK and several local United Ways. SEO and UWK have occasionally procured donated materials (e.g., caulk, weatherstripping, thermostats, insulation).

Eligibility. Any nonprofit health and human services agency is eligible for services. While primary contact has been via local United Ways, other agencies are also invited to participate.

Recruitment. Agencies are informed of the project by letter from the CR and by letters from the local United Way. In addition, the CR visits agencies to invite their participation.

Type of Assistance. No direct funding or loans are available from the program. The CR has assisted agencies to locate funding locally, or agencies have utilized their own resources to pay for measures; a one-time grant from the Cabinet for Human Resources as made from Low-Income Home Energy Assistance Program (LIHEAP) 15% set-aside overcharge funds for shelters.

Audits have been conducted for the most part by the CR with additional audits by utility representatives.

Training is done by the CR. Workshops have been held in each community, and these are supplemented by in-agency training sessions.

Data. The CR has collected and can make available data on energy utilization of each agency served, amounts spent on conservation measures, and post retrofit energy use. As of this writing, no aggregate analysis has been conducted.

OUTCOMES

Market penetration rate information is not available.

The program is operated primarily in Louisville and Lexington due to funding and time limits. There has been limited participation in several other locations. Anecdotal information is being compiled by the CR.

FUTURE DIRECTIONS

Hurdles include how to obtain more funds from expensive measures and how to multiply the impact of one staff person.

Next steps: the UWK and SEO have decided to continue the project, but are debating whether to expand. Also being discussed are methods to extend the impact and influence to more agencies.

This program is easily replicable in other states.

No other state has an identical project. Florida and Iowa have contracted with state United Ways to provide similar CR-type programs, although, at least at the outset, emphasis has been on audits rather than ECMs. The state of Nevada SEO directly employs CRs.

Nevada has also made a limited fund available to pay for ECMs.

CONTACT FOR FURTHER INFORMATION

- Kentucky Energy Office, Lana Rogers or Greg Gaess, (502) 564-7192.
- United Way of Kentucky, Walter Bell, (502) 589-6897.

6. MASSACHUSETTS

PURPOSE OF PROGRAM

The Nonprofit Energy Efficiency Program (NEEP) provides grants to assist nonprofit organizations with 501(c)(3) status to reduce energy costs and increase energy efficiency to free funds for the organizations central mission and reduce energy consumption.

DESCRIPTION OF PROGRAM

Through a network of regional program operators (RPOs) and the Community Energy Partnership, NEEP provides a comprehensive energy conservation program for nonprofits, providing hands-on help for organizations in determining conservation measures and applying for grants to fund their execution. The program supports a wide range of conservation measures from simple weather stripping to enhancing energy efficiency in major building rehabilitations.

THE DEVELOPMENT PROCESS

Brief History. The state had been considering conservation programs for nonprofits for several years to fill the vacuum created by disinterest by utilities and foundations. With the receipt of $5 million in PVE account funds from the Kansas Stripper Well Kansas Stripper Well program, the state decided to create a program. The state Energy Resources office started planning a program during the spring and summer of 1988 with the hope of initiating the program by July 1988. However, the deadline slipped, and the program did not begin until November 1988.

Key Players. The Office of Energy Resources is responsible for NEEP. It administers the program through an agreement with a nonprofit consortium of energy conservation groups known as the Community Energy Partnership (CEP). The CEP in turn subcontracted with nine energy conservation groups to act as RPOs, which service the client population throughout the state. One RPO has concentrated on major rehabilitation projects as a backup to the other RPOs. These RPOs provide comprehensive assistance to clients, ranging from

aid in filing applications to support in overseeing the implementation of funded conservation measures.

Major Obstacles. Because the program is resource and personnel intensive, its capacity to take on projects is constrained. RPOs can spend a great amount of time guiding clients through the process.

Another problem is convincing nonprofits to take part because they are wary of taking on new debt.

HOW THE PROGRAM OPERATES

Administration. Through the CEP and RPOs, the State Office of Energy Resources administers the program and approves all disbursements of grant money. The RPOs provide "A-to-Z" service for the client. The RPO will aid in the filing of applications. The client pays a $25 filing fee per facility. The RPO also conducts the initial site visit to get acquainted with how the facility is managed and its condition. RPOs are also available to make presentations to the Boards of Directors of client agencies.

After an organization has submitted a complete application, the RPO conducts a site visit to the facility. There are three major parts to this visit. First, the RPO energy auditor explains the program to the appropriate officials from the applicant organization. Then, usually with the person responsible for building operation and maintenance accompanying, the auditor tours the building and collects information regarding the envelope, equipment, etc., that affect the facility's energy use. The auditor then reviews the data collected, identifies the categorical measures that the applicant is eligible to receive assistance on, and submits an offer sheet to the applicant. The offer sheet describes what work the organization is immediately eligible for assistance on and estimates the cost of the work.

Categorical measures include attic and sidewall insulation, duct and pipe insulation, air infiltration work, storm windows, some lighting measures, and burner replacements. If the organization is interested in completing work that is not categorically eligible for assistance, a Commercial Conservation Service Equivalent (CCSE) audit or other technical audit is required. A CCSE audit costs the applicant an additional $100. The total cost of the audit is generally around $250 with the additional costs subsidized by the state. This audit is

generally used for fairly simple buildings where the applicant is interested in non-categorical measures such as heating or cooling system replacements, window replacements, some controls, and some lighting measures.

More complicated buildings, either complex because of size or equipment, can receive an Engineered Technical Audit (ETA). CEP, with state approval, issued a request for proposal for conducting such audits and has contracted with a handful of firms. If a client requires such an audit, it will be assigned one of these firms. The client has the right to veto the assigned firm for any reason one time. After that, the client must work with the assigned firm. The client pays for this audit, but NEEP will subsidize up to $1,000 of the audit above and beyond approved grants. Organizations, which have their own professional audit conducted by firms not selected by NEEP will be accepted by the program for grant purposes if they meet technical specifications. The RPO then reviews the audit report with the client and aids the client in developing an energy management plan. The RPO will identify measures that qualify for grants. The client then makes a decision on whether to proceed. If it agrees to go forward it gets bids from contractors to do the work. Only one bid is required, but organizations typically get more than one estimate. At that point, the RPO packages the proposal and sends to the state office through CEP. The state then receives the proposal and decides whether to approve the package. If approved, the state sends a grant agreement for the client's signature. After the work is completed, the RPO conducts a post-installation inspection. Upon receiving a favorable report, the state provides the grant.

For major projects, such as rehabilitations, the client can get grant funding for construction management duties. The state chose not to get involved with this part of the process because of liability and technical capacity concerns. The RPOs also helps clients enroll in rebate programs with utilities.

Financing. The NEEP program is funded through $5 million in Kansas Stripper Well PVE account funds. Another $300,000 was provided by two gas utilities from natural gas overcharge cases involved with the Louisiana First Use Tax Fund.

Eligibility. All 501(c)(3) organizations under the Internal Revenue Code are eligible for grants. Restrictions are placed on eligibility. Generally buildings used more than 20% of the time for religious purposes are not eligible. However, NEEP will provide funds for

conservation measures for specific areas that the client can demonstrate aren't used for religious purposes, e.g., church basements used for recreation or human services. Grants are prorated to take into account collateral improvements to the entire facility stemming from the funded measure.

Residential facilities that are not part of a staffed program of supportive social or medical services, or are not nonprofit employee housing are not eligible. However, they are eligible for other energy conservation interest subsidy programs offered by the state.

Facilities eligible for funding under the ICP are not generally eligible. To fill the void the ICP has left concerning smaller facilities in schools, NEEP will provide funds. So although the facility may be technically eligible for ICP funds, NEEP will fund projects for what they term "noncompetitive" ICP projects.

The state has decided that hospitals would not qualify at all because they are ICP-eligible and are typically complex.

Mobile facilities also are not eligible for NEEP grants.

Recruitment. The RPOs are relied upon for outreach efforts. But the resource and personnel intensive nature of the program puts restraints on marketing.

Type of Assistance.

- Grants

  In addition to the support services provided by the RPOs and the subsidies for energy audits, NEEP provides grants for qualifying conservation measures.

  NEEP will provide 100% of the first $5,000, 50% of the next $10,000, 35% of the next $10,000 and 25% of the next $30,000 spent on energy efficiency measures. A cap of $80,000 is imposed on an organization for all its facilities.

- Eligible Measures

  Categorical measures include air infiltration measures, attic, wall, tank, duct, pipe, and, in some cases, floor insultation, storm windows, oil burner and steam trap replacements, some steam radiator vents, programmable thermostats, low-flow showerheads and faucet aerators, and some lighting measures. If any categorical measure is not in place, or not in good operating condition, the installation of such measures will be funded.

Other measures are eligible only after a CCSE, ETA or other audit meeting NEEP standards is completed. Assistance on measures such as replacement heating systems, other NVAC measures, replacement windows, and some lighting measures, is provided up to either the cost of the measure or the first year savings multiplied by the estimated life of the measure, whichever is less.

In order for any part of the first $5,000 of assistance to be applied to a non-categorical measure, all categorical measures must either be completed or a non-categorical measure must be found, through a NEEP approved energy audit, to have a better payback than a categorical measure.

OUTCOMES

Approximately 100 projects are in the pipeline. Progress has been slow because of the complex and resource-intensive nature of the program.

FUTURE DIRECTIONS

The state is in the process of trying to simplify the system. The program is funded through October 1989 and may be extended.

CONTACT FOR FURTHER INFORMATION

- Executive Office of Energy Resources, Nonprofit Energy Efficiency Program, 100 Cambridge Street, 15th Floor, Boston, Massachusetts 02202; John Manning, Director, Residential Finance Division, (617) 727-4732.

7. MICHIGAN COMMUNITY FOUNDATION ENERGY INITIATIVE

PURPOSE OF PROGRAM

Community Foundation Energy Initiative (CFEI) was established to increase energy efficiency of nonprofit organizations and lower income households.

DESCRIPTION OF PROGRAM

CFEI, through the Council of Michigan Foundations and local community foundations, provide a variety of services to reduce energy costs of nonprofit agencies and low-income households. The 14 local community foundations that are participating make all decisions on types of conservation measures to be funded and the nature of the financing.

THE DEVELOPMENT PROCESS

Brief History. In 1986 the Council of Michigan Foundations on behalf of 14 community foundations approached the state legislature seeking funds for the program.

Key Players. The Council of Michigan Foundations, fiscal agent for the program, and participating community foundations matched the $3 million in state appropriated funds. The effort resulted in the first State Government/community foundation partnership in the country. It also represents the first time community foundations have cooperated in such a manner.

Major Obstacles. For CFEI, the community foundations had had little experience in dealing with federal regulations and had little experience with energy conservation programs generally. Assistance provided by the state and the establishment of local advisory committees mitigated these problems. Raising funds to complete the dollar-for-dollar match also presented an obstacle which, with community support, local foundations were able to overcome.

HOW THE PROGRAM OPERATES

Administration. The Council of Michigan Foundations is fiscal agent for the program. However, the local community foundations administer the program, deciding how the program will operate and who will get funding. The SEO reviews projects to assure

compliance with grant requirements. Programs vary among the 14 community foundations. However, efforts are made to aid the eligible groups in applying for benefits.

Financing. The state legislature appropriated $3 million from Exxon PVE funds. Another $3 million was raised by the community foundations from private donations to supplement the program.

Eligibility. Nonprofit agencies not served by other programs and lower income families are eligible for assistance. However, local community foundations administering the fund have discretion to fund other projects appropriate. This discretion comes in part from the efforts to match the state appropriation.

Recruitment. The local foundations took a variety of approaches in soliciting interest in the program.

Type of Assistance. A variety of assistance is being provided, ranging from workshops, energy audits, low-interest loans and grants. Again, the local foundations are responsible for their programs.

OUTCOMES

The program has met with success, although comprehensive data have yet to be developed.

CONTACTS FOR FURTHER INFORMATION

- Jane Morgan, Program Associate, Community Foundation Energy Initiative, 333 West Fort Street, Suite 2010, Detroit, Michigan 48226, (313) 961-6675.

- Barbara Chubb, Manager, Financing and Public Sector Programs, Office of Energy Programs, Michigan Public Service Commission, Post Office Box 30221, Lansing, Michigan 48909, (517) 334-6270.

8. MICHIGAN SENIOR CENTER ENERGY CONSERVATION PROGRAM

PURPOSE OF PROGRAM

Senior Center Energy Conservation Program (SCECP) was established to encourage energy conservation in the more than 450 senior centers in Michigan.

DESCRIPTION OF PROGRAM

The SCECP issues requests for proposals twice a year and determines funding on a competitive basis. The program is administered by the Office of Services to the Aging.

The program was funded at the same time as the CFEI. A program revision was approved in 1989 to provide additional technical assistance services.

THE DEVELOPMENT PROCESS

The program is administered by the Office of Services to the Aging. The state legislature, on its own initiative decided in 1987 to appropriate oil overcharge funds to aid senior centers' ECMs. These energy grants parallel another senior center facility grant program.

Major Obstables. For SCECP, the major obstacle was that the audits used to determine appropriate conservation measures did not reflect the needs of the senior centers. The senior centers place more emphasis on comfort measures, e.g., more heat in winter; cooler air in the summer. Also, matching the energy audit recommendations, bids, and grant application information proved difficult for some senior center administrators. The program revision addressed these problems.

HOW THE PROGRAM OPERATES

Administration. The Office of Services to the Aging administers this program. The state office issues two requests for proposals each year, and proposals are ranked.

Financing. The state legislature appropriated $2 million in Kansas Stripper Well PVE funds in 1987.

Eligibility. Senior citizen centers in Michigan are eligible for funding.

Recruitment. The office sent out announcements that the program was being created and then followed up with sending applications to all to senior centers.

Type of Assistance. The state pays for some audits. Some utilities provide free audits. Grants are capped at $50,000 per facility. The average award thus far has been $15,000. Half the grant is provided upfront; the remainder is provided after a post-installation inspection by the state.

OUTCOMES

The program has met with success, although comprehensive data have yet to be developed.

CONTACTS FOR FURTHER INFORMATION

- Judy Webb, Aging Resources Developer, Area Agency Administration, Office of Services to the Aging, Post Office Box 30026, Lansing, Michigan 48909, (517) 373-4066.

- Barbara Chubb, Manager, Financing and Public Sector Programs, Office of Energy Programs, Michigan Public Service Commission, Post Office Box 30221, Lansing, Michigan 48909, (517) 334-6270.

9. NEW HAMPSHIRE

PURPOSE OF PROGRAM

The New Hampshire Energy Conservation Grants for Nonprofits gives grants to agencies that provide essential human services to implement ECMs.

DESCRIPTION OF PROGRAM

The state created an informal application process through which eligible organizations could receive up to $10,000 in grants to implement conservation measures. Funds were provided through the Exxon and Diamond Shamrock PVE accounts.

THE DEVELOPMENT PROCESS

Brief History. The SEO and the Governor's staff met to determine what to do with $17 million from the PVE accounts. Several hearings were conducted in late 1986 generating a number of ideas, which ultimately led to 25 different energy conservation programs, including the nonprofit human service agency program, which received $500,000. In July 1987, the state government announced the availability of funds and imposed an August 14 deadline. Almost all applications that passed the SEO review were approved by the governor in mid-December 1987.

Key Players. Key players included members of the governor's staff and the SEO. The Charitable Fund of New Hampshire also played a role in helping to identify eligible nonprofit organizations and designing the program. United of Way of America also provided advice on designing the program. The financial condition of the local utilities at the time prevented them from playing a major role.

Major Obstacles. The state had some trouble identifying its target population for its program. However, once it succeeded in doing so, the greatest constraint was the availability of funding.

HOW THE PROGRAM OPERATES

Administration. Eligible organizations were required to submit a cover letter including the organization's name, contact person, audience, type of service provided and conservation measures contemplated.

Estimates for the cost of the conservation measures were required. While only one bid for the work was required, the state office noted that most organizations sought and provided more than one bid for the conservation measures.

A statement on the organization's energy consumption for the two previous heating seasons was also requested. An energy audit was not required but was encouraged.

A wide range of applications were received, varying significantly in thoroughness -- from handwritten one-page letters to full-blown energy audit reports.

Because requests ($1.6 million) outstripped available funding ($500,000), the state office ranked the applications. A three-step process was developed. First, essential human service organizations received priority over other types of organizations.

Second, the shorter the payback period for a measure the higher the priority. The state office assumed that the groups lacked the expertise to calculate payback periods and used existing data within the office to make such determinations. A "loose schedule," grouping measures into three categories was used to determine payback periods: 0-to-5 years; 5-to-10 years; and 10-to-15 years.

Third, the SEO conducted an in-house review to make the final decisions on allocations. The state office noted that by the third step, most projects had been winnowed and few projects were rejected at that point.

Grants were provided upfront, and the state is conducting spot inspections to ensure projects are implemented.

Financing. Funding came from the Exxon PVE account and the Diamond Shamrock PVE account. Total funding was approximately $500,000.

Eligibility. All registered 501(c)(3) organizations were eligible for grants. The state, however, tried to target organizations which provided direct human services, such as shelters and food banks. A variety of other programs were available to hospitals, libraries and schools

from the original $17 million in the oil overcharge funds and regularly appropriated federal funds.

Recruitment. The state worked through its own list of potential clients and sought aid from the New Hampshire Charitable Fund, a coordinating group for nonprofits. Other "obvious" groups asked to help in located nonprofits included United Ways and the state Council of Churches. Brochures explaining the program then were sent to nonprofit organizations.

Type of Assistance. Grants of up to $10,000 were provided for conservation measures. Organizations applying for projects costing more than $10,000 had to demonstrate the availability of funds to make up the difference prior to receiving grants. Fuel switching was not considered a conservation measure.

OUTCOME

The state approved 71 grants with an average award of $7,000. One grantee decided not to participate, reducing the total number of awards to 70. The state office said many YMCA-type organizations received grants as did groups providing aid to women and girls, e.g., shelters for battered women and centers for abused children.

The state office reported a good distribution of funds across the state. However, the Keene area received a disproportionate share of funds because of the activism of an engineer who aided in writing grant proposals.

Approximately 100 churches applied but none ranked high enough to qualify for funding. The SEO attributed this, in part, to the lack of experience religious organizations have in applying for grants compared to many nonprofit organizations. The state office noted the failure of religious organizations to gain funding may have had a negative effect to the extent they play a major role as meetinghouses for nonprofit organizations.

FUTURE DIRECTIONS

The state contemplates another program using approximately $450,000 in Kansas Stripper Well PVE money starting in December 1989. The process is expected to become more formal than the first round.

Audits were required, and a more formal application was developed to ease the state's administrative burden. The state has become more active in helping organizations conduct audits by providing a list of independent auditors. If the financial condition of the local utilities improves, the state expects to see some further aid from them.

Applicants will be required to provide three bids from contractors to better estimate the cost of the conservation measure.

Grant money disbursements will be changed so that only half of the money will be provided upfront with the remainder paid after completion of the conservation measure.

CONTACT FOR FURTHER INFORMATION

- Scott Maltzie, or Brenda Sweet, Governor's Energy Office, 2 1/2 Beacon Street, Concord, New Hampshire 03301, (603) 271-2711.

10. NEW YORK ENERGY CONSERVATION PROGRAM

PURPOSE OF PROGRAM

The Not-For-Profit Energy Conservation Program (ECP) provides a variety of energy conservation services to nonprofit organizations to improve energy efficiency and conservation.

DESCRIPTION OF PROGRAMS

Participating Community Foundations conduct conservation workshops, training seminars and energy audits and provide assistance for technical assistance updates to eligible organizations in buildings with more than 15,000 square feet. Expected technical amendments in the state's enabling legislation will allow the foundations to provide interest subsidies on loans and principal buydown funding for approved ECMs. The program has been given $15 million in funding over four years.

Of the 18 community foundations approached, 15 are participating in the program. Fourteen of these programs (including the New York Community Trust) use the New York Community Trust as their central financial agent, handling many of the financial management chores which otherwise would be duplicated in each program.

The New York SEO supervised the ECP and disbursed available funds and provided regular reports to the state legislature and the governor.

The SEO administered the ECP through a network of community foundations. The foundations determined projects to be funded with SEO approval.

THE DEVELOPMENT PROCESS

Brief History. The ECP grew out of the desire of community foundations to use PVE account funds for ECMs not currently being funded for nonprofits not served by other state programs, such as the ICP.

In the 1985-1986 session of the state legislature, the foundations pushed legislation for the program using PVE funds drawn directly from the Exxon overcharge fund. Key players

in the ultimate passage of the law in June 1986 were United Way of New York and the New York Community Trust.

Key Players. The foundations implement the program and submit proposals. SEO reviews the requests. At the state's suggestion, the foundations established advisory committees to help with planning. Members of the advisory committees included umbrella service organizations, such as the United Way of New York, and electric utilities.

Major Obstacles. The ECP drew funds exclusively from the Exxon PVE account. Consequently, it operated under federal restrictions imposed by the Warner Amendment (named after Sen. John Warner (R.-Va.), the author of the amendment). The SEO and the foundations were given $600,000 and $300,000, respectively, to operate the program.

- The Exxon money, under federal statute, can only go to one of five programs: Institution Conservation Program, State Energy Conservation Program, Weatherization Program, Low Income Energy Assistance Program and the Energy Extension Service.

  Until changes in the federal regulations in December 1988, states were prohibited from providing funds for capital loan programs. The New York State Legislature is in the midst of revising its enabling legislation to reflect this change, and the program expects to start funding interest subsidies (rebates) and principal buydowns for capital improvements aimed at energy conservation for eligible nonprofits.

- Duplicative services are also prohibited. Consequently, the SEO published a directory of services, not only to educate the affected public, but also to survey the universe of services already provided. This aided in avoiding duplication and allowed funds to be spent on areas currently not served but eligible for benefits. One result was that the state's Small Business Energy Efficiency Program, which conducts free energy audits on buildings with less than 15,000 square feet, was provided Exxon PVE money to help in implementing the ECP Furthermore, the state was able to identify areas not served through the ICP, which allowed for "filling the gaps" not served by that program.

- Start-up had its problems. The community foundations found that they were responsible for administering the program, a position with which they were unaccustomed. Also the establishment of a network of these foundations was new and took some time. However, experience to date suggests that the foundations' officials have become better administrators as a result of the hands-on work, and a viable network for cooperation among the foundations has been established which can be called upon in the future for other programs.

- The state and the foundations are prohibited from using the Exxon money for administrative expenses, consequently state and foundation funds or other sources of funding were required.

  Because of the crush of requests for audits (in part because of SEO referrals) to qualify for the capital improvement funds in the fall of 1988, the Small Business Energy Efficiency Program was swamped. SEO put together a "SWAT" team by training college students to conduct energy audits and sending them to areas unable to keep up with demand.

HOW THE PROGRAM OPERATES

Administration. The program was administered through 15 foundations. Of the 15 foundations, 14 agreed to use the New York Community Trust as the central fiscal agent. The SEO formally reviews all proposals, but the lead administrating entities are the community foundations. The foundations require formal applications from nonprofit organizations verifying their eligibility and outlining their needs.

Under the ECP, the foundations initially were given 5% of the allocation to create a plan over six months. They then submitted their first full-year plans, complete with milestones to be reached, e.g., number audits and technical assistance studies conducted, to the SEO. As part of the planning process, the foundations conducted needs assessments. For example, in Buffalo, the servicing foundation identified a large population of churches, which would take advantage of the program. The Buffalo Foundation worked with the Buffalo Area Mission of Ministries and provided the consortium of churches with a $120,000 grant to operate a program providing audits and other energy conservation programs for its members.

Such plans are required annually. Flexibility in planning is provided by allowing the foundations to unilaterally shift money among identified programs within the ECP. Shifts of funds involving more than 10% of the annual allocation require a waiver from the SEO.

To avoid foundation cashflow problems, the SEO provides 20% of allocations upfront to the foundations. Funding for services is provided on a continuous basis. PVE funds and is appropriated by the state legislature.

Financing. ECP funding comes from the Exxon PVE account and is appropriated by the state legislature.

Eligibility. To be eligible for ECP funds, an organization must be a state-registered nonprofit or a federal tax-exempt organization.

Recruitment. The foundations initially had service areas that covered approximately 37 of the state's 62 counties. To get complete statewide coverage, the state allocated the Exxon money on a county-basis determined by 1980 Census data. A per county allocation encouraged the foundations to extend their service areas.

Because the foundations were instrumental in passing enabling legislation the program was relatively well-known. Other ways of encouraging participation included mass mailings, newspaper advertisements and stories, utility customer newsletters, and publicity through umbrella groups, such as the United Way. This outreach effort was part of the initial six-month planning period at the start of the program.

Type of Assistance. The program focuses on buildings with more than 15,000 square feet. Currently, assistance is restricted to conducting workshops, training seminars, technical assistance and energy audits not provided by the Small Business Energy Efficiency Program or ICP.

Other services include management consultations, audit follow-ups, and aid in establishing cooperative purchasing agreements (i.e., to consolidate purchases to get bulk order prices).

With revisions expected in early fall, the program will be expanded to allow for interest subsidies and loan rebates not to exceed 50% of the total costs of improvements. There is no specific cap on individual projects.

Data. A central database is being developed by the Central New York Community Foundation. All participating foundations contribute to the support of this on-line database.

OUTCOMES

Results currently available understate progress as the foundations needed some time to organize. However, estimates through the winter of 1989 show that 31 boiler cleanings and tuneups and nine technical assistance study updates were funded. More than 60 workshops with attendance between 1,100 and 1,200 have been held.

FUTURE DIRECTIONS

The future of the program is in doubt and currently under consideration in the state legislature. The program was slated to end April 30, 1989.

CONTACT FOR FURTHER INFORMATION

- Burton J. Rounds (518) 473-2035, State Energy Office, Manager, Not-For-Profit Program and Special Projects, 2 Rockefeller Plaza, 8th Floor, Albany, NY 12223.

11. NEW YORK GRANT PROGRAM

PURPOSE OF PROGRAM

The Not-For-Profit Energy Conservation Grant Program (Grant Program) for Health and Human Service Organizations provided funding for capital improvements and equipment servicing to improve energy efficiency and conservation.

DESCRIPTION OF PROGRAM

The program, which was announced in June 1988, provided funding for capital improvements specifically designed to increase energy efficiency for buildings occupied by eligible organizations. The program was given $3 million for one year. The timing of the program enabled it to take advantage of marketing efforts used by a related program, the Not-for-Profit Energy Conservation Program (ECP).

The New York SEO supervised the program and disbursed available funds and provided regular reports to the state legislature and the governor.

The Grant Program was directly administered by the SEO.

THE DEVELOPMENT PROCESS

Brief History. The Grant Program was adopted through the urging of the United Way, Red Cross and the Salvation Army, as well as other umbrella organizations, using the Kansas Stripper Well PVE account funds.

Key Players. The program was directly administered by the SEO. The program also relied on the participation of the 15 community foundations involved with the Not-for-Profit Energy Conservation Program (See New York ECP report).

Major Obstacles. Because of the crush of requests for audits (caused in part by SEO referrals) to qualify for capital improvement funds in the fall of 1988, the Small Business Energy Efficiency Program was swamped. SEO put together a "SWAT" team by training college students to conduct energy audits and sending them to areas unable to keep up with demand.

HOW THE PROGRAM OPERATES

Administration. The program was administered by the SEO. SEO reviewed the applications and ranked them based on payback (accounting for half of the weighting), energy savings, cost effectiveness and climatic conditions.

Formal applications for the Grant Program had to be submitted to the SEO by October 1988. The network of foundations used in the Energy Conservation Program (see New York ECP report) provided local representatives to aid groups in applying for benefits. Organizations needed a recently approved audit as part of their applications. (This requirement caused the huge demand for audits creating need for "SWAT" teams to help provide audits.)

Financing. The Grant Program was funded through Kansas Stripper Well PVE funds and is appropriated by the state legislature.

Eligibility. To be eligible for the Grant Program, an organization must have been a tax exempt organization specifically under the IRS Code Sec. 501(c)(3). Further, the organization must have spent at least 50% of its annual budget on direct aid, assistance or benefits to individuals or families to meet human needs, including shelter, food, medical care, counselling, support, training and other social services.

Recruitment. The network of foundations established through the ECP (see New York ECP report) made dissemination of the Grant Program much easier and in many cases piggybacked on ECP marketing efforts. Further, local foundation officials were trained to help organizations in filing for grant applications.

The state held a series of hearings on the issues as regulations were developed for the program. These hearings were credited by state officials with increasing the visibility of the program and, therefore, participation.

Type of Assistance. The Grant Program paid 80% of eligible project costs or $12,000, whichever was less. However, multiple nonprofits sharing a building qualified for up to $60,000 in funding. Eligible groups used in-kind services to make up their 20% shares.

Eligible projects required a payback period of not less than one year but not more than 10 years. However, a package of improvements were allowed to be considered as one measure for determining payback periods.

Projects not on the state's list of acceptable improvements were funded only if properly supported by an audit and other technical documentation.

Data. SEO currently is conducting a review of the program.

OUTCOMES

Applications for $5.4 million were submitted to SEO. SEO reviewed and ranked the projects and allocated all $2.4 million in available funds to 260 organizations representing 414 buildings. Interest in the program is thought to have been related to the activism of the local foundations. The more active foundations generated more applications and tended to get more funding as a result.

FUTURE DIRECTIONS

The future of the three-year program depends upon legislative action.

CONTACT FOR FURTHER INFORMATION

- Burton J. Rounds (518) 473-2035; State Energy Office, Manager, Not For Profit Program and Special Projects, 2 Rockefeller Plaza, 8th Floor, Albany, NY 12223.

12. WASHINGTON

PURPOSE OF PROGRAM

The Energy Savings for Nonprofits Program is to assist nonprofit agencies in becoming more energy efficient; these agencies had never been eligible for conservation assistance prior to this program. The program consists of technical assistance, grants, education, and loans.

DESCRIPTION OF PROGRAM

The program provides direct grants and interest free loans to pay for conservation measures that have been validated by a utility audit or one of two state-approved contractors. The program ran from July 1987 through June 1989. Specific counties were targeted because the program was a demonstration with limited funding under SECP rules. The state had not previously administered a conservation program for nonprofits.

THE DEVELOPMENT PROCESS

Brief History. In consultation with three major utility companies (Snohomish Public Utility District, Seattle City Light, and Tacoma Public Utility), the Washington State Energy Extension Service (EES), UWA, several health and human service nonprofit organizations plus the Washington SEO, proposed to Power Washington a demonstration program to use $850,000 of PVE account funds to create an energy efficiency program for nonprofit organizations. Power Washington was the body established by the Governor to make recommendations and decisions regarding disposition of PVE funds in Washington. Five counties (Snohomish; Spokane; King, which includes Seattle; Pierce, which contains Tacoma; and Thurston, which contains Olympia) were targeted.

The program was initially conceived as employing the "circuit rider" concept, modeled after a Kentucky program where the program manager travels to the target organizations and assists them to establish local efficiency programs for nonprofits, including a full range of services such as audits and installation of ECMs.

During the planning process, however, the three utility companies in the target area offered to add eligibility for audits for nonprofits to the array of services they already made available to others as part of their community service. The audits they offered would be at no charge to the state or the agencies.

It was also recommended that the $850,000 in PVE money be blended with funds available through the Bonneville Power Administration's Commercial Incentive Pilot Program (CIPP). CIPP was already in place providing services and funds for commercial establishments; to add nonprofits was seen as an easy and logical step. The state viewed combining the PVE funds with CIPP funds for nonprofits as a method to achieve an ecomomy of scale and efficiency in getting services to the nonprofits. The blending of funds allowed nonprofits to install conservation measures at no cost to themselves. Ultimately, the utilities contributed approximately $400,000 to the program.

During the summer of 1988, the governor ordered an expansion of the program to include two new counties (Benton and Franklin, near the Hanford Nuclear Reservation) bringing the program up to seven counties.

Key Players. Washington SEO and EES, with planning help from UWA and United Ways in the state, nonprofit groups in the state, plus local utilities developed the design for the demonstration project. The program is controlled by SEO with input from all of the players.

Major Obstacles. The biggest problem that confronted the demonstration project was the difficulty nonprofits experienced in obtaining the legally-required three bids for implementing the conservation measures. The difficulty is due to several factors. Many of the jobs were very small ($500-$600), and contractors were reluctant to bid on them. Nonprofits lacked expertise in how to solicit bids, and in rural areas there were few contractors who would do the work. The state consequently relaxed the requirement for multiple bids, on a case-by-case basis, and permitted nonprofits to solicit telephone rather than written bids for projects expected to cost under $1,500.

HOW THE PROGRAM OPERATES

Administration. The Washington SEO administers the program.The SEO obtained mailing lists from a variety of governmental and private/voluntary health and human service agencies and sent information to the agencies explaining the program. They included a fact sheet and a one-page preliminary application with a return envelope addressed to the specific provider of services.

In areas not served by the utilities the state used independent contractors or SEO/EES staff to aid in providing nonprofits with the technical services required. Independent contractors serviced Spokane and the the outlying portions of King, Pierce and Thurston counties.

An energy audit was required to qualify for grants or loans. The audits took from two months to six months to complete, depending on the complexity of the project. As part of the final audit report, nonprofits were required to obtain bids on costs to install the measures indicated. The utilities often aided nonprofits in obtaining bids. Upon completion of the final audit report, the SEO initiated contracting procedures directly with the nonprofit.

Financing. Financing is as follows: $750,000 from the Exxon PVE account, $100,000 from the Kansas Stripper Well PVE account and $400,000 from the three public utilities, Seattle City Light, Snohomish PUD, Tacoma Public Utilities, and one private utility, Puget Sound Power and Light.

Eligibility. To qualify for the program, an organization had to be a human service provider in one of the seven demonstration counties. Further, the organization had to be registered as a nonprofit under Sec. 501(c)(3) of the Internal Revenue Code.

Recruitment. Direct mail was used to reach potential agencies. Mailing lists were obtained from a variety of sources in and out of State Government.

Type of Assistance. The program offered grants, loans, audits, and education. Two types of grants were available: $2,000 for buildings with under 5,000 square feet, and $4,500 for buildings with more than 5,000 square feet.

Interest free loans up to $30,000 were offered. A one-time 5% finance fee was imposed. Loans must be repaid on a quarterly basis and within five years.

Paybacks. Two methods of rating conservation measures based on paybacks were used. First, if the conservation measure was recommended as part of a utility audit, measures had to have a projected payback of no more than 15 years.

If the conservation measure stemmed from the recommendations of the state appointed contractor, the required payback period was 10 years or sooner. However, if the client received funds from outside foundations or utilities to supplement state funds, they could qualify for a 15-year payback period.

Payback periods in Washington are longer than in other locations because of the state's reliance on relatively inexpensive hydropower.

OUTCOMES

Data are still preliminary, but the program has served 134 nonprofit organizations resulting in annual savings of at least $175,000. Energy consumption has been reduced by 3.2 million kilowatt hours and 11 billion BTUs of gas. Over $1,000,000 was paid out for measure installation.

FUTURE DIRECTIONS

$330,000 from Kansas Stripper Well PVE account will be used to extend the program to cover the entire state. The state is refining its workplan and plans to approach businesses and foundations for supplemental funds.

CONTACT FOR FURTHER INFORMATION

- Patricia Gibbon (Energy Specialist), Washington State Energy Office, (206) 586-5046.

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