

Sonoma County Energy Independence Program and Energy Upgrade California

February 2, 2012

Resources, Models and
Lessons Learned

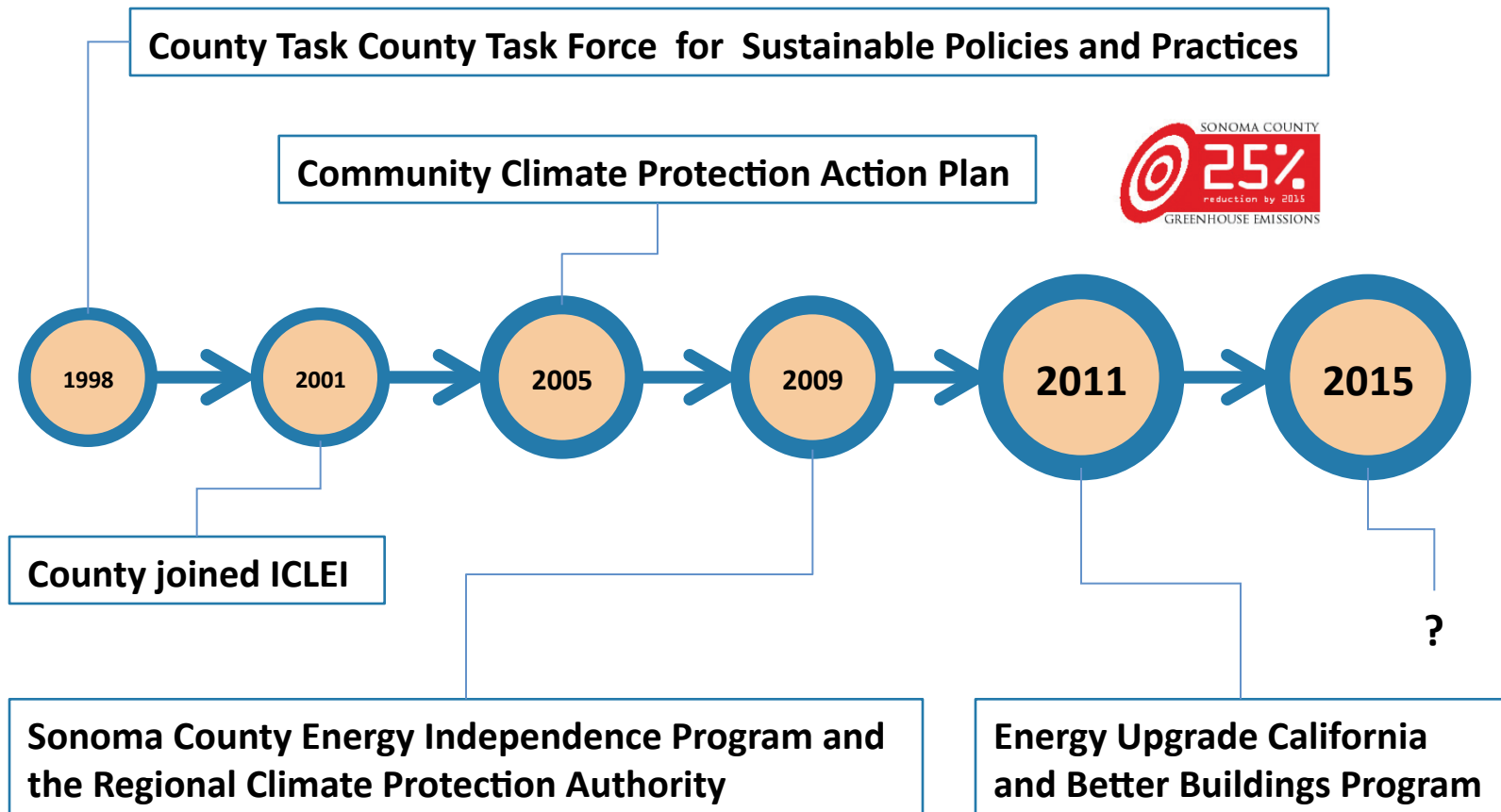


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Sonoma County's History

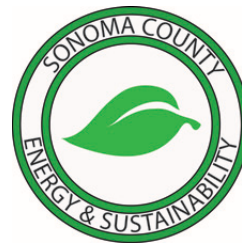




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Having the Foundation

- Common Community Goals
- Political will and support
- Existing partnerships to leverage competencies, minimize duplication and decrease consumer confusion
- Utility Support
- Legislation



Energy Policy



Collaboration and Partnerships

- Cities
- Agencies
- Non-profits
- Air Districts
- Other Counties
- County Departments and Divisions
- Sonoma County Water Agency (SCWA)
- Regional Climate Protection Authority (RCPA)
- Pacific Gas and Electric Company (PG&E)
- Sonoma County Transportation Authority (SCTA)
- Local building and trade organizations
- Educational institutions
- State and Federal Agencies
- The list truly runs off the page...

Non-Profit Organizations:

Faith-based Organizations, Climate Protection Campaign
Occidental Arts and Ecology, Community Action Partnership
Leadership Institute for Ecology and the Economy
Solar Living Institute, Volunteer Center
Solar Sonoma, SMART Train

Business and Workforce:

Trade Unions, North Bay Labor Council,
North Coast Builders Exchange
Business Environmental Alliance
Sonoma County Alliance
North Bay Leadership Council
PG&E

State and Federal Agencies:

Department of Energy
Housing and Urban Development
Health and Human Services
Department of Labor

Local Agencies:

Workforce Investment Board
Economic Development Board
Innovation Council
Energy & Sustainability

Education:

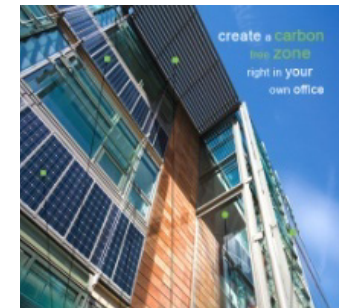
Sonoma State University
Santa Rosa Junior College
Sonoma County Office of Education
Emerging "Green Jobs" Charter Schools
Build It Green



Focus on Buildings

Aligning goals and benefits
with our competencies

- Saving energy and money
- Increasing health and comfort
- Decreasing emissions
- Developing the local economy and workforce

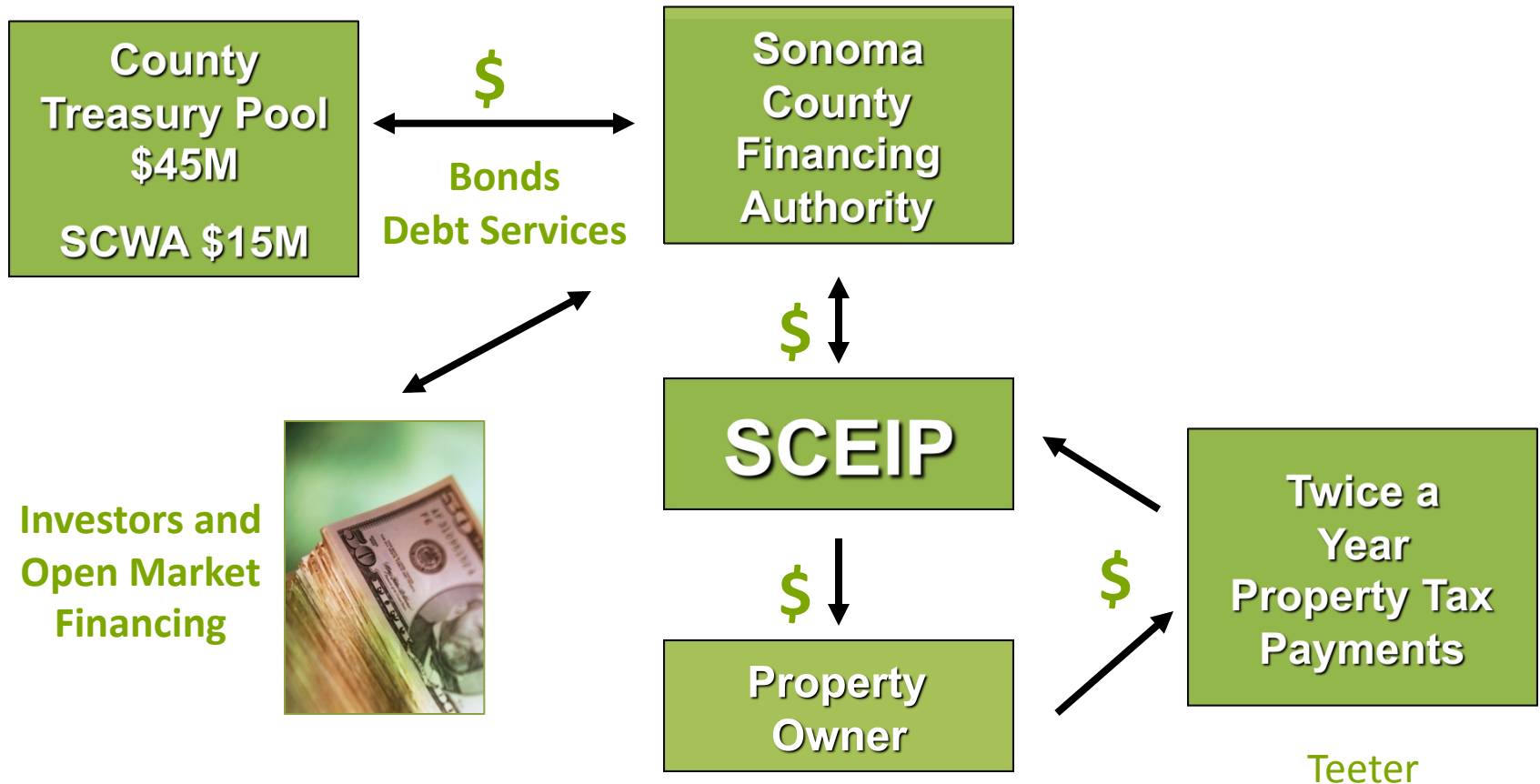


Pre-Launch Practical Considerations

- What does one-stop-shop look like in your community?
- Who is in charge and who is on the team?
- What to fund, what requirements?
- Maximum/Minimum assessments?
- How to process applications
 - In-house?
 - Outside administrator?
- How to raise capital?
- Who is answering day-to-day legal questions?



Long Term Sustainable Financing Warehouse



SCEIP and Energy Upgrade California

One-Stop-Shop program designed to deliver the tools and resources that make it easy for property owners to reduce energy use, increase comfort, save money and help the environment using a “whole building” approach

- Whole Building Approach
- Energy Analysis
- On-line and office support
- Rebates, incentives and financing
- Qualified contractors and quality assurance



One Stop Shop Approach

*Save
Money*

*Save
Energy*

*Go
Green*

*Live
Comfortably*



Contact or visit us for information and assistance online or in the office



Learn about your building as a system with an energy analysis and water audit



Consult with contractor(s) and your financial advisor to determine your best project plan

Secure your financing, maximize incentives and rebates and prepare applications



Complete your projects and reap your rewards: lower costs, better building environment and healthier buildings

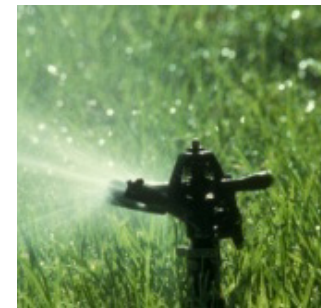




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Sonoma County Energy Independence Program

- SCEIP opened March 2009
- County wide, comprehensive program
- PACE assessments billed once a year on property taxes
- Wide range of both residential and commercial improvements eligible (> 85), energy efficiency, water conservation and renewable generation measures



Reduce and Produce

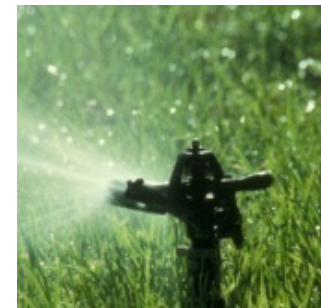
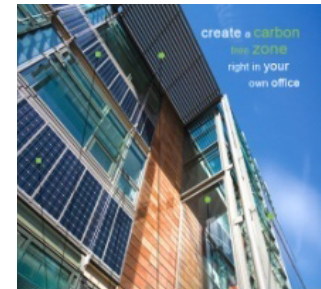
Who is Eligible for PACE?

- Improvements permanently affixed to the property
- Within geographical boundaries of the county
- Applicants are legal owner(s) of property
- Request less than 10% value of the property
- Commercial:
 1. Lender Acknowledgement
 2. Utility Company Energy Evaluation
 3. Organizational Documents



‘Underwriting’

- No credit check required, No income qualifications
- Does not count against debt/income ratio
- No risk pricing; everyone pays the same fixed 7% simple interest rate, Interest may be tax-deductable (verify with your CPA)
- Less than 100% lien to value ratio
- No bankruptcy or involuntary liens on the property
- Current on ALL liens against the property
- Current on ALL property taxes



Reduce and Produce

PACE Highlights

Program Activity through January 31, 2012		
Residential	1628 properties \$45.6 million	\$28k average
Commercial	52 properties \$10 million	\$192k average

Job-years retained/created
679 ARRA formula
71 Local Construction

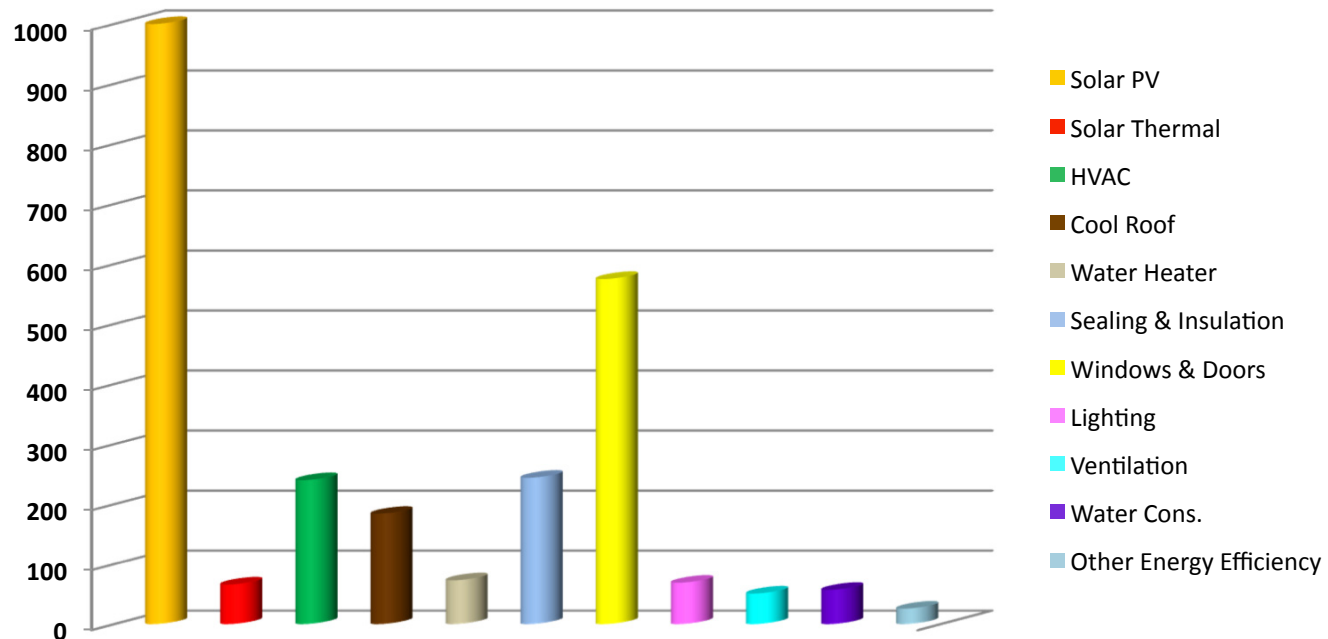


Project Types Financed

Generation

Residential: 5.7 MW, 983 systems, 3442 tons eCO₂ annual reduction

Non-residential: 1.9 MW, 38 systems, 1203 tons eCO₂ annual reduction




Key Program Elements

- Tool Lending Library
- Contractor Trainings
- Education and outreach
- Web site tool development

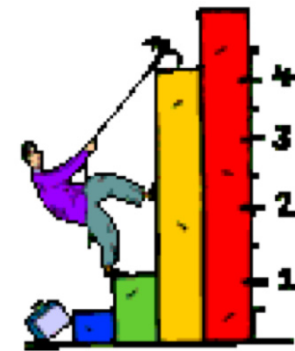


To Build a Flourishing Program

- Community Goals
- Public, Private, Education and Non-profit collaboration
- Work with Stakeholders: Lenders, Contractors, Local Utilities
- Plan for a Storefront and/or Web Site
- Tools and Applications (Replication resources) 
- Administrators, Staffing, Steering Committee, Legal Team, Financing Team
- Marketing, Education & Outreach!

Challenges / Opportunities

- Getting the message out
- Return on investment stories
- Need more robust energy evaluation protocol for commercial properties
- Acceptance by banks and lenders
- Interest rate competition
- Long term financing options
- On-bill financing for renters



The Future of Energy Independence

Possibilities:

- Increased commercial outreach
- Mandatory/incentivized energy analyses of homes
- Partnership with utilities on joint efforts towards energy efficiency and distributed generation
- Sharing the Replication “Kit” developed by the PACE Pilots ★





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Thank you

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Welcome to Sonoma County's Energy Independence Program
 Your one-stop-shop for efficiency and solar improvements for both home and business

Search Contractors
 Find qualified local service providers to do the work

My Action Plan | Find Rebates | Search Contractors | Apply for Financing

Program Activity Dashboard

Home Energy Workshops
 You can improve the comfort and health of your home, while saving money and lowering utility bills. Energy Upgrade can help. Learn How! Watch a FREE Home Energy Marketing

What's New
 We are pleased to announce two new rebate services, The Action Plan and Apply for Financing Tools!

In the News
 Media coverage for Sonoma County Energy Independence and Energy Upgrade continues in Sonoma County.

Featured Video
 Locally-produced 30-second TV spot highlights benefits of a home energy analysis and rebates of lead through Energy Upgrade featuring local actors and Jane Clay from SCEIP!

TOTAL BIDDING - 12/20/12	
Applications Received	2
Funding Requests Paid	\$20,270
Applications Approved	0
Contracts Signed	0
Energy Analysis Details Applications Received	2
GLOBAL PROGRAM ACTIVITY - BIDDING	
Applications Received	204
Funding Requests Paid	\$27,220,000
Applications Approved	129
Energy Analysis Details Provided	110
Contracts Signed	190
Contracts Funded	\$24,482,207
GLOBAL INVESTMENT ACTIVITY - BIDDING	
Energy Efficiency	1478
Water Conservation	80
Generation	1011
Residential Improvements Funded by PACE (Includes Energy Analysis rebates)	2007
Commercial Improvements Funded by PACE	79
TOTAL BIDDING - 12/20/12	
Improvements	210 of 280 (85%)
Dollar Volume	\$2,907,200

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