

Retail Merchants Association of NH

# Energy Efficiency Program

Quarter 2 Report

1 Nov 2009 - 31 Jan 2010

# **GREENHOUSE GAS EMISSIONS REDUCTION FUND**

## **Quarterly Progress Report Form**

### **Retail Merchants Association of New Hampshire – Energy Efficiency Program**

The first phase of this Program will include a number of elements or “types of programs” including the following (as numbered in PUC 2604.01 (c)):

1. Energy audits; 2. Weatherization of New Hampshire commercial building; 4. Revolving loan funds for efficiency related investment; 8. Programs to improve the electric and thermal energy efficiency of existing commercial buildings; 10. Education, outreach and information programs that promote energy efficiency, conservation and demand response; 11. Demand response; 12. Other: civic leadership, creation of larger public education campaign which will target retail transactions as learning opportunities. Potential elements which may be included: 5. Energy efficiency related work force training and development; 6. Integration of passive solar heating and ventilation; 7. Programs to increase compliance with the building energy code.

### **Work completed November 1, 2009 – January 31, 2010:**

- Please refer to Exhibit A for a review of work completed by task and sub-task.
- Program activities have not had any benefit to low income residents.
- We fully subscribed 25 participants for the Phase 1 audits by December 31, 2009. As we continue to process report data for these participants, obtaining the energy data still appears to be a place when time can be lost. The Jordan Institute has worked to streamline this process on behalf of program members, and has been able to facilitate faster delivery of energy use data. The Energy Efficiency Program is on track for enrollment into Phase 2, and any delays at this point would likely be a result of simply having too many people wanting to participate in the program, all at the same time.

### **Work to be completed February 1, 2010 – April 30, 2009:**

- In the third quarter, activity is fast-paced, as the Jordan Institute completes moving our program participants through the Phase 1 assessments, and moves them into Phase 2 audits. It is likely we will complete 10 Phase 2 audits in this quarter. At that point, we will be planning demonstration projects (Phase 3), and rolling out a media campaign to highlight our program activities in the business community.
- Legal and contract documents that will be necessary to enroll retailers in Phase 3. We have completed a rough draft of how we believe the rebates will work, based on dollar value of the project after other financial resources have been exhausted. We will also be developing criteria to qualify program members to receive the rebate dollars.
- Program outreach efforts to maintain excitement about the program, and measure retailer response to our efforts will continue through a dedicated electronic newsletter campaign,

and Facebook articles. We will create an “Energy Tool Kit”, which could be left at member and non-member locations, and distributed to members showing interest in energy efficiency, but who were too late in enrolling in the program. We would like them to explore the other energy-saving opportunities that are out there, and use RMANH as an information portal.

- Program presentations will be made with “green teams” and local chamber groups to inform the business community of the success of the program, and educate them on other resources that might be available to their members.
- The third quarter will necessitate the hiring of a case manager, responsible for financial package construction, utility rebate program coordination, and demonstration project support.

**Budget vs. Actual Expenditures** – Please reference the attached budget spreadsheet.

**Job creation** - The Project Manager position was created as a result of this grant. In the 3<sup>rd</sup> quarter, a Case Manager will be hired to assist with Phase 3 projects. We have a later than anticipated hire date for this position because of the delayed timing in finishing Phase 1 reports.

**Obstacles** – Phase 1 reports were very work intensive, and collecting the data from program members took longer than anticipated. In spite of this, the reports being completed by the Jordan Institute are comprehensive, and compel members to move into Phase 2. As Phase 2 projects get underway, the report generation should be tighter, as we have already collected the baseline data and established positive working relationships with RMANH members. Program members who have received their Phase 1 results have all indicated the desire to move into Phase 2. This leaves us potentially having created interest for 25 members, where we had proposed to offer 10 Phase 2 audits, with financial assistance.

## Exhibit A

### Scope of Services

#### Task 1: Establish Administrative Structure

Subtask 1.1: Hire a program manager to direct the RMANH Program's administrative structure and to carry out overall Program administration responsibilities, including management of the financial elements of the Program. The program manager will be employed by the RMANH and will work closely with The Jordan Institute (TJI).

*✓Q1: 100% Completed 08/05/2009 as a collaborative effort between RMANH President/CEO Nancy Kyle, Jim Monahan from The Dupont Group, and Dick Henry from The Jordan Institute: Project Manager Julie Skarritt offered position at \$43,000 salary w/ 15% benefits. Start date is August 24, 2009.*

Subtask 1.2: Employ The Dupont Group and The Jordan Institute to design survey and data collection instruments.

*✓Q1: 100% Completed 05/29/2009: Awarding of grant with stipulations employing the above named subcontractors.*

Subtask 1.3: Identify potential Program participants by surveying RMANH members. Members must affirmatively enroll in the program in order to participate in energy efficiency activities, thus narrowing the group of business that will receive more focused attention. A more detailed questionnaire will be used to populate the Program's database.

*Q1: 85% Completed 09/04/2009: Application for Energy Program created by PM Julie Skarritt, in collaboration with The Dupont Group and The Jordan Institute, to gather information on potential participants interested in enrolling in Energy Efficiency Program. Those people interested in the Energy program who are not already RMANH members have to also fill out the already existing RMANH membership application. 16 completed applications have been received, and are at various stages in the phase 1 portion of the program.*

*✓Q2: 100% Completed 12/31/2009: All 25 Phase 1 spaces were filled. Of the 25, 18 were existing RMANH members, and 7 have become RMANH members to take advantage of the Energy program.*

#### Task 2: Launch Education and Communications Campaign

Subtask 2.1: Launch an ongoing public education and communications campaign that will accomplish the following:

Subtask 2.1.1: Expand the RMANH website to include a new energy efficiency page that will supply information about the Program and allow members to enroll.

*Q1: 50% Completed 10/13/2009. As case studies are developed, the web page will be updated to reflect new information, project news, and changes/additions to the Energy Efficiency Program.*

*Q2: 70% Completed 1/22/2010. FAQs sheet added to website. Due to technical problems with the RMANH website, we cannot turn the electronic newsletter into an RSS feed, which was our original plan*

*to keep the information current and available to subscribers. The electronic newsletter will instead be converted to a pdf, and downloaded from the energy page of the RMANH website.*

**Subtask 2.1.2:** Create printed materials, including a brochure for the program, FAQ's, and a detailed enrollment letter.

**Q1: 25%** - Detailed enrollment letter completed by PM Julie Skarritt on 09/01/2009, FAQ's completed by PM Julie Skarritt, in collaboration with The Dupont Group and The Jordan Institute on 09/25/2009, project folders printed by an outside source completed on 10/06/09. Postcard mailer and program brochure completed 11/18/09. These will be deployed at non-member locations, to generate interest in the program from retailers outside RMANH membership. The postcard mailer will be used as a follow-up to the e-newsletter campaign, to inform recipients that the program is being subscribed to, and that participation is limited.

**Q2: 35%** - The postcard mailer was distributed at the BIA Energy form, and mailed to 75 businesses in Nashua and 79 businesses in Rochester. The contacts were generated from a purchased database or retailers who are not current members of RMANH. Future printed materials created will focus on the production of an "Energy Tool Kit" in Q3. This tool kit will combine information from utility rebate programs, energy efficiency loan programs, public energy efficiency resources, and borrowing privileges for "kill-a-watt" meter devices, so retailers can see/experience energy use in their facilities.

**Subtask 2.1.3:** Organize two regional energy efficiency seminars for retail businesses to learn about the RMANH program. Three smaller, local sessions will be held in order to reach out to other parts of the state where members reside.

**Q1: 40%** - Two Energy & Eggs Seminars were held, (1) 9/29/09 Rochester, NH (2) 10/19/09 Nashua, NH. To generate interest in the program to potential members, Julie Skarritt has attended two events sponsored by The Green Alliance, as a guest speaker. Scheduled for completion Spring 2010.

**Q2: 40%** - Due to the public/member interest shown to date, soliciting businesses to be a part of the program has slowed, so as not to over-subscribe. We are considering creating a waiting list for the program, and at the very least, distribute the "Energy Tool Kit" to these members. In Q3, we plan to generate stories about our members' success, and share that with local green groups, Chambers of Commerce and related business trade organizations. We also anticipate making a presentation to the House Science and Technology Committee.

**Subtask 2.1.4:** Schedule a second round of seminars after the initial seminars, as well as two annual seminars and trade shows with targeted retail business leaders.

**Q1: 10%** - Based on the attendance of the first two Energy & Eggs Seminars, we will schedule additional speaking engagements after newsletter distribution, trade show attendance and additional community outreach activities have been completed, in early 2010. This includes presentation of the program at the RMANH Annual Meeting and Legislative Reception. Scheduled for completion Spring 2010.

**Q2: 40%** - The first e-newsletter was sent out to 1) the RMANH member database and 2) a non-member database consisting of 146 recipients (47% view ratio), and Jim Monahan from The Dupont Group presented the Energy Efficiency Program in Manchester, NH at a BIA trade show on 12/2/09. These events and the RMANH Annual Mtg held in February preclude the scheduling of more seminars.

Subtask 2.1.5: Seek a news media advertiser.

*Q1: 40% - News media advertiser is scheduled to be selected once members enter the project implementation phase of the program, where they will assist in telling our "stories" of energy efficient projects throughout the community. White Birch has made initial editorial contacts and began the creation of a news media database, as well as a news media ad. Scheduled for completion during Phase 2/Spring 2010.*

*Q2: 40% - In a letter to the PUC in February the RMANH proposed to slow down some of the enrollment marketing efforts, as other efforts were fully subscribing the program. This potential modification would slow down, or eliminate the need for this element of the plan.*

Subtask 2.1.6: Distribute a newsletter and develop a Constant Contact program to support an on-going communications plan.

*Q1: 20% - Newsletter "Retail Recap" distributed to all RMANH members, late October. A similar electronic newsletter will be distributed late November, using IntelliSense program to manage contacts, and continuing approx every 2 wks thru July 2010. Scheduled for completion by Summer 2010.*

*Q2: 40% - Energy Efficiency Program e-newsletter was sent out to 1) the RMANH member email database, approx 400 recipients and 2) a non-member database consisting of 146 recipients (47% view ratio) on 12/2/2009. The next scheduled release date is 2/22/2010.*

### Task 3: Deploy Member Inventory and Enrollment

Subtask 3.1: Sign up appropriate members for utility CORE and demand response programs.

*Q1: 20% - Initial research conducted by the Dupont Group to investigate what is being done in other states with regard to demand response programs. This will be reviewed again in early 2010, as demonstration projects begin to emerge in the program.*

*Q2: 30% - Initial research suggests that a changing and perhaps smaller NE- ISO Demand response program might make it difficult to develop a RMANH program. However, RMANH will be meeting in March with third party commodity suppliers to develop commodity programs which may include Demand Response.*

Subtask 3.2: Coordinate with other GHGER funded programs, as well as the workforce development elements of the Governor's Green Jobs Initiative, which will offer an opportunity for training to take place at RMANH member facilities.

*Q1: 25% - The Dupont Group representing Project Manager Julie Skarritt, met with other RGGI Grantees, October 9, 2009, to discuss where our programs can work to support one another, as there may be some overlap into the communities served by our respective programs. Next step to post our information on CleanAir CoolPlanet's RGGI site and there was an interest in meeting quarterly to be coordinated by Roger Stephenson from CACP. This is an on-going effort, to monitor, interact, and track work being conducted in the energy efficiency community, and includes outreach by PM Julie Skarritt, the Dupont Group, and the Jordan Institute.*

*ESE Board meeting attendance by PM Julie Skarritt, the Dupont Group, and the Jordan Institute. Climate Change Collaborative meeting attendance by the Dupont Group. Green Alliance meeting attendance by PM Julie Skarritt.*

*Q2: 30% - Efforts continue to monitor, interact, and track work being done in the energy efficiency community. This includes outreach by all program partners (PM Julie Skarritt, the Dupont Group, and the Jordan Institute). EESE Board meeting in attendance by PM Julie Skarritt, the Dupont Group, and the Jordan Institute. Climate Change Collaborative meeting attendance by the Dupont Group. PM Julie Skarritt testifying on behalf of RMANH on the group net metering bill (HB 1353). The Dupont Group attending HB 1353 work sessions.*

Subtask 3.3: Connect participating businesses' retail customers with energy efficiency programs.

*Q1, Q2: 0% - Scheduled for completion during Phase 3/Summer 2010.*

#### **Task 4: Conduct Energy Efficiency Evaluations and Audits**

Subtask 4.1: TJI will perform preliminary energy audits and case studies for roughly 25 businesses, which will include onsite visits and analysis of energy use (including fuel oil) and cost.

*Q1: 28% - As of 10/31/09, 8 out of 25 preliminary audits have been completed. 16 applications have been rec'd for audits, leaving 9 slots left available out of the 25. See Supplemental A from The Jordan Institute.*

*Q2: 44% - As of 1/31/2010, 11 out of 25 preliminary audits for Phase 1 have been completed by The Jordan Institute.*

Subtask 4.2: Select a smaller group of ten to twelve candidates for a full Assessment and Evaluation for their commercial building. TJI and other sub-contractors will perform the following:

Subtask 4.3: Blower door and infrared envelope analysis, lighting census, evaluation of natural lighting options, and HVAC system evaluation and suggested upgrades.

*Q1: 0% - This has not been completed during the first quarter b/c none of the businesses who had the preliminary energy audits completed have progressed to this point yet. Scheduled for completion during Phase 2/Spring 2010.*

*Q2: 0% - Data for this category will begin in the 3<sup>rd</sup> quarter (Feb 2010).*

Subtask 4.4: Evaluate potential heating, cooling, air exchange, envelope, lighting, and all electric usage options.

*Q1: 0% - This has not been completed during the first quarter b/c none of the businesses who had the preliminary energy audits completed have progressed to this point yet. Scheduled for completion during Phase 2/Spring 2010.*

*Q2: 0% - Data for this category will begin in the 3<sup>rd</sup> quarter (Feb 2010).*

Subtask 4.5: Review efficiency, demand reduction, and peak shaving potential of more efficient alternative fuel systems for each building, including biomass, solar (thermal and PV), combined heat and power, and possible district heating collaborations where appropriate.

*Q1: 0% - Scheduled for completion during Phase 2/Spring 2010.*

*Q2: 0% - Data for this category will begin in the 3<sup>rd</sup> quarter (Feb 2010).*

Subtask 4.5.1: Provide both an energy model and a financial model of all the various viable alternatives and work with the owner to determine an implementation plan.

Q1: 0% - *Scheduled for completion during Phase 2/Spring 2010.*

Q2: 0% - *Data for this category will begin in the 3<sup>rd</sup> quarter (Feb 2010).*

Subtask 4.5.2: Assign each resultant "implementation project" to a case manager who will work with the business to structure the project management which will include seeking bids, ordering materials, enrolling in utility programs, engineering and contracting.

Q1: 0% - *Scheduled for completion during Phase 2/Spring 2010.*

Q2: 0% - *Data for this category will begin in the 3<sup>rd</sup> quarter (Feb 2010).*

## Task 5: Develop Project Financing and Implementation

Subtask 5.1: Work out a cost-sharing financing package for each project, utilizing all available incentives, and ensuring that GHGER funds are used in the most cost-effective manner. This will be a collaborative effort between TJI, Ocean Bank and other banks, and an accounting and law firm to be determined.

Q1: 0% - *Scheduled for completion during Spring & Summer 2010.*

Q2: 30% - *We have retained the legal services of Cleveland, Waters and Bass and have produced a Phase 2 Member Agreement, which outlines the payment responsibilities for a member to participate in the Phase 2 audit. We will begin the Phase 3 contract language in Q3, which will more stringently focus on the use of the rebate funds.*

## Task 6: Establish Civic Leadership Program

Subtask 6.1: Engage in civic leadership by partnering with Clear Air-Cool Planet, TJI, White Birch Communications Group and The Dupont Group to complete the following:

Subtask 6.1.1: Develop in-store displays of completed energy projects, including case studies.

Q1: 0% - *Scheduled for completion during Summer/Fall 2010 (or later).*

Q2: 10% - *White Birch created a media presentation board used for RMANH's Legislative Reception. The display board featured members in Phase 1 of the project, and contained a sample report produced by the Jordan Institute. This board can also be used at other community events, board meetings, and will be re-worked to reflect the success stories of Phase 2 and Phase 3 members.*

Subtask 6.1.2: Develop energy efficiency "champions" among RMANH members and associates who will advocate with their peers and the community at large about the benefits of the Program and the need for more public investment and support for energy efficiency and other greenhouse gas reduction efforts.

Q1: 15% - *Identified RMANH members likely to participate in the program. Outreach to individual members, conducted by PM Julie Skarritt, includes site visits, email correspondence, phone correspondence. Assistance given to members enrolling in the program and interfacing with The Jordan Institute to schedule site visits.*

*Q2: 30% - Having enrolled Phase 1 completely, and having delivered 11 of the Phase 1 reports, we have 6 verbal commitments from members who would like to proceed to Phase 2. This will result in a fully subscribed Phase 2 in short order. From these early adopters, we believe 3-5 will go to project implementation in Q3.*

**Subtask 6.1.3:** Research and develop a program which will seek to use the millions of retail transactions that RMANH members undertake each year to create a consumer carbon reduction campaign at selected businesses' POS location.

*Q1: 15% - Research conducted by The Dupont Group to investigate efforts being conducted in other states.*

*Q2: 25% - research concerning how similar programs are working in other states, and some smaller scale, local efforts in NH are underway. However, the more determinate factors will emerge as the enrollees move into more detailed projects and the program work with them to develop individualized promotion activities. These local efforts will offer guidance about what efforts retailers might want to undertake.*

## **Task 7: Establish Measurement and Verification of Energy Use**

**Subtask 7.1:** Establish pre-project energy use and energy expenditures based on at least three years of data.

*Q1: 0% - This data is being collected by The Jordan Institute, as they complete the Phase One Energy Assessments. Currently, data has been collected for 8 of the 25 assessments and TJI is processing this data. Scheduled for completion during Spring 2010.*

*Q2: 44% - Data for this category has been evaluated as a part of the Phase 1 audits performed by the Jordan Institute. Currently, 11 of the 25 audits have been delivered to the program members.*

**Subtask 7.2:** Collect post-project energy use data in partnership with TJI and Carbon Solutions New England and measure this against predicted energy use.

*Q1: 5% - RMANH, the Dupont Group and The Jordan Institute met to establish the guidelines for data collection. CSNE has been tasked with tracking this data.*

*Q2: 5% - The Jordan Institute will be collecting post-project data. Projects are anticipated to begin in Q3 and Q4, and into the years beyond the end of the grant term.*

**Subtask 7.3:** Track cost renovations and embed sensors in the buildings that received extensive renovations so that energy use can be accessed remotely at a finer detail than available just from utility bills. Actual energy use data will be collected for several years after renovations are completed to determine which measures are most effective. This information will be shared with clients to make necessary improvements and adjustments to operating procedures.

*0% - To be completed during the months & years beyond the end of this grant term.*

**Subtask 7.4:** Assess the impact of the education program on other building owners, employees, and walk-in customers.

*0% - To be completed during the months & years beyond the end of this grant term.*

**Subtask 7.5:** Extrapolate the energy use and expenses data in partnership with Carbon Solutions New England (CSNE) in order to:

**Subtask 7.5.1:** Develop greenhouse gas reduction potentials for the entire commercial sector in New Hampshire.

*0% - To be completed during the months & years beyond the end of this grant term.*

**Subtask 7.5.2:** Analyze the cost of implementation and the annual cost savings resulting from reduced energy use to quantify both environmental and economic benefits of the project.

*0% - To be completed during the months & years beyond the end of this grant term.*

**Subtask 7.5.3:** Modify the assumptions that were made to calculate greenhouse gas emission and economic benefits of activities recommended to the NH Climate Action Plan.

*0% - To be completed during the months & years beyond the end of this grant term.*