



**SEE Action**

STATE AND LOCAL ENERGY EFFICIENCY ACTION NETWORK

# State and Local Energy Efficiency Action Network and Financing Solutions

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US Department of Energy

# About SEE Action

**Goal:** All cost-effective energy efficiency by 2020

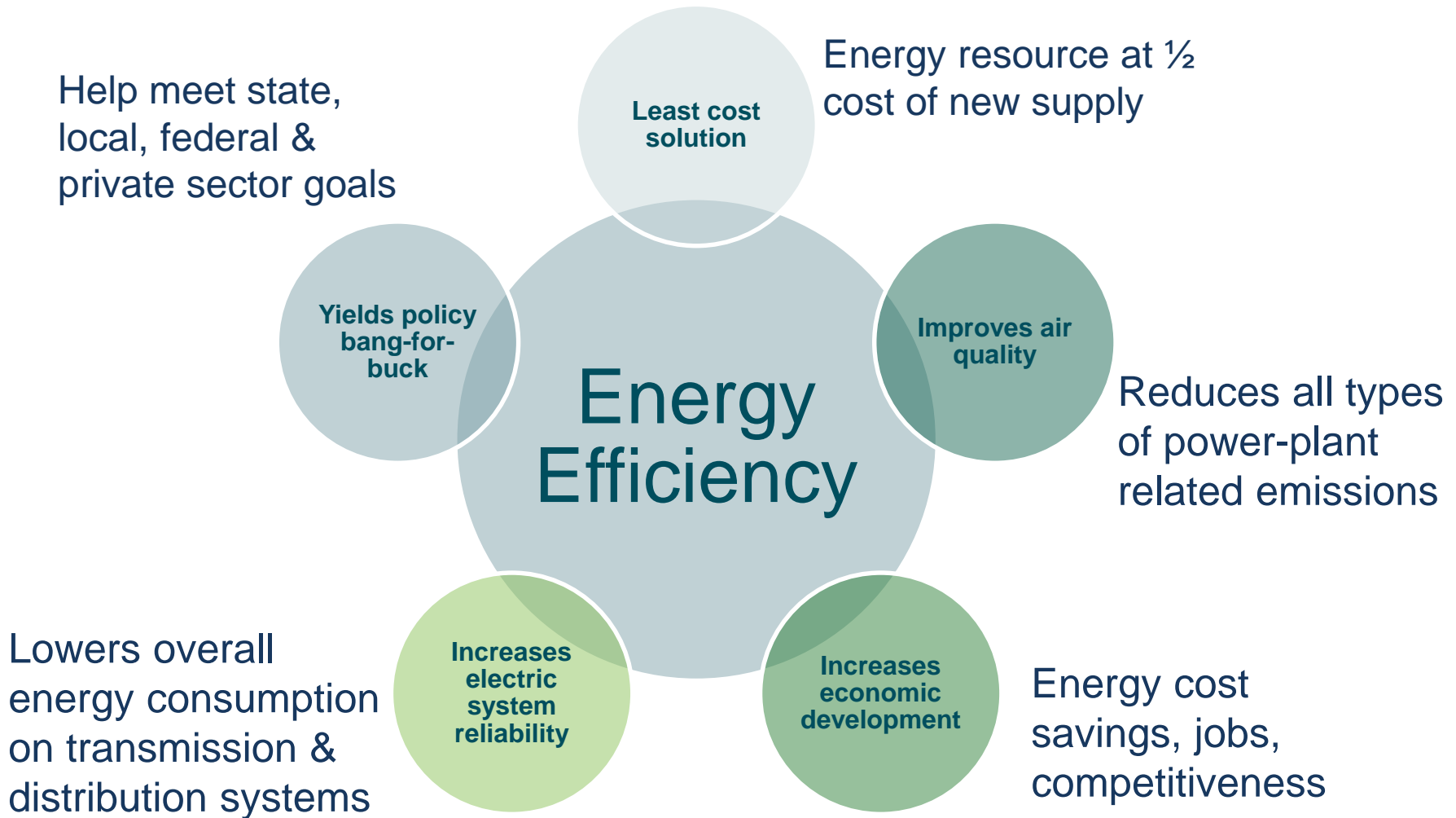
- Network of 200+ leaders and professionals, led by state and local policymakers, bringing EE to scale at state & local levels
- Facilitated by DOE and EPA; successor to the National Action Plan for Energy Efficiency



*The SEE Action Network is active in the largest areas of challenge and opportunity to advance energy efficiency*



# Why Energy Efficiency



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# What SEE Action Does

Based on experience, a library of:

- Best practices
- Considerations for decision making
- Analysis of current approaches

Support on energy efficiency policy and program decision making for:

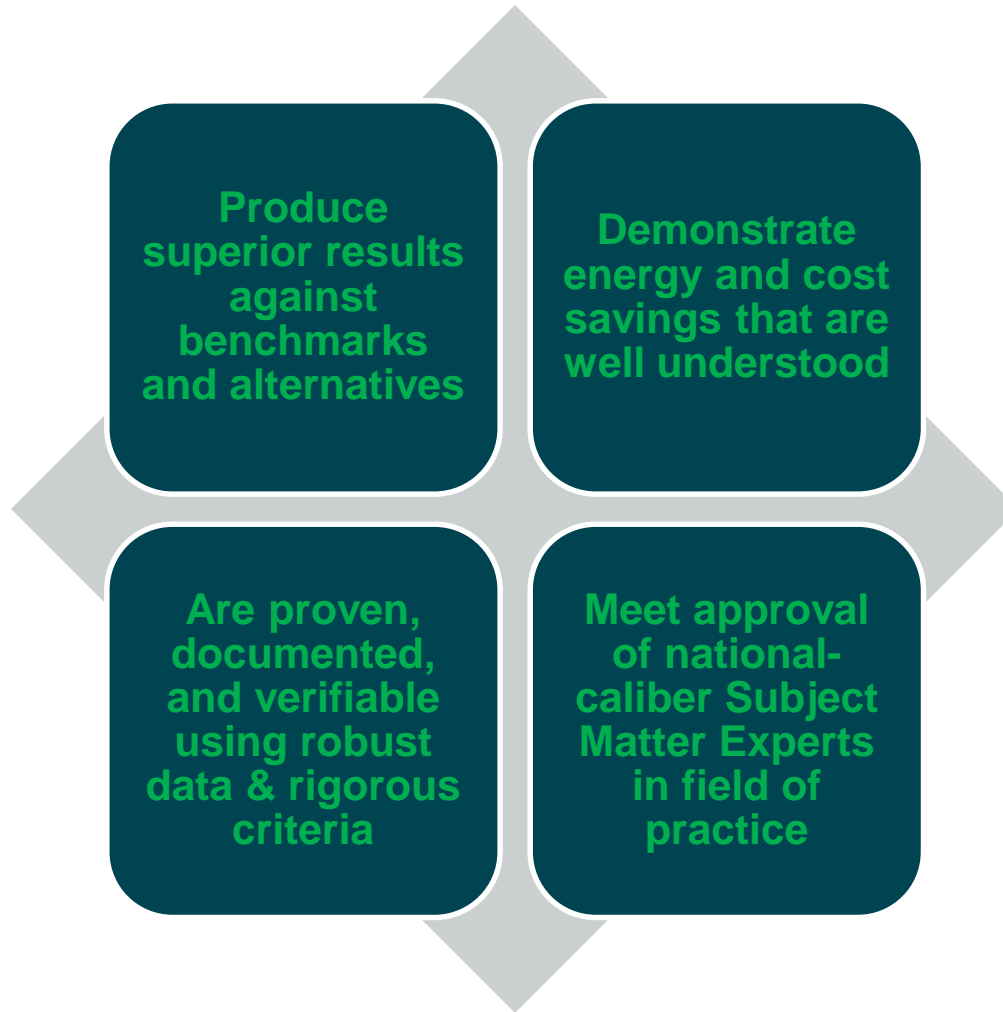
- Energy office directors, utility regulators, air directors
- Legislators, governors, mayors, county officials
- Consumer advocates, other stakeholders



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# SEE Action Guidance Documents



# A Unique and Effective Effort

*The great thing about SEE Action is that they are **leveraging the expertise of a diverse group of stakeholders to develop valuable resources** that can help any stakeholder gain a better understanding of these issues and barriers, as well as potential solutions.*

*Often there are no quick fixes or absolute best practices, but the SEE Action materials and events can help you gain a better understanding of key considerations very quickly. **If you are actively engaged in energy efficiency policy, you should definitely have SEE Action on your radar.***

Anne-Marie Peracchio  
Director, Conservation and Affordability  
New Jersey Natural Gas



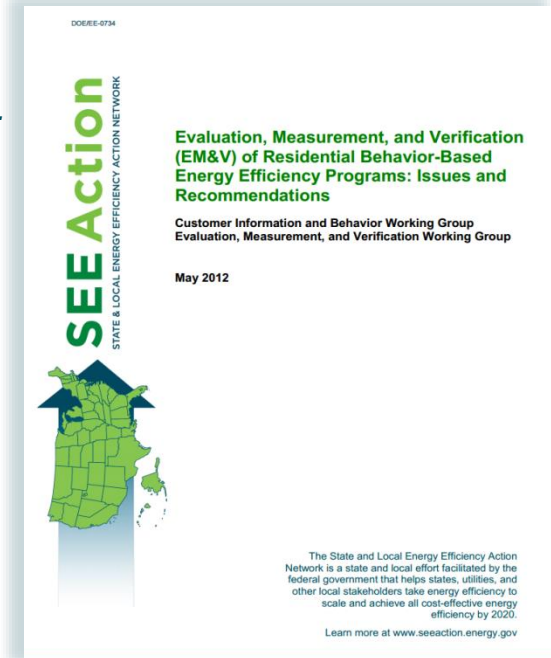
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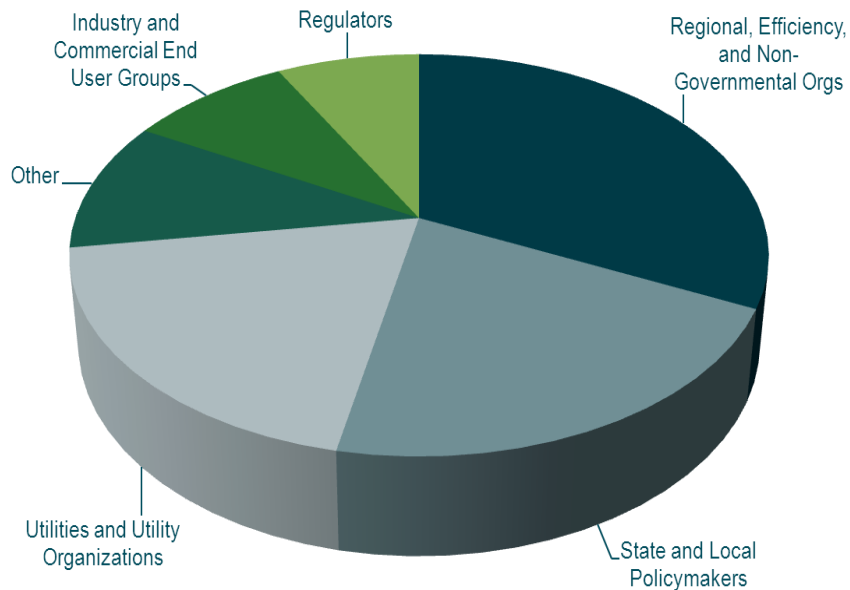
# Making an Impact

- **Arkansas - TRM Behavior-Based Program Evaluation Protocol**  
*"This protocol was developed based upon the recommended best practices described [by] the State and Local Energy Efficiency (SEE) Action Network. . ." (Sept. 2012)*
- **California - Docket filing by Opower**  
*"The wisdom of this [CPUC] decision was subsequently underscored by the State and Local Energy Efficiency (SEE) Action Network report . . . which found that ex post measurement and experimental design are consistent with best practices for measurement of residential behavioral programs." (July 2012)*
- **Illinois - Comments filed by C3**  
*"Savings are evaluated using experimental and quasi-experimental design to compare the change in energy use of a 'treatment group' (participants) to the change in energy use of a control group," citing the report as relevant authority for aspects program design. (Sept. 2012)*
- **Massachusetts - EE Advisory Council Behavioral Program Evaluation Report**  
*"[T]he evaluation team has developed a number of standard practices and recommended next-steps for third-party evaluation of the behavioral programs. Some of these are covered in recent best practices. . ." (July 2012)*
- **Washington - PacifiCorp DSM Docket**  
PacifiCorp agreed *"to adopt similar approaches identified in LBNL report"* after state Public Counsel recommended specific actions based on report (July 2012)



# Network Membership and Structure

Over 200 professionals  
representing over 130  
organizations



## Executive Group

- Provides visionary leadership, strategic direction, and drive to meet goals

## Working Group Co-Chairs

- Oversee development and dissemination of information resources for state/local leaders

## Working Group Members

- Provide technical expertise to ensure quality; help shape Working Group goals & activities



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# SEE Action Leadership: Executive Group

**Al Skodowski** Transwestern  
**Clay Nesler** Johnson Controls  
**Greg White** NARUC  
**David Jacot**, Los Angeles Dept of Water & Power  
**David Terry** NASEO  
**Debra DeHaney-Howard** USCM  
**Dian Grueneich** Stanford Precourt Center  
**Don Gilligan** NAESCO  
**Ed Wisniewski** Consortium for Energy Efficiency  
**Gene Rodrigues** ICF International  
**Glen Andersen** NCSL  
**Greg Bergtold** Dow Chemical Company  
**Jennifer Easler** IA Office of Consumer Advocate  
**Kateri Callahan** Alliance to Save Energy  
**Derek Murrow** Natural Resources Defense Council

**Larry Downes** NJ Resources  
**Lisa Jacobson** Bus. Council for Sustainable Energy  
**Adam Cooper** IEE – Innovation, Electricity, Efficiency  
**Malcolm Woolf** Advanced Energy Economy  
**Mary Ann Ralls** NRECA  
**Nancy Seidman**, MA Dept of Environmental Protection  
**Ashley Duckman** American Gas Association  
**Rick Tempchin** Edison Electric Institute  
**Sandra Byrd** Arkansas Electric Cooperative Corp.  
**Steve Bicker** Tacoma Power  
**Steve Nadel** ACEEE  
**Sue Gander** NGA Center for Best Practices  
**Alex Hofmann** American Public Power Association  
**Garrett Fitzgerald**, Urban Sustain. Directors Network  
**David Springe**, NASUCA  
**Susan Stratton**, Northwest Energy Efficiency Partnerships



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# SEE Action Leadership: Working Groups

Working Group	Co-Chairs
Existing Commercial Buildings	<b>Eric Coffman</b> , Dept. of Environmental Protection, Montgomery County MD <b>Carolyn Sarno</b> , Northeast Energy Efficiency Partnerships
Industrial Energy Efficiency and CHP	<b>Todd Currier</b> , Washington State University Extension Energy Program <b>Chad Smith</b> , Ohio Air Quality Development Authority
Evaluation, Measurement & Verification	<b>Lauren Gage</b> , Bonneville Power Administration <b>Tom Eckman</b> , Northwest Power and Conservation Council
Financing Solutions	<b>Bryan Garcia</b> , Connecticut Green Bank <b>Bruce Schlein</b> , Citi
Customer Information and Behavior	vacant <b>Jessica Burdette</b> , Minnesota Dept of Commerce, Div of Energy Resources
Residential Retrofit	<b>Brian Castelli</b> , Home Performance Coalition <b>Frank Murray</b> , formerly NYSERDA





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Policy & Program  
Resources

Publications

## ENERGY EFFICIENCY FINANCING

Financing is one of several linked strategies to drive and enable customer demand for energy efficiency. Financing alone does not lead to energy savings, but it may be an effective tool for helping customers overcome the high up-front costs of a range of energy efficiency investments.



## Guidance Documents from the Network



**Making it Count:  
Understanding the Value of  
Energy Efficiency Financing  
Programs Funded by Utility  
Customers**

This report lays the  
groundwork for a dialogue to

explore regulatory and policy mechanisms for ensuring that efficiency financing initiatives provide value for society and protection for consumers. Featuring case studies of Connecticut, New York, Massachusetts, California, and Maryland, *Making it Count* explores emerging questions that jurisdictions will need to answer when considering an increased reliance on financing, including:

# On-Bill Financing

## *Financing Energy Improvements on Utility Bills: Market Updates and Key Program Design Considerations for Policymakers and Administrators*

Provides an overview of the current state of on-bill programs and provides actionable insights on key program design considerations for on-bill lending programs. States and utilities are increasingly turning to on-bill financing to stretch their limited efficiency program dollars and to overcome a number of barriers to the uptake of energy improvements in residential and non-residential properties.

<https://www4.eere.energy.gov/seeaction/publication/financing-energy-improvements-utility-bills-market-updates-and-key-program-design>



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# PUC Treatment of Financing Programs

## ***Making It Count: Understanding The Value Of Energy Efficiency Financing Programs Funded By Utility Customers***

Featuring case studies from CT, NY, MA, CA, and MD, explores emerging questions that jurisdictions will need to answer when considering an increased reliance on financing, and describes the regulatory frameworks in use by states for ratepayer-funded energy efficiency financing efforts to integrate, oversee, and ensure the efficacy of these efforts.

<https://www4.eere.energy.gov/seeaction/publication/making-it-count-understanding-value-energy-efficiency-financing-programs-funded-utility>



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# Accessing Secondary Markets

## ***Accessing Secondary Markets as a Capital Source for Energy Efficiency Finance Programs: Program Design Considerations for Policymakers and Administrators***

Access to capital from secondary markets—reselling energy loans to investors to replenish program funds—is being advanced as an important enabler of the energy efficiency industry “at scale.” However, it is largely untested. This report reviews energy efficiency-related secondary market transactions to date and considerations for program administrators accessing secondary markets.

<https://www4.eere.energy.gov/seeaction/publication/accessing-secondary-markets>



# Lending Program Data Practices

## *Energy Efficiency Finance Programs: Use Case Analysis to Define Data Needs and Guidelines*

This report takes a foundational step toward the establishment of common data collection practices for energy efficiency lending. It reviews existing practices for data collection for energy efficiency financing programs, identifies high-priority needs, characterizes potential uses for finance program data, and identifies use cases for data on financing program and loan product performance.

<https://www4.eere.energy.gov/seeaction/publication/energy-efficiency-finance-programs-use-case-analysis-define-data-needs-and-guidelines>



# Coming Soon: Financing for LMI Households

## *Energy Efficiency Financing for Low- and Moderate-Income Households: Current State of the Market, Issues, and Opportunities*

Review of financing products available to low and moderate income customers in the single family and multi-family residential sectors. Analysis of market barriers, product and program design features designed to address barriers, uptake to date, and opportunities for expansion. Will include discussion of managing consumer protections and data needed to support further understanding of the state of the market.



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# Recent U.S. DOE Resources

- **Guidelines for Residential PACE Financing Programs**
  - best practices for program implementation
  - reflect input from over 200 comments
  - special emphasis on consumer and lender protections
  - program design recommendations that address the unique needs and potential vulnerabilities of low-income and elderly households

<http://energy.gov/eere/slsc/downloads/updated-guidelines-residential-pace-financing-programs>

- **Current Practices in Efficiency Financing: An Overview for State and Local Governments**

<https://emp.lbl.gov/publications/current-practices-in-efficiency-finan>





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## Energy Efficiency Policy and Program Resources

Explore what's working to advance energy efficiency across the country—based on state and local government experience.

[Behavior-Based Energy Efficiency >](#)

[Combined Heat and Power >](#)

[Commercial and Public Building Energy Efficiency >](#)

[Energy Efficiency Financing >](#)

[Energy Use Data Access >](#)

[Evaluation, Measurement, and Verification >](#)

[Industrial Energy Efficiency >](#)

[Ratepayer-Funded Efficiency through Regulatory Policy >](#)

[Residential Energy Efficiency >](#)

The State and Local Energy Efficiency Action Network (SEE Action) offers [resources](#), discussion forums, and [technical assistance](#) to state and local decision makers as they provide low-cost, reliable energy to their communities through energy efficiency.



## 2020 Leadership Agenda for Existing Commercial and Multifamily Buildings



## Who's In The Network?

Meet our network of state and local leaders and subject matter experts advancing energy efficiency.



[Meet Our Network](#)

## Upcoming Events

There are currently no events. See all [past SEE Action events](#).



Sign up for news alerts and updates.

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SEE Action is a state- and local-led effort facilitated by the U.S. Department of Energy and the U.S. Environmental Protection Agency to take energy efficiency to scale and achieve all cost-effective energy efficiency by 2020.

[Contact Us](#)

# Thank You

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Visit [www.seeaction.energy.gov](http://www.seeaction.energy.gov)

## Contact

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