

NASEO MIDWEST REGIONAL MEETING

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy

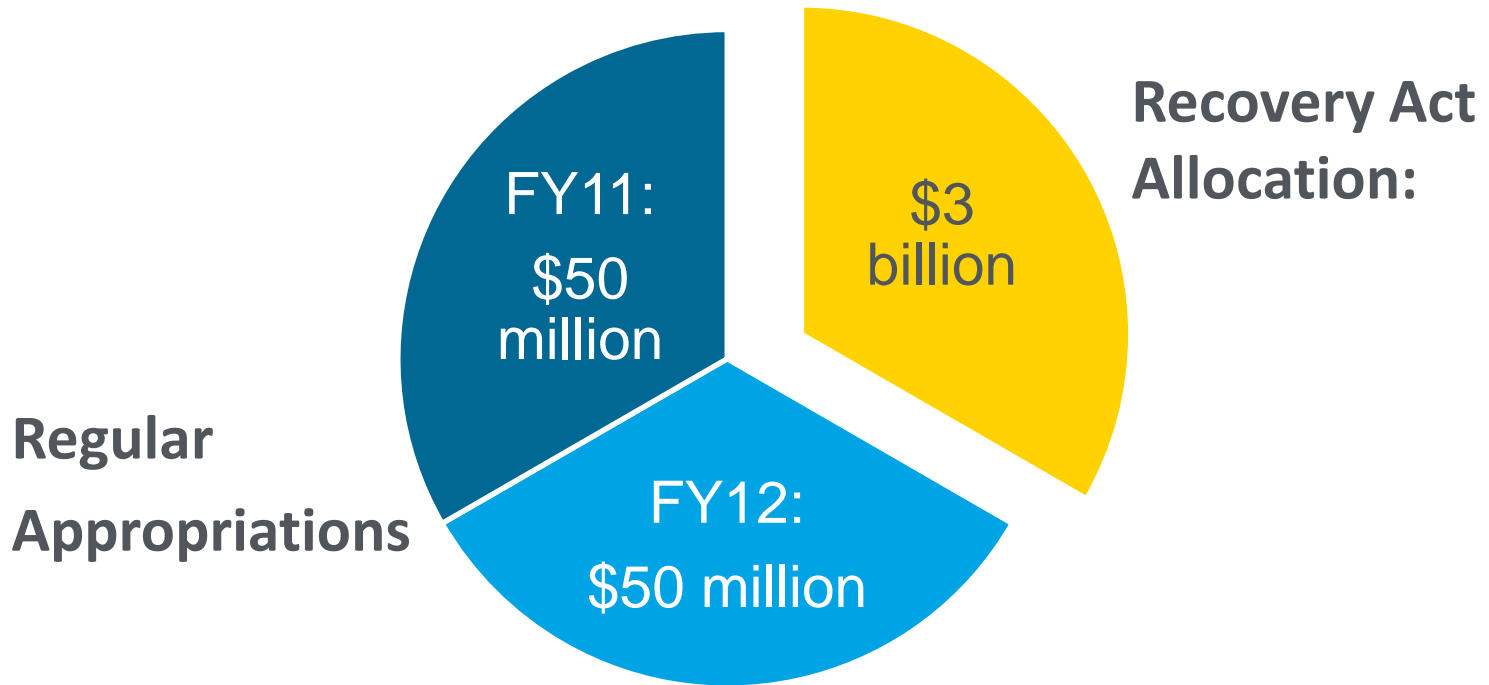


Greg Davoren
Acting Program Manager
State Energy Program

July 19, 2012

State Energy Program (SEP) Financial Report

As of July 16, 2012



Cumulative Recovery Act Spending:

\$2.8 billion (90.5%)

State Energy Program (SEP) Spending Rates

As of July 16:

- Cumulative Payments (DOE receives and pays an invoice from a grantee): **\$2.8 billion (90.5%)**
- Total CX'd (NEPA clearance): **\$3.1 billion (100%)**
- Funds Obligated (funds in a signed contract): **\$2.98 billion (97%)**

% Spent	# of grantees as of January, 2012	# of grantees as of July, 2012
90% +	3	36
70% - 89%	28	18
69% -	25	2
Total % Spent:	69.3%	90.5%
Total \$ Spent:	\$2.1 billion	\$2.8 billion

SEP in the Midwest: Accomplishments under the Recovery Act

As of March 31, 2012

5 out of 8 Midwest States & Territories are over **90% spent** to date!



Contributed to the increased energy efficiency of nearly **4,900 buildings** through the installation of energy upgrades.



Supported the installation of nearly **25,000 kW** of renewable energy systems.

Nearly **1,500 jobs** created or retained in the Midwest in Quarter ending March 31, 2012



Educated nearly **6,900 people** in performing energy audits and upgrades and contributing to the installation of renewable energy systems.

SEP Revolving Loan Funds Performance

SEP and EECBG Grantees placed over \$500 M of their ARRA funds into Revolving Loan Funds (RLFs) in an effort to create self sustaining programs that will support EE/RE into perpetuity

SEP Revolving Loan Funds Performance – March 2012

Sector	Allocation	% of Funds Expended
Generation Investments	\$119M	82%
Retooling/Manufacturing	\$95M	59%
All Sectors EE	\$53M	42%
Commercial EE	\$7M	35%
Public EE/RE	\$202M	46%
Residential EE	\$47M	64%
Industrial EE	\$22M	0%
Grant Total	\$545M	55%

- Funds received by States from legislation, settlements, or judgments relating to violations of oil price controls during the 1970s.
- Major sources of restitutionary funds for oil price control overcharges:

Warner Amendment:

\$200 million in funds distributed under P.L. 95-105 must be used in SEP, WAP, or LIHEAP.

Exxon:

One-time distribution of \$2.1 B; must be used in SEP, WAP, or LIHEAP.

Stripper Well:

Periodic distributions from 1986-2006, totaling over \$2 B. Funds may be used for purposes consistent with SEP, WAP, and LIHEAP or in nine areas related to energy.

Stripper Well funds – Other areas related to energy:

- Highway and bridge maintenance and repair
- Ridesharing
- Public transportation

- Building energy audits
- Grants or loans for weatherization and energy conservation; equipment installation
- Energy assistance programs

- Airport maintenance and improvement
- Reduction in airport user fees
- Energy conservation research

- Warner Amendment funds may not be used for administrative expenses.
- Exxon funds follow the policy established by the Warner Amendment. Funds may not be used for administrative expenses.
- Stripper Well: Up to 5% of Stripper Well funds may be used for administrative expenses. Unlike Warner and Exxon funds, Stripper Well funds are not considered to be Federal funds and may be used as non-Federal match for Federal grant funds.
 - A small amount of funds commonly referred to as Diamond Shamrock funds are treated almost exactly like the bulk of Stripper Well funds. In the case of Diamond Shamrock funds, however:
 - Any amount may be used for administrative expenses as long as this amount does not exceed 5% of the state's total PVE funds
 - States may spend Diamond Shamrock funds outside the programs without prior notification to DOE.

DOE's Responsibilities

- DOE Project Officers review, approve, monitor, etc. funds that are included in SEP and/or WAP State Annual Plans.
 - DOE approves use of funds by approving the annual plan. (DOE has no role in approving use of funds for LIHEAP (HHS)).
- Stripper Well funds are reviewed by DOE to ensure eligibility of use:
 - Use of Stripper Well funds through federal grant program (e.g., SEP, WAP) are reviewed as part of DOE's review of that program
 - Use of Stripper Well funds outside of a federal program must be submitted to DOE for review at least 30 days prior to the expenditure of the funds.
- DOE has responsibility to oversee use of PVE funds, including through annual report to the Court.

States' Responsibilities

- Identify proposed use of PVE funds for a grant program (e.g. SEP) in the annual plan.
- For Stripper Well funds to be used outside of a grant program for an eligible energy-related activity, a State should send a proposal to DOE HQ **30 days** in advance of intended use. This can take place any time during the year.
 - The proposal can be brief (1-2 pages is usually sufficient), but it must include a description of proposed activity, budget, target audience, and time period. It must clearly show the energy focus of the proposed activity. As noted, this prior approval requirement does not apply to Diamond Shamrock funds. **Proposals and all PVE-related materials not included in a grant program Annual Plan should be sent to this dedicated DOE E-mail address: SEP-PVE@ee.doe.gov**
- The States are required to submit Annual Reports to DOE HQ reporting the financial status of remaining funds from all PVE sources as well as how funds have been used during the year. States may file one annual consolidated report covering Exxon, Stripper Well, and Diamond Shamrock funds.
- Annual Reports are officially due 30 days after the close of the State's fiscal year. DOE may grant an extensions, upon a reasoned request by the State.

- **Final Report**
 - Opportunity for States to summarize the results of their investment of ARRA funds
 - Intended to be the aggregation of existing information (RFPs, SOWs, press releases, reports, metrics)
 - Not intended for writing new material or duplicating other reports for the state.
 - Direct questions to your PO
- **Post-ARRA Financing/"Evergreen" Programs**
 - States should continue managing these programs as they have in the past with respect to: DBA, Buy American, NEPA, SHPO, and metrics
- **Property reporting**
 - Guidance will be forthcoming as approval from General Counsel is expected within 30 days.

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A Not-So-Cheesy Approach to Clean Energy Manufacturing

May 30, 2012 - 6:24pm



Thanks to Wisconsin for **Clean Energy Manufacturing Stories !!!**

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Helping Wisconsin Small Businesses Increase Sustainability

June 28, 2012 - 3:51pm





QUESTIONS?

Thank You

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