

## **ESC Program in a Box Lessons Learned Report (Updated 2018)**

The ESC's "Program in a Box" resource section is rich in materials to help State Energy Offices improve and/or develop their GESPC program. This report tracks lessons learned from the application of the "Program in a Box" materials and other resources available on the ESC website. This information was collected in an effort to better understand how these materials are being used, where they are being used, and the impact of their usage.

In a majority of cases, the usage of the ESC Program in a Box resources pre-date many of the people that manage these programs today. In these instances, the people that have inherited a statewide program are unaware of what materials and resources their states used when developing or expanding their program.

Below is a sampling of the impact of the Program in a Box materials and resources that have resulted from their use in recent years.

### **Delaware**

The Delaware Sustainable Energy Utility is the unit responsible for administering the Guaranteed Energy Savings Performance Contracting (GESPC) program in Delaware. While developing and refining their program the DESEU referenced Energy Services Coalition tools and resources at various points. Standardized documents on the ESC website were used to help craft the documents they now use. To date (2018), this program has implemented \$138,707,463 worth of GESPC projects.

Delaware also saw benefits in having an active ESC Chapter for assistance in providing outreach and education to GESPC end-users. ESC resources were used to launch the state's chapter ([www.energyservicescoalition.org/chapters/resources](http://www.energyservicescoalition.org/chapters/resources)). ESC Program in a Box, Workshop in a Box and ESC Chapter Playbook have guided the structure and activities of the Chapter which formed in 2012.

On October 18, 2017, the Delaware ESC Chapter held its 4th Annual Energy Conference. Attendance at this statewide conference exceeds 100 attendees annually and the event itself not only provides education for the marketplace but serves as a fundraiser that sustains additional Chapter education and outreach activities through the rest of the year. The ESC workshop guidance documents ([www.energyservicescoalition.org/chapters/resources](http://www.energyservicescoalition.org/chapters/resources)), as well as registration services through the ESC website, are utilized by the Chapter and contribute to the conferences success, and the GESPC model in Delaware.

### **Indiana**

In the summer of 2017, the Indiana Office of Energy Development, in coordination with several private sector energy services companies, launched an ESC Chapter to better spread their message about GESPC opportunities in Indiana, and provide outreach and education to targeted audiences on performance contracting and the process to use it. The Indiana Chapter held an informational meeting on September 21, 2017. During the inaugural meeting, the ESC State

Liaison shared information about other chapters, their activities, organization and next steps. Included among the items presented was the Program in a Box's *Starting an ESC Chapter PowerPoint* (<http://www.energyservicescoalition.org/chapters/resources>).

At a subsequent organizational meeting on October 30, 2017, the new Indiana ESC Chapter used documents (from the Program in a Box), including *Chapter Startup Guidance*, *Suggested Agenda for Organizational Meeting* and *Suggested Responsibilities for Committees*.

Since their organizational meeting the Indiana ESC Chapter has accessed additional ESC tools and resources, including, *Chapter Playbook*, *Job Calculator*, *Workshop in a Box*, and [sample documents](#).

### **Georgia**

Georgia, with assistance from the ESC community, passed a constitutional amendment earlier this decade that allowed for GESPC in the state. Since that time the state program has relied heavily on ESC documents. Currently, the state program is reviewing the *ESC Ten Key Attributes* with a desire to adopt more key program tenets as time goes on. The ESC has also assisted Georgia with [pre-qualified procurement documents](#) to help them streamline and reshape the process in GA.

### **Florida**

ESC documents have recently been used by Florida Department of Agriculture to understand the k-12 market and process.

### **Historical Examples**

The impact of *Program in a Box* resources can be traced back more than a decade and have produced benefits that are measurable and unmeasurable. Some of these examples include:

#### **Arizona**

The State of Arizona used many ESC resources during the time period of 2006 through 2014. Chief among the resources tapped was the ESC collection of *Executive Orders* (E.O.) regarding Energy Savings Performance Contracting. A review of these documents served as the basis for Arizona's Executive Order 2008-29 that established the foundation of vigorous energy efficiency and renewable energy efforts in Arizona public buildings. The E.O. directed all State agencies to work with the Arizona Energy Office in benchmarking buildings and called upon the Arizona Energy Office to accelerate efforts to promote the use of energy performance contracts as an appropriate financing mechanism to fund energy efficiency and renewable energy projects in public infrastructure. This E.O. led to the Arizona Governor's Office of Energy Policy's ARRA-era "Energy Performance Contracting in Schools Program." The program, funded by ARRA, provided a 30 percent buy-down (capital infusion) for schools that entered into an GESPC. Nearly \$50 million worth of projects in 28 schools statewide were undertaken as a result. These projects are saving these schools a combined \$5 million annually on energy bills.

Prior to the Executive Order, the Arizona Energy Office utilized the ESC's Program in a Box resources in establishing a public-private ESC Chapter to educate the marketplace and to address

barriers limiting the effect use of energy savings performance contracting in Arizona at that time. The ESC Chapter identified barriers in the state's statutory language that precluded renewable and water savings technologies from being included in an energy savings performance contract. This language was subsequently changed through the legislative process to include all technologies that pay for themselves in energy savings.

In 2014, the State of Arizona released its Master Energy Plan and one of the five initiatives identified in the plan focused on GESPC. The ESC Key Attributes helped guide the plan's language that called for the development of a standardized GESPC contract with buy-in from the Arizona State Procurement Office and Arizona Attorney General Office. The plan also called for an updated prequalified list of ESCOs from which state agencies and school districts could procure. The ESC documents again were used for this Key Attribute, and a list of pre-qualified ESCOs is still maintained in Arizona.

### **Kentucky**

Kentucky has used various ESC documents and guidelines dating back to 2003. In 2003, the Kentucky Chapter developed the original ESC workshop documents. The workshop template was used in organizing the Commonwealth's first GESPC workshop in Cave City, KY.

Over time Kentucky ESC Chapter has used the committee guidelines ([www.energyservicescoalition.org/chapters/resources](http://www.energyservicescoalition.org/chapters/resources)) to form and staff committees. The Kentucky Finance Cabinet worked with the ESC to compare contracts and RFP documents with the ESC versions for incorporating best practices and other items to better the state's documents.