Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

CSG, Bainbridge Island, Washington, Summary of Reported Data From July 1, 2010 – September 30, 2013

Better Buildings Neighborhood Program

Report Produced By:
U.S. Department of Energy
June 2014

U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy

ACKNOWLEDGMENTS

This document presents a summary of data reported by an organization awarded federal financial assistance (e.g., grants, cooperative agreements) through the U.S. Department of Energy's (DOE's) Better Buildings Neighborhood Program (BBNP) from July 2010 or September 2010 through September 30, 2013. Although some awards have been extended into 2014, only the data reported through the end of September 2013 are included in this document.

We would like to thank the BBNP recipients who submitted these data, reviewed the information in this document, and provided revisions. We appreciate their perseverance and patience with the reporting process.

We would also like to thank Rebecca Ciraulo and Aayush Daftari at Navigant Consulting and Dave Roberts and Mike Heaney at the National Renewable Energy Laboratory (NREL) for compiling the quarterly information and the graphs and tables for this report.

Please contact Dale Hoffmeyer at betterbuildings@ee.doe.gov with any questions about this report.

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Awardee Number	Recipient Name	State	Total Grant
3805	CSG, Bainbridge Island	Washington	$4,884,614[1]

1.1 Introduction

This document presents a summary of data reported by an organization awarded federal financial assistance (e.g., grants, cooperative agreements) by DOE's BBNP from July 2010 or September 2010 through September 30, 2013. Although some awards were extended into 2014, only the data reported through the end of September 2013 are included in this document.

This document is not an evaluation of the recipient's BBNP program or a final report of the recipient's activities. The purpose of this document is to provide a summary of data reported quarterly by recipients. As the programmatic and building upgrade project data reported quarterly by each recipient is released, it will be available on the BBNP website at http://energy.gov/eere/better-buildings-neighborhood-program/progress. This report may be useful to researchers and others who plan to study what recipients reported.

This document, and one like it for each BBNP award recipient, follows a similar structure with graphs and tables. Each document includes the following sections: Funding Synopsis, Program Design Synopsis, Driving Demand Synopsis, Financing Synopsis, Workforce Development Synopsis, and Energy Savings Synopsis. A similar document showing results from all BBNP recipients titled *Better Buildings Neighborhood Program Summary of Reported Data* is also available on the BBNP website.

Two additional sources of information may be useful to researchers interested in the accomplishments of BBNP award recipients. The first is an independent evaluation of BBNP conducted by Research Into Action, NMR Group, Nexant, and Evergreen Economics. A Preliminary Process and Market Evaluation report was released in December 2012, and a Preliminary Energy Savings Impact Evaluation report was released in November 2013. Final reports will be released in 2014 and 2015. Second, as the recipient's final technical report is completed, it will be available online on the BBNP website. The final technical report was written by the recipient and contains more detailed information about the recipient's

[1] CSG Bainbridge Island, WA Award Summary, Recovery.gov, Accessed June 2014: http://www.recovery.gov/arra/Transparency/RecoveryData/pages/RecipientProjectSummary508.aspx?AwardIdSur=118872

accomplishments and lessons learned. Some recipients conducted independent evaluations of their programs, and the final technical report is a source for locating those evaluations.

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1.2 Source of Data

BBNP included 34 (i.e., 25 Topic 1 and 9 Topic 2) competitively awarded Recovery and Reinvestment Act (ARRA or Recovery Act)-funded Energy Efficiency Conservation Block Grants (EECBGs) and 7 competitively awarded FY10-funded State Energy Program (SEP) cooperative agreements. Topic 1 EECBGs were awarded at the beginning of June 2010, Topic 2 EECBGs were awarded in August 2010, and SEP agreements were awarded in October 2010. The first Quarterly Program Reports were due from recipients for Q4-2010 (grant start date through December 30, 2010) regardless of when the awards occurred.

All BBNP financial assistance agreements were originally set to expire between May and September 30, 2013. Four EECBGs awards were completed in 2013 (i.e., Toledo, Ohio; Connecticut; Omaha, Nebraska; and University Park, Maryland).The remaining agreements were modified to expire in 2014. For awards with an extended expiration date, the BBNP spending in this report will not equal the total awarded amount.

Organizations that received federal financial assistance under BBNP were required to submit a quarterly Federal Financial Report (SF-425), DOE Progress Report, and a BBNP Program Report. Most of the information in this document is based on recipient's' BBNP Program Report submissions. A copy of the BBNP Program Report (Excel Template) may be obtained by emailing betterbuildings@ee.doe.gov. Recipients were also given the option to submit Program Report information via XML Web service.

EECBG awards were funded by the American Recovery and Reinvestment Act (ARRA or Recovery Act). All federal recipients of ARRA funds were required to submit quarterly ARRA reports, in addition to agency-specific reports, via the ARRA federal reporting website. Information reported under the authority of ARRA is available on www.recovery.gov. Estimated job creation information in this report was obtained from www.recovery.gov.

EECBG (34) and SEP (7) awards had slightly different mandatory reporting requirements for BBNP Quarterly Program Reports. For example, reporting job hours worked was mandatory for EECBG awards and voluntary for SEP. Reporting workers trained and certified was mandatory for SEP awards and voluntary for EECBG. Reporting the number of active contractors performing building upgrades under the program was mandatory for EECBG awards and voluntary for SEP.

1.3 Data Quality

The data summary provided in this document is based on information recipients formally submitted to DOE using the BBNP Quarterly Program Report or ARRA report (EECBG only). Recipients reported quarterly totals for some information like spending, estimated energy savings, assessments completed, and workers trained or certified. Information like invoiced cost and loan amount was reported for each upgrade project. A total invoiced cost or loan amount is obtained from summing all the values reported for each upgrade project record that included this information. Estimated energy savings was reported as a total for the quarter and an estimate was reported for each upgrade project. Where appropriate, the percent or quantity of upgrade projects that had complete information has been indicated. These upgrade project records were used to determine some values in the figures and tables.

The data reported by recipients may include three types of errors: non-response, incorrect response, or processing errors.

Non-Response: Although some data in the BBNP Program Report was mandatory and other information was optional, not all recipients consistently reported the mandatory data elements. Missing mandatory data elements can be characterized as not available, not applicable, or not reported.

Incorrect Response: Data reported by recipients could be incorrect because the requested information was not understood; there was a lack of attention to detail; or information was misrepresented.

Processing Errors: Data reported could also be incorrect because of errors introduced when extracting the data from Program Reports and loading it into a central database. Processing errors can also be introduced when querying the central database to provide summary information.

DOE made several attempts to ask recipients to provide missing information and to verify the information that was reported. For example, recipients were provided a summary of what had been reported and a list of data quality issues following each quarterly reporting period, along with numerous requests to correct errors.

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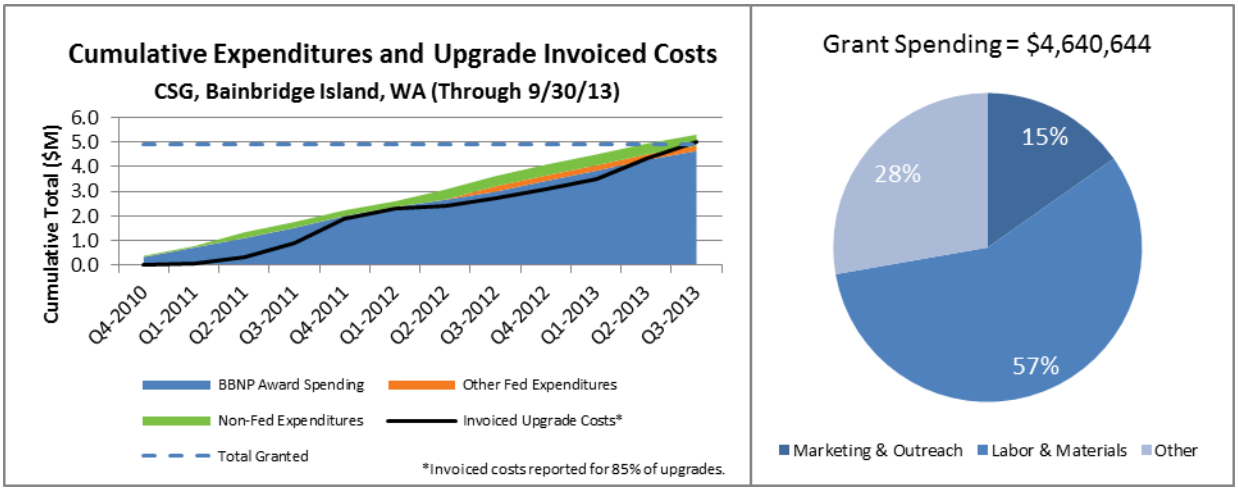
1.4 Funding Synopsis

Conservation Services Group (CSG) received a $4,884,614 EECBG for the Bainbridge Island Energy Challenge. Figure 1 shows total recipient expenditures, other federal expenditures,[2] and non-federal expenditures[3] (e.g., leveraged spending) compared to the total investment in building upgrades (reported as invoiced cost). The total BBNP award spending and the total investment for building upgrades was about equal, however invoiced cost was only available for 85% of reported upgrade projects.

Figure 1. CSG, Bainbridge Island Cumulative Expenditures and Upgrade Invoiced Costs



The pie chart in Figure 1 shows recipient-reported spending by category. Fifteen percent was spent on marketing and outreach activities; 57% on labor and material expenses associated with energy assessments or building improvements; and 28% on other program expenses.

[2] Other federal expenditures may include additional federal financial assistance award funds or loans from DOE or another federal agency.

[3] Non-federal expenditures may include third-party, in-kind contributions and the portion of the costs of a federally assisted project or program not borne by the federal government. This should include building owner contributions to building upgrade project cost.

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1.5 Program Design Synopsis

CSG operated RePower Bainbridge, a program designed to reduce energy use on Bainbridge Island, Washington, by 15% over three years. The program was designed to utilize a combination of free home energy check-ups, free Puget Sound Energy HomePrint™ Assessments, Environmental Performance Score (EPS) assessments, and energy efficiency improvements to residences and businesses. RePower Bainbridge leveraged BBNP funding to provide financing opportunities for energy efficiency improvements and create new jobs for contractors.

To achieve its goals, the program targeted older homes for energy assessments and improvements. RePower Bainbridge offered homeowners two options to evaluate and improve their homes' energy performance: a free home energy check-up, or a home energy assessment with EPS.

During home energy check-ups and HomePrint Assessments, a RePower energy advisor visited homes to visually identify areas of energy loss such as insulation, gaps, cracks, and inefficient equipment. Homeowners received a list of custom recommendations, which included information on no-cost and low-cost upgrades and long-term, energy-saving measures. The energy advisors also provided free compact fluorescent light bulbs and up to two high-performance showerheads.

A home energy assessment with EPS provides an in-depth assessment using advanced building science tools to show how a home's systems, from heating and cooling to insulation and windows, work together to impact the overall efficiency. Homeowners received an EPS, which documents the home's current energy use and carbon footprint, and detailed energy upgrade recommendations and options. The report also included expected monetary and energy savings potential and payback periods.

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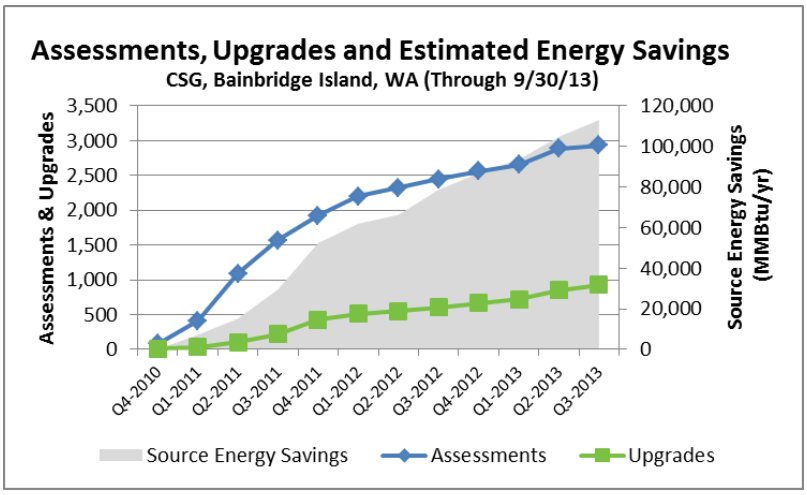
1.6 Driving Demand Synopsis

RePower partnered with Positive Energy, a local nonprofit, to develop an innovative Island Energy Dashboard, which displays real-time energy use around the island. These dashboards were featured in local businesses and on commuter ferries to and from Seattle and other neighboring cities. RePower also worked with Puget Sound Energy to distribute RePower Home Energy Reports, which showed how a home's energy use compares to 100 of his or her neighbors.

Taking energy awareness further into the social media arena, RePower partnered with MyEnergy.com, allowing users to earn retailer discounts for reduced energy use, create groups, compare their energy use with friends and homes nearby, and create common goals for their energy groups to achieve.

Figure 2 shows the cumulative energy assessments and upgrades reported by CSG, Bainbridge Island from all building sectors through September 30, 2013, and the estimated annual source energy savings[4] (right axis).

Figure 2. CSG, Bainbridge Island Assessments, Upgrades, and Estimated Savings



	Residential Single-Family	Residential Multi-Family Units	Commercial Buildings	Industrial Buildings	Agricultural Buildings
Assessments	2812	0	115	0	0
Upgrades	928	0	0	0	0

[4] Source energy, also called primary energy, is the amount of fossil fuels and electricity plus the losses associated with the production of electricity (i.e., losses that occur in the generation, transmission, and distribution). Total estimated source energy savings was calculated by DOE. See Appendix B.

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1.7 Financing Synopsis

(Financing Investments and Results table is not included because no data were reported).[5]

RePower offered homeowners and businesses in Bainbridge, Bremerton, and Kitsap County the opportunity to make energy efficiency improvements by providing loans, RePower incentives, and rebates from Puget Sound Energy and Cascade Natural Gas Corporation. The City of Bainbridge Island and Kitsap Credit Union partnered to create an Energy Efficiency Loan Program, which offered customers low-interest loans for energy efficiency improvements. Homeowners who completed a home energy assessment with EPS were eligible for a limited-time $350 instant rebate from Kitsap County. RePower offered $400 RePower Rewards for customers who completed two or more of the priority recommendations received during their energy assessment. In addition, they were eligible for a $450 HPwES rebate from Puget Sound Energy when they completed three energy efficiency improvements prioritized by an energy advisor.

[5] Recipient provided aggregated data on the number of loans and total loan amount: 64 grants with a total amount of $566,847.

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1.8 Workforce Development Synopsis

Table 1 shows the total number of workers trained and certified as reported by recipients. Most recipients reported the number of workers trained and certified each quarter; the table shows the cumulative total through September 30, 2013. The table also shows the number of active participating contractors reported by recipients for one quarter. The number of participating contractors may increase or decrease each quarter. However, it is not summed across quarters because many of the same contractors actively participated during multiple quarters. Therefore, only the number of participating contractors reported in the most recent quarter is provided in the table.

Table 1. Workforce Development Results (Through September 30, 2013)

Workforce Development Results[6] (Through 9/30/13)	
Number of Trained Workers	129
Number of Certified Workers	29
Active Participating Contractors (Q3-2013)	16

To foster local energy efficiency jobs, the Local RePower Trade Ally Network was created for Kitsap County contractors. RePower also teamed with Olympic Community College in Bremerton to train additional energy advisors and weatherization professionals. To increase the quality of work, RePower required contractors acquire U.S. Environmental Protection Agency Lead-Safe certification and BPI certification.

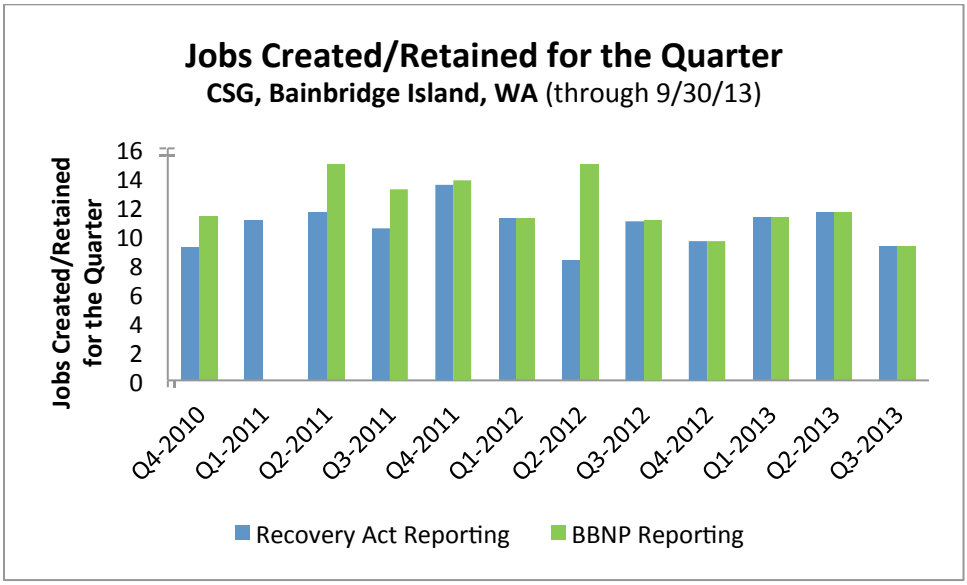
Figure 3 shows jobs created or retained. EECBG recipients were required to report jobs created or retained expressed as ‘‘full-time equivalent’’ (FTE) for Recovery Act reporting. The Recovery Act reporting specified direct jobs created and retained by sub-recipients and vendors. This information is in blue in Figure 3.

EECBG recipients were asked on the BBNP Program Report to report hours worked per quarter directly funded by BBNP funds, as well as hours worked administrating or working on the BBNP program if funded by other federal and leveraged funds (e.g., state and local funds, utilities, financial institutions, private contributions, etc.). This includes but is not limited to administrative staff, consultants, and contractors involved in the management or deployment of BBNP-related building upgrades and assessment activities. This information is in green in Figure 3 and is estimated based on total hours worked during the quarter reported by the

[6] Reporting the number of trained and certified workers was mandatory for SEP and voluntary for EECBG. Reporting the number of active contractors was mandatory for EECBG and voluntary for SEP.

recipient divided by 520 hours per quarter. The BBNP Program Report definition was broader than direct jobs reported for the Recovery Act and is one reason why Recovery Act Reporting and BBNP Reporting in Figure 3 differ.

Figure 3. CSG, Bainbridge Island Jobs Created/Retained for the Quarter[7]



[7] Reporting job hours worked was mandatory for EECBG and voluntary for SEP. ARRA Reporting only includes EECBG data.

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1.9 Estimated Energy Savings Synopsis

Recipients reported estimated energy savings in two ways. First, recipients were asked to report estimated savings data quarterly: total kilowatt-hours (kWh) of electricity, therms of natural gas, gallons of fuel oil, and gallons of propane saved, along with dollars in energy costs saved. Table 2 shows the total estimated annual energy savings of the recipient's activities reported through September 30, 2013.

Table 2. Estimated Annual Energy Savings (Through September 30, 2013), as Reported in Program Summaries

Estimated Annual Energy Savings (Through 9/30/13)	
kWh Electricity	8,685,422
Therms Natural Gas	5,730
Gallons of Oil	46,972
Gallons of Propane	47,785
Total Estimated MMBTU Savings (Source Energy)[8]	112,989
Total Estimated Energy Cost Savings	$2,554,922

Secondly, recipients were asked to report estimated savings data quarterly for each upgrade project. Table 3 shows the sum of the estimated energy savings of all building upgrade projects reported by the recipient through September 30, 2013. The second column shows the number of upgrade projects that were summed to estimate the energy savings in the third column.

Table 3. Sum of Estimated Annual Energy Savings (Through September 30, 2013), as Reported for Individual Upgrade Projects

Sum of Estimated Annual Energy Savings (Through 9/30/13)		
	Number of Projects Summed	**Sum of Estimated Savings Reported**
kWh Electricity	791	6,104,125
Therms Natural Gas	30	5,716
Gallons of Oil	98	46,946
Gallons of Propane	75	52,761
Sum of Estimated Annual Energy Cost Savings	907	$924,151
Reported Method(s) of Savings Prediction	DEEMED SAVINGS, NEAT, REM/RATE ENERGY MODELING	

[8] Total estimated source energy savings was calculated by DOE. See Appendix B.

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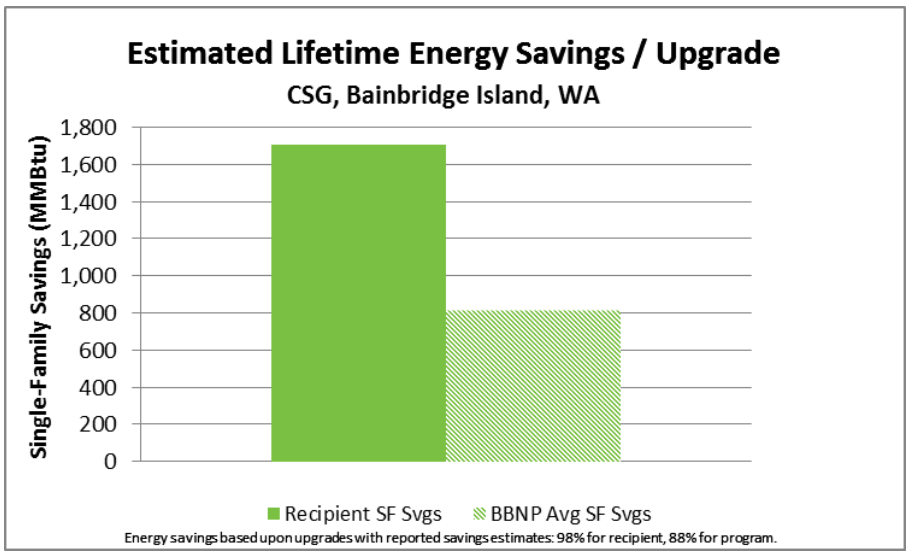
The program-reported total in Table 2 will not necessarily equal the sum of estimated savings in Table 3. Recipients were originally asked to only report individual building upgrade projects that were estimated to achieve at least a 15% reduction in total building energy use. Recipients were also told to include estimated energy saving from all upgrades in their program summaries, including upgrades that achieved less than a 15% reduction in total building energy use, in their program totals. In 2012, recipients were given the option to continue to report only building upgrade projects that saved 15% or to report all building upgrade projects so long as the total portfolio of projects (by building sector) achieved an average savings of 15%. In addition, the recipient did not report individual commercial upgrade project data but included the estimated saving from commercial upgrades in the total program savings in Table 2.

1.9.1. Estimated Lifetime Energy Savings per Upgrade Analysis

From the beginning of BBNP, recipients expressed interest in understanding how their results compared to other recipients. Figure 4 shows an estimated lifetime energy savings per upgrade for the recipient and an average estimated lifetime energy savings per upgrade based on all BBNP-reported projects. This analysis was completed by NREL using recipient-reported project information. The methodology used to complete the analysis is provided in the Appendix C. Eighty-eight percent of the reported BBNP upgrade projects were used in the analysis to calculate the BBNP average because energy savings estimates were missing or incomplete for 12% of reported projects.

Figure 4. Estimated Lifetime Energy Savings / Upgrade[9]



[9] SF is single-family home.

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There could be several reasons why a recipient's results are higher or lower than the BBNP average. Recipients implemented a variety of program design approaches, including different mixes of energy efficiency measures, and targeted different building types and customer segments. Reviewing the summary report of other recipients may provide insights into program design choices and other factors that could influence results.

In addition to program design decisions, other factors could influence results. For example, programs in more energy-intensive climates may be able to achieve greater savings per upgrade because average energy consumption is higher than the national average. Programs in states with high energy costs may find that customers are more motivated to save more energy than states with low energy costs.

APPENDIX A: GLOSSARY OF TERMS

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ARRA or Recovery Act:	American Recovery and Reinvestment Act of 2009
Active Participating Contractors:	Active contractors are qualified (qualified according to the individual recipients' program guidance) contractors who have performed one or more building upgrades in the reporting quarter.
Assessments:	Expert review of a building's energy savings opportunities, which typically includes an onsite inspection of the building and its systems and results in recommendations for building energy performance improvements.
BBNP:	Better Buildings Neighborhood Program
BBNP Award Spending:	Total outlay amount for recipients through 9/30/13
Certified Workers:	Number of workers with a nationally-recognized certification. Recipients could choose to adopt an alternative to nationally-recognized certification and provide a justification for the alternative certification chosen.
EECBG:	Energy Efficiency Conservation Block Grant
IRBD:	(Interest Rate Buy-Down) Program administrators provide lenders or investors with an up-front payment when a financial product is originated to reduce the interest rate a customer pays. The payment is typically the present value of the difference between the interest rate the customer will pay and the "market" interest rate of the financial product over the expected life of the financial product.
Invoiced Upgrade Costs:	Total cost of the building energy efficiency upgrades, as invoiced by the contractor performing the work, which includes the building owner's contribution, and any incentives or grants funded by BBNP funds, other federal funds or non-Federal sources intended to reduce the building owner's cost.

APPENDIX A: GLOSSARY OF TERMS

Jobs Created/Retained:	For the purpose of Recovery Act reporting jobs created and retained was estimated based on the job hours directly funded with BBNP funds during a reporting quarter divided by 520 hours per quarter. EECBG recipients were required to report jobs created or retained expressed as ‘‘full-time equivalent’’ (FTE) for Recovery Act reporting. The Recovery Act reporting specified direct jobs created and retained by sub-recipients and vendors. For the purpose of BBNP Quarterly Program reporting, jobs created and retained was estimated based on the job hours worked directly funded with BBNP funds and job hours worked funded by other federal funds and leveraged funds (i.e. state and local funds, utilities, financial institutions, private contributions, etc.) during a reporting quarter divided by 520 hours per quarter. This includes, but is not limited to; administrative staff, consultants, and contractors involved in the management or deployment of assessment and building upgrade activities. The BBNP Program Report definition was broader than direct jobs reported for the Recovery Act
LLR:	(Loan Loss Reserve) A form of credit enhancement through which a program administrator (or other entity) promises to pay a lender some portion (less than 100%) of losses the lender endures on a financial product or pool of financial products. 5% to 20% LLRs are common.
Labor & Materials:	Recipient outlays of BBNP award funds incurred as part of an assessment or upgrade directly associated with the installation of energy efficient equipment, appliances, or building components (e.g. insulation, windows, etc.). This includes incentives or grants to reduce a building owner’s labor or material costs to complete and energy assessment or upgrade.
Marketing & Outreach:	Recipient outlays of BBNP award funds for communication activities designed to identify, reach and motivate potential customers to participate in a program and learn more (e.g. assessment or other informational activity) about energy efficiency or initiate an energy efficiency upgrade.
MMBtu	One million British thermal units (Btu).

APPENDIX A: GLOSSARY OF TERMS

Multi-Family Unit:	A unit in a building with multiple housing units--a structure that is divided into living quarters for two or more families or households in which one household lives above or beside another. This category also includes houses originally intended for occupancy by one family (or for some other use) that have since been converted to separate dwellings for two or more families.
Non-Federal Expenditures:	These may include third-party, in-kind contributions and the portion of the costs of a federally assisted project or program not borne by the Federal Government. This should include building owner contributions to building upgrade project cost.
Other Federal Expenditures:	These may include additional federal financial assistance award funds or loans from the Department of Energy or another federal agency.
Other Program Expenses:	Recipient outlays of BBNP award funds not classified as labor & materials or marketing & outreach. These expenses are often associated with program overhead. Outlays are distinct from DOE's definition of expenditures, which is most relevant with financing programs (i.e., Funds drawn down and provided by the recipient to a third party, to capitalize a loan fund, are considered outlays. Funds drawn down by the recipient to capitalize a loan fund in-house are not considered outlays until the funds are loaned out.).
RLF:	(Revolving Loan Fund) Funds of capital used to provide loans for energy efficiency and renewable energy improvements; loan repayments recapitalize the funding pool to enable additional lending.
SEP:	State Energy Program
Single-Family:	A housing unit, detached or attached, that provides living space for one household or family. Attached houses are considered single-family houses as long as they are not divided into more than one housing unit and they have an independent outside entrance. A single-family house is contained within walls extending from the basement (or the ground floor, if there is no basement) to the roof. A mobile home with one or more rooms added is classified as a single-family home. Townhouses, row-houses, and duplexes are considered single-family attached housing units, as long as there is no household living above another one within the walls extending from the basement to the roof to separate the units.

APPENDIX A: GLOSSARY OF TERMS

Source energy:	Also called primary energy, is the amount of fossil fuels and electricity plus the losses associated with the production of electricity (i.e., losses that occur in the generation, transmission, and distribution).
Total Capital (Private and Other non-BBNP) Leveraged for Lending:	Capital committed by one of more third parties for financing energy efficiency building upgrades. This can include federally funded (non-BBNP) revolving loan funds and private capital from credit unions, banks or other financial institutions.
Trained Workers:	Number of workers trained under a nationally-recognized organization or curriculum. Recipients could choose to adopt an alternative to nationally-recognized training and provide a justification for the alternative training chosen.
Upgrades:	Also called building upgrades or retrofits, an individual or group of measures that a customer undertakes to improve building performance, with benefits including more efficient energy use, improved comfort and indoor air quality, ensured combustion safety, and lower utility bills.

APPENDIX B: METHODOLOGY TO CALCULATE SOURCE ENERGY SAVINGS

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DOE used the following methodology to calculate source energy savings:

$$E_{svgsv} = \sum_{i=Energy\ Typep} E_{svgs\ source,i}$$

$$E_{svgs\ source,i} = E_{svgs\ site,i} \times CF_{MMB\ u,i} \times CF_{Siteito\ Source,i}$$

where,

E_{svgs} is the total annual energy savings in MMBtu
$E_{svgs\ source,i}$ is the annual source energy savings in MMBtu for each energy type *i* as shown in Table B- 1
$E_{svgs\ site,\ i}$ is the total estimated annual site energy savings for each energy type *i* as shown in Table B- 1
$CF_{MMBtu,\ i}$ is the MMBtu conversion factor for each energy type *i* as shown in Table B- 1
$CF_{Site\ to\ Source,\ i}$ is the site to source conversion factor for each energy type *i* as shown in Table B- 1.

Table B- 1. MMBtu and Site to Source Conversion Factors by Energy Type

Energy Type	MMBtu Conversion Factor	Site to Source Conversion Factor
Electricity	0.00341214 MMBtu/kWh	3.365
Natural Gas	0.1027 MMBtu/ccf	1.092
Natural Gas	0.1 MMBtu/therm	1.092
Fuel Oil (Type 2)	0.14 MMBtu/gallon	1.158
Propane/LPG	0.09133 MMBtu/gallon	1.151
Kerosene	0.135 MMBtu/gallon	1.205
Wood	20 MMBtu/cord	1

APPENDIX C: LIFETIME ENERGY SAVINGS CALCULATIONS

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The Lifetime Energy Savings, LES, is the total source energy savings over the expected life of the installed efficiency upgrades, expressed in MMBtu. An LES value is calculated for each grant recipient as follows:

$$LES_r \times = E_{svgs,r} \times \overline{L}_r$$

where,

LES_r is the Lifetime Energy Savings for grant recipient *r*

$E_{svgs,r}$ is the total estimated annual energy savings for all projects reported by the recipient (MMBtu/yr)

$\overline{L}_r$ is the project weighted lifetime of the efficiency upgrades reported by a recipient, expressed in years and calculated as follows:

$$\overline{L}_r = \frac{\left(\overline{L}_{res} \times E_{svgs,res}\right) + \left(\overline{L}_{com} \times E_{svgs,com}\right)}{\left(E_{svgs,res} + E_{svgs,com}\right)}$$

where,

$\overline{L}_{res}$ is the source energy-savings-weighted lifetime of the residential efficiency upgrades installed for a recipient

$E_{svgs,res}$ is the total estimated annual source energy savings in MMBtu for all residential upgrades reported by the grant recipient

$\overline{L}_{com}$ is the project-count-weighted lifetime of the commercial efficiency upgrades installed for a recipient

$E_{svgs,com}$ is the total estimated annual source energy savings in MMBtu for all commercial upgrades reported by the grant recipient

$\overline{L}_{res}$ is calculated as follows:

$$\overline{L}_{res} = \frac{\sum_{i=1}^{4}\left(Cnt_i \times E_{svgs,i} \times L_i\right)}{\sum_{i=1}^{4}\left(Cnt_i \times E_{svgs,i}\right)}$$

where,

i is the type category of efficiency upgrades installed as shown in Table C- 1.

Cnt_i is the number of energy efficiency upgrades of type *i* installed by a recipient

$E_{svgs,i}$ is the assumed annual energy savings in MMBtu for each energy efficiency upgrade of type *i* as shown in Table C- 1.

APPENDIX C: LIFETIME ENERGY SAVINGS CALCULATION

L_i is the assumed lifetime in years for energy efficiency upgrades of type *i* as shown in Table C- 1.

Table C- 1. Residential Project Energy Upgrade Categories, Lifetimes and Energy Savings[10]

Type Category	Description	Assumed Lifetime (Years)	Assumed Source Energy Savings (MMBtu/yr/measure)
R1	Simple direct-install measures including CFL's, low-flow showerheads, water heater blankets, HVAC tune ups and other low cost measures	5	0.5
R2	HVAC replacement, programmable thermostats, refrigerators, dishwashers, hot water heaters and any large appliance	15	7
R3	Duct sealing and duct insulating	15	10
R4	House air sealing, house insulating, window replacement and any other insulating (except duct insulating)	20	20

$\overline{L}_{com}$ is calculated as follows:

$$\overline{L}_{como} = \frac{\sum_{j=1}^{4}(Cn_j \times L_j)}{\sum_{j=1}^{4}(Cn_j)}$$

where,

j is the type category of efficiency upgrades installed as shown in Table C- 2.

Cnt_j is the number of energy efficiency upgrades of type *i* installed by a recipient

L_j is the assumed lifetime in years for energy efficiency upgrades of type *j* as shown in Table C- 2.

[10] Assumed Lifetime for residential measures was estimated by NREL based on a review NAHB Study of Life Expectancy of Home Components, DEER, and consulting with evaluation experts. Assumed Source Energy Savings was estimated/adapted from the Better Building Energy Savings Measure Packages developed by NREL using BEopt. General methodology is documented here: http://www.nrel.gov/docs/fy11osti/50572.pdf

APPENDIX C: LIFETIME ENERGY SAVINGS CALCULATION

Table C- 2. Commercial Project Energy Upgrade Categories and Lifetimes[11]

Type Category	Description	Assumed Lifetime (Years)	Assumed Source Energy Savings (MMBtu/yr/measure)
C1	CFLs, faucet aerators and HVAC tune ups	5	100
C2	Commercial kitchen equipment, thermostats	11	6
C3	HVAC (packaged), refrigeration, hot water heaters, LED and linear fluorescent lighting	15	100
C4	Chillers, boilers, PV, solar thermal, insulation, windows	20	100

[11] Assumed Lifetime for commercial measures was estimated by NREL based on a review of DEER and consulting with evaluation experts. Assumed Source Energy Savings was derived using regression analysis of reported commercial projects with energy savings and installed measures. A measure may include several instances of one technology installed in a project.

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