



THE CENTER FOR
CLIMATE STRATEGIES

Grantee	State	Sector(s)	Type	Financing Mechanism(s)	Brief Description
City of Los Angeles	CA	Residential	Efficiency	Revolving Loan Fund, Loan Loss Reserve	Supported efforts to measure energy savings from "advanced" EE retrofits to prioritize efforts, doing lit reviews and finding calculation formulas
City of Los Angeles	CA	Commercial, Residential, Public	Efficiency	Revolving Loan Fund, Loan Loss Reserve, Rebates	Facilitated collaborative planning involving DOE, city agencies, and key stakeholders in planning and prioritizing financing activities
Connecticut Innovations, Inc.	CT	Residential	Efficiency	Revolving Loan Fund, Loan Loss Reserve, Interest Rate Buy-Down, Rebates	Developed a research paper titled "Options for Raising Capital (and Leveraging Public Funds) for Residential Energy Loan Programs" highlighting example programs from around the country
Jacksonville/Duval County/SEEA	FL	Residential	Efficiency	Interest Rate Buy-Down, Loan Loss Reserve	Grantee has established a lending program with bank partners. We are developing methods of marketing program to customers and contractors.
Sarasota County	FL	Residential, Commercial	Efficiency	Revolving Loan Fund, Loan Loss Reserve Fund	County has a deferred payment loan program for low-income households. We worked with county on the possibility of creating an additional loan program for middle and upper income residents and businesses. We completed an assessment of the energy efficiency market in the county.
Atlanta	GA	Residential, Commercial	Efficiency	Loan Loss Reserve	Provided sample loan loss reserve documents
Georgia Environmental Finance Authority (GEFA)	GA	Public	Efficiency	Qualified Energy Conservation Bonds	State is looking to establish a green community fund for public buildings capitalized with Qualified Energy Conservation Bonds. We have been providing technical and legal assistance.
State of Hawaii	HI	Residential, Commercial	Efficiency	Loan Loss Reserve	Helped state implement a loan loss reserve program with multiple lending partners. Currently developing a household modeling tool to help the state market their established program

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Ankeny	IA	Public	Efficiency	Utility Franchise Fee	Ankeny considered various financial incentives for residential and commercial energy efficiency improvements. Provided information on similar programs around the country.
Dubuque	IA	Commercial	Efficiency	Revolving Loan Fund	Request from grantee was cancelled due to lack of response
Chicago Metropolitan Agency for Planning	IL	Residential, Commercial	Efficiency	Loan Loss Reserve	Assisted in the issuance of an RFP for program administrator for CMAP's loan loss reserve funds
Fort Wayne	IN	Commercial	Efficiency	Revolving Loan Fund	Provided technical support on potential creation of a commercial lending program. City ultimately decided not to pursue loans and instead created a rebate program
Bowling Green	KY	Commercial	Efficiency	Revolving Loan Fund	
Louisville	KY	Commercial, NGO, Public	Efficiency	Revolving Loan Fund, Rebates,	Provided examples of commercial revolving loan fund programs proposed by EECBG recipients. Also provided examples of NGO energy efficiency grant programs.
Boston	MA	Commercial, Residential	Efficiency	Revolving Loan Fund, Qualified Energy Conservation Bonds	Provided documents, spreadsheet tools, and research
Lowell	MA	Commercial	Efficiency	Revolving Loan Fund, Loan Loss Reserve, Rebates	Assisted with development of their LRF program, including identifying appropriate interest rates and other loan terms; ensuring DBA compliance; and consulting on marketing, outreach, and implementation strategy
Maryland Clean Energy Center	MD	Public	Efficiency	SEP Grant and loan loss reserve.	Assistance was provided in connection with establishing a pooled loan loss reserve fund accessible to participating localities. MCEC also received advice related to public procurement, bonding, and other financing tools available in the context of the current PACE challenges.
State of Maine	ME	Commercial, Residential	Efficiency	PACE	Transferred to Team 5. Served as liaison to other financial expertise including at the DOE and at Lawrence Berkeley National Laboratory

Minneapolis	MN	Commercial	Efficiency	Revolving Loan Fund	Helped structure a commercial RLF. Primarily involved research into questions where they did not have information, such as whether certain types of building upgrades would be eligible for loans, whether NEPA regulations would be invoked in some circumstances, etc.
Kansas City	MO	Commercial	Efficiency	Revolving Loan Fund, Other	Designed an interest buy down program, minimizing potential for lender abuse; developed RLF protocols
Kansas City	MO	Residential	Efficiency	Loan Loss Reserve, Revolving Loan Fund	Developed residential RLF and LLR options; supported city in problematic LLR interactions with lenders, caused by their purchasing department; reviewed agreements
St. Louis County	MO	Residential	Efficiency	Loan Loss Reserve	Document provision for design of program and RFP
State of Missouri	MO	Commercial	Efficiency	Other	Provided information on leveraging the state's authority to issue revenue bonds for trash related facilities as a means to finance EE
Missoula	MT	Residential, Commercial, Public	Efficiency	Revolving Loan Fund, Internal Revolving Energy Fund	Using materials from a webinar I developed with Team 3, helped structure an internal RLF. Questions included where additional sources of capital might be found within the city and what are the best practices for ensuring social and political acceptance of internal RLFs.
Asheville	NC	Residential, Commercial	Efficiency	Loan Loss Reserve, Property Assessed Clean Energy	Provided information on LLR design, discussed PACE and public projects. Helped create Asheville Energy Independence Initiative program design and guidelines.
Charlotte	NC	Residential	Efficiency	Revolving Loan Fund	Reviewed and clarified state and federal law to make sure Charlotte has the legislative authority it needs to set up a financing program. The team incorporated Charlotte staff into a statewide local energy finance roundtable and conducted a follow-up in a conference call.
Greensboro	NC	Residential, Commercial	Efficiency	Loan Loss Reserve, Rebates	Helped city establish a loan loss reserve program with multiple lending partners. Created a market assessment of the potential residential market for energy upgrades. Helping the community integrate financial products into workforce development and contractor trainings

State of North Carolina	NC	Public	Efficiency	Qualified Energy Conservation Bonds	Assisting state in the distribution and use of \$96 million of QECB funds
Raleigh	NC	Public	Efficiency, Renewable	Qualified Energy Conservation Bonds	Provided technical and legal assistance to city regarding possible uses of QECB allocation
Grand Forks	ND	Residential	Efficiency	Revolving Loan Fund	Document provision and encouragement
Santa Fe County	NM	Commercial	Efficiency	Property Assessed Clean Energy	Provided assistance to county on creation of a commercial PACE program capitalized with QECBs. To date, state has not authorized the distribution of QECB allocations to large local governments
Albany	NY	Residential	Efficiency	Revolving Loan Fund	Demonstrated the utility of spreadsheet modeling to identify optimal loan structure and terms, assisted with structuring their residential RLF
Lorain	OH	Commercial	Efficiency	Revolving Loan Fund	Provided information on residential and commercial lending programs as city decided whether or not to pursue an energy finance option
Keizer	OR	Residential, Commercial	Efficiency	Revolving Loan Fund	Provided information on possible establishment of small revolving loan fund
Philadelphia	PA	Public	Renewable	Project Financing	Municipal waste to energy (methane recovery)
Charleston	SC	Residential, Commercial	Efficiency	Revolving Loan Fund, Qualified Energy Conservation Bonds	Provided assistance on possible creation of a residential revolving loan program including financial models of program and a residential and commercial energy efficiency market assessment
Knoxville	TN	Public	Renewable		Provided financing and inter-agency negotiations support for their effort to contract for rooftop PV on their convention center and legal review of their contractual documents to assure compliance with ARRA and the PPA from the TV.
State of Tennessee	TN	Public	Efficiency	Qualified Energy Conservation Bonds	Providing technical and legal assistance on the creation of a statewide green communities program capitalized with QECBs
Laredo	TX	Residential	Efficiency	Revolving Loan Fund	Reviewed contract documents and provisions for administration of the RLF by local fiduciary
Laredo	TX	Public	Renewable	Rooftop Solar PV Contracted	Provided information on using RE credits for financing and installation by a PV energy contractor and Knoxville's write-ups of their work; rooftop systems for 2 recreation centers

Salt Lake County	UT	Public	Renewable	Project Financing	Rooftop solar on convention center
Alexandria	VA	Residential	Efficiency	Revolving Loan Fund	Provided technical assistance on several finance programs including a proposed residential revolving loan program and a power purchase agreement
Charlottesville	VA	Residential	Efficiency	Rebates	Establishing several energy finance programs including an interest rate buy-down and a commercial revolving loan fund. Developed a household modeling tool to help grantee market their established program
James City County	VA	Residential, Commercial	Efficiency	Revolving Loan Fund	Assisting county with their revolving loan program for residents and businesses. Providing assistance on identifying borrowers, contracting, and loan underwriting
Virginia Department of Mines, Minerals & Energy	VA	Commercial	Efficiency	Revolving Loan Fund	Assisting state with implementation of a commercial revolving loan program. Providing program and legal support, sample contracts, RFPs, and documents, and underwriting standards
Madison	WI	Commercial		Revolving Loan Fund	Helped city design program; advised on sources of non-DOE funding and dealing with possible lenders
Madison	WI	Residential	Efficiency	Loan Loss Reserve	Sub grantee from WECC
Milwaukee	WI	Residential	Efficiency	Loan Loss Reserve	Sub grantee from WECC
Milwaukee	WI	Commercial	Efficiency	Qualified Energy Conservation Bonds	Supported city investigation of using QECBs for commercial RLF with legal and econ analysis; city decided against it
State of Wisconsin	WI	Commercial	Efficiency, Renewable		Provided info on SEP leveraging tools used for EE/RE business development loans in other states. State is providing loans and grants to private industry for job-creating EE and RE product and process development, basically using their SEP funds to seed new business or new business product/service development. In some instances, the clients for the processes/products developed may be public, not private, but the funds are going from the state to private businesses.
Wisconsin Energy Conservation Corporation (WECC)	WI	Residential, Commercial	Efficiency	Loan Loss Reserve, Revolving Loan Fund, Other	Supported WECC and its Better Buildings program sub grantees Madison and Milwaukee to develop inter-organizational capacity to negotiate LLRs with lenders

American Samoa		Residential	Efficiency	Revolving Loan Fund	Provided financial modeling, program design support, and legal support to territory regarding the possible creation of a residential revolving loan fund
Southeast Energy Efficiency Alliance (SEEA)		Residential, Commercial	Efficiency	Loan Loss Reserve, Rebates	One engagement assisting the creation of several regional loan loss reserve funds, including lender solicitation, selection, and negotiation. Second engagement assisting SEEA in operating regional energy programs including financial modeling of loans and rebates, lender selection for loan loss reserves, and long term program financial stability beyond grant period
Guam		Residential	Efficiency	Revolving Loan Fund	Provided financial models and research into existing programs for potential implementation of solar hot water revolving loan program in the territory
Eugene	OR	Residential	Efficiency	Other	The grantee was provided with a list of best practices for going about using the EECBG grant funds to begin retrofitting multifamily housing projects.
Henderson	NV	Residential, Commercial	Renewable	N/A	The goal of the project was to utilize natural water flow to create energy using micro-hydro-turbines for residential structures. They tried to bid it out (on our advice) but didn't get sufficiently acceptable responses to proceed. Since only the bidder was interested in pursuing the project, the project did not receive the necessary funding to move forward.
Syracuse	NY	Public	Efficiency	Tax credits to be used to finance the installation of lighting in a municipally-owned parking garage.	The grantee sought legal advice in determining whether a tax credit was appropriate to use as part of a funding stream for the installation of lighting in parking garages owned by the municipality if taken by the manufacturer or the ESCO.