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# ENERGY SERVICES COALITION

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## CHAPTER PLAYBOOK

Version 3.0

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## Energy Services Coalition Chapter Playbook

The Energy Services Coalition Chapter Playbook is a living document updated regularly and represents an ongoing process of collecting examples of successes and challenges emerging from state programs and state ESC Chapters. The Playbook outlines approaches from around the country of how to operate a successful state ESC Chapter in support of a statewide GESPC public program and to increase GESPC activity in a state. This document is an update of the Version Two compendium that was posted to the ESC website in October 2017.

### **Part I: Chapter Purpose:**

What is the purpose of an ESC Chapter? Chapters serve a critical role in the education of the marketplace. Chapters develop and disseminate state-specific information about energy efficiency and how increased energy efficiency can be provided, encouraged and acquired. The Chapter framework encourages all interested parties to come together to work cooperatively in achieving this primary goal.

A secondary role for Chapters is to serve as a vehicle for members to work together to identify and develop solutions to state-specific issues. When issues arise a well-organized Chapter can provide a local-state specific problem solving capacity to eliminate barriers that impact the use and utilization of performance contracting.

As noted above, most Chapters focus on education and outreach and the reduction of barriers to GESPC as the primary state-specific areas where the Chapter can play a key role. Examples of activities that support these objectives range from a singular activity to multiple activities. Most Chapters have conducted one of the following endeavors in support of fulfilling these concerns:

- Providing outreach and education as a working group of energy experts, both public and private sector about how
  - GESPC can accomplish infrastructure modernization that there are no public funds to support
  - GESPC reduces energy consumption
  - GESPC creates jobs
  - GESPC helps achieve clean air quality goals
  - GESPC can move projects forward that prepare for and recover from energy disruptions
- Working together in a public private partnership to identify barriers to the use of performance contracting and offer solutions to those barriers;
- Recognize successful projects and help maintain case study libraries of project accomplishments and ongoing verification of savings achieved;
- Offer workshops and training seminars to educate all market segments on the benefits of energy performance contracting;



- Assist with and provide support of the development of state and local policies and procedures that enhance the widespread use of energy performance contracting;
- Provide ongoing maintenance of a vibrant, interactive Chapter web page (on the national ESC website) with links to authorizing state laws, PowerPoint presentations, and their state's respective resources making it easy for prospective GESPC users to find and review. Since circumstances vary from state to state, each Chapter should define its own purpose and chart a path of active engagement to fulfill that purpose. Chapters that have a clearly defined purpose and have undertaken a plan to address these issues -- by and large contribute to an increased uptake of GESPC in a state.

## **Part II: Education and Outreach:**

Several Chapters are known for their outreach and education efforts, and official events. These efforts vary from state to state. Below are several examples of Chapter activity in support of education and outreach:

- **Energy Conferences**

An Energy Conference with a focus on GESPC is a great way to promote energy retrofits in the MUSH market. In the past, several Chapters held their own annual conference for the purpose of educating facility owners and decision-makers about GESPC in their state.

The Chapters established a conference committee to plan the logistics and agenda/speakers for the event. An annual conference is a large lift and needs a dedicated planning committee. Examples where an annual conference was a major purpose of the state Chapter include:

- The Delaware Chapter has made an annual conference part of its main activities. In 2019 the Chapter held its 6<sup>th</sup> Annual Energy Conference. The Chapter accepts proposals for session topics. The 2019 conference attracted a full-house with 118 people in attendance and sold out sponsorship opportunities with 17 private sector sponsors.
  - Governor Jake Markell was the keynote speaker at the inaugural Delaware ESC Energy Conference in 2014. Each year the interest, reflected in attendance numbers, has steadily grown.
  - Outcome: The education efforts of the Delaware Chapter have created more opportunities for energy efficiency work in public buildings. The Delaware Sustainable Energy Utility performance contracting program, that is highlighted through conference sessions, is playing a major role in achieving the governor's energy efficiency goals.

Other examples of Chapter's sponsoring conferences include:

- In 2019, the New Mexico ESC Chapter partnered with the NM Association of Energy Engineers to hold its first energy conference at the Sandia Resort and Casino. The Chapter plans to make the conference an annual event.
- The Alabama Chapter held an annual conference and golf tournament for a number of years.
- Pennsylvania held an annual energy conference as a Chapter activity.



- The Tennessee Chapter participated in the planning of several large conferences hosted by other organizations.
- The North Carolina Chapter provides speakers and moderate panels as part of conferences sponsored by other organizations in the state.
- The Kentucky ESC Chapter regularly participates on the conference program of the Kentucky Department of Local Governments. In August 2016, the ESC, Kentucky ESC Chapter and the DLG coordinated conferences within the same week and in the same hotel, thus exposing local government officials attending the DLG annual conference to learn about the GESPC concept at the neighboring ESC Conference and Exhibit Hall.

In addition to state conferences, State Chapters have co-hosted the annual national ESC Market Transformation Conference. As part of the planning committee, Chapters have helped shape the agenda, identify speakers and plan a state-themed reception. State Chapters that have hosted the national conference include:

- Tennessee Chapter: In 2012, the Tennessee Chapter hosted the first national conference in Nashville. The Chapter incorporated a half-day state specific conference that preceded the opening of the national conference.
- Colorado Chapter: The 2013 ESC national conference was held in Denver in conjunction with the Colorado ESC Chapter. The Chapter organized a panel for the agenda that focused on successful GESPC projects in Colorado. The Chapter also awarded 10 conference scholarships to local decisions makers.
- Minnesota Chapter: In 2014, the Minnesota ESC Chapter hosted the annual ESC Conference. A networking reception was held on-board a steam-powered paddle boat on the Mississippi River. Scholarships were awarded to more than a dozen potential state and local end-users to attend the conference.
- North Carolina Chapter: The North Carolina ESC Chapter hosted the 2015 national conference in downtown Charlotte. The Chapter introduced for the first time a scholarship for energy and engineering students from a nearby university.
- Kentucky Chapter: The Kentucky ESC Chapter and the Division of Local Governments hosted the 2016 national conference. The ESC Conference was held immediately preceding the annual DLG conference for local government officials.
- Nevada Chapter: The 2017 ESC annual conference was held in Henderson, Nevada. As has become a tradition the Chapter allocated chapter funds to provide scholarships to public sector end-users in the state.
- Georgia Chapter: The 2018 ESC annual conference was held in Atlanta, Georgia. As part of the conference the Georgia ESC chapter hosted a workshop focused on doing performance contracting work in Georgia.
- Colorado Chapter: The 8<sup>th</sup> Annual ESC Conference was hosted by the Colorado Chapter, becoming the first Chapter to host the annual conference twice.

In addition to annual conferences, Chapters have found that workshops, webinars and forums are another great way to create awareness for GESPC. There are a large number of examples of Chapter efforts in support of this activity:



- A number of Chapters have hosted forums to help local units of government better understand the state's Guaranteed Energy Savings Program and how to use performance contracting to finance energy efficiency improvements.
  - Outcome: Forums allow chapters to address state-specific issues as they arise and to provide education and awareness on issues and solutions independent of a larger conference setting with competing topics.

Examples of workshops, webinars and forums that address state-specific issues include:

- The North Carolina Chapter uses the workshop model to educate potential customers on the GESPC business model.
  - In 2015, the Minnesota ESC Chapter sponsored several successful "Financing Energy Savings Projects for Local Governments and Schools" forums geared toward counties, cities and municipalities, school districts, townships, municipal utilities, and other local units of government to help them better understand GESPC.
  - In 2016, the Minnesota ESC Chapter identified the state correction facilities as an untapped market sector and developed resources and a training workshop focused on correctional facilities and in support of expanding acceptance of GESPC in these facilities.
  - The Massachusetts Chapter has provided education to cities and towns on how to do GESPC projects.
  - The Kentucky Chapter regularly provides training and education to local leaders on GESPC. The Chapter held a series of workshops in 2014 on wastewater treatment plant upgrades using GESPC. These workshops were conducted throughout the state.
  - In 2014, the New York Chapter was instrumental in helping organize and promote a workshop for NYSERDA to launch the state's Green Bank. The workshop introduced the Green Bank and how it could work in concert with energy performance contracting to implement energy efficiency projects in New York.
  - The Alabama ESC Chapter and the Alabama Department of Economic and Community Affairs held a 2018 workshop targeting the MUSH market.
  - In 2019, the Nevada ESC Chapter partnered with Western Resource Advocates to host an Irrigation and Water Efficiency Tour and Demo hosted by Washoe County School District in Reno, Nevada.
  - In 2020, and in response to restrictions on large gatherings, many Chapters are exploring webinars and live virtual trainings as a substitute for in-person gatherings.
- **Fundraising efforts**

Conferences/workshops can be used as a fundraising tool for the Chapter by selling booth spaces to vendors. This can help lower the cost of the event (facilities, refreshments for breaks, meals, materials, etc.) and make the event more affordable for attendees; and can result in a net profit to be used for future activities.



Vendors can include energy service companies, energy equipment suppliers, energy savings performance contracting financial institutions, and third-party contractors that provide support services for ESCOs and public sector facility managers for GESPC projects.

As a nonprofit organization composed of public and private experts from a wide range of organizations it is important to note that sponsorships or speakers are in no way an endorsement of any one organization but instead serve as examples of the work and success of GESPC.

In lieu of in-person gatherings – webinars and live trainings offer opportunities to fulfill the mission of education and with sponsorship opportunities serve as Chapter fundraising.

- **Speakers Bureaus**

Chapters that don't have the resources necessary to stage their own annual energy conference have explored other ways of creating awareness for GESPC. One example is the implementation of a speaker's bureau to provide speakers on behalf of the ESC that present at municipal government and/or school conferences in their state. Smaller Chapters have found this approach is easier as it allows them to benefit from the planning and organizational efforts of larger well-established groups.

Below are examples of a Chapter activity in support of this approach to education and outreach:

- Before hosting its own conference, the New Mexico Chapter developed a standardized power-point for members to use in presentations.
  - Outcome: The standardized power-point has been used by various members of the Chapter, both public and private, to deliver the same pre-approved message in various settings throughout the state. It has also allowed the Chapter to participate in more events as the messaging has already been vetted and is available for all members to use as participants in conferences, panels and small groups.
- The Kentucky Chapter provides speakers for conferences throughout the state to present on behalf of the Chapter and provide examples of GESPC and how it works to new audiences that are not necessarily aware of the concept.
- The Texas Chapter has developed a webinar presentation to deliver as part of its outreach and education efforts in 2020.

State Chapters and its membership have identified a number of potential meeting spaces where the Speakers Bureau concept has been deployed. Those spaces and organizations include but are not limited to the following:

- League of Cities
- County Association
- Association of School Board Officials
- Association of School Administrators





- Plant Managers
- Central Association of College and University Business Officers

### **Part III: Identification of Barriers:**

Below are examples of a Chapter activity in support of reducing barriers to performance contracting:

- Chapters have cited the legacy of bad projects from the past as a barrier that they consistently have to overcome. A committee approach to dealing with this barrier at the local level is one way to overcome this concern.
  - Outcome: The legacy of bad projects is a theme we hear from almost every state as a barrier to overcome. These projects, some of which may be decades old, have the effect of making some public officials hesitant to explore GESPC, let alone enter into an agreement. Several Chapters have not only identified this as a major barrier, but implemented solutions to deal with it. Examples of how Chapters have handled bad projects include promoting success. Promoting success is a powerful counter argument and can take the shape of panel discussions at energy conferences where end-users discuss their experiences, awards that recognize success, and developing media stories that highlight positive examples of GESPC.
- The New Mexico Chapter formed a committee to conduct a bottleneck analysis that identified barriers to GESPC implementation in the state. This analysis tackled implementation issues in an effort to accelerate the cycle time for project implementation.
  - Outcome: The bottleneck analysis identified the need for a pre-qualified vendors list. This action was implemented by the State and New Mexico now has a list of pre-approved ESCOs that has sped up the selection process in the state.

### **Part IV: Recognition:**

In 2015 the ESC identified Recognition as a Key Attribute to program readiness. Recognition was added to the list of Key Attributes as a result of the successful activities at the state Chapter level.

A recognition/award program is a powerful strategy that reinforces the importance and benefits of saving energy in public facilities. High-profile success can help GESPC gain acceptance and encourage others to take similar action.

- The Michigan Chapter has held an annual awards dinner and partners with the Municipal League on Awards and press releases. (The 9<sup>th</sup> Annual Michigan ESC Chapter awards were given in 2019.)
  - Since 2011, Michigan's ESC Chapter has held an annual awards banquet. The projects selected have garnered a great deal of attention and have been featured in various media publications. The media exposure has created greater awareness for energy performance contracting and the process -- but it also has highlighted public officials that have been good stewards of the public trust.



- Press releases and photos recognizing winners are distributed electronically to media outlets throughout the state.
- In 2015, the ESC recognized the Michigan ESC Chapter's Annual Awards Program as a Best Practice and with support of the U.S. Department of Energy, included "Recognition in an updated "10 Key Attributes for GESPC Program Readiness.
- In addition to an awards program, other ways of generating recognition for GESPC is to promote projects for awards offered by other organizations.
  - In 2012, Henderson, Nevada's GESPC project was awarded an Energy Project of the Year in Region V by the Association of Energy Engineers (AEE).
  - In 2013, the American Council for an Energy-Efficient Economy (ACEEE) and the Alliance for Water Efficiency (AWE) recognized the City of Boulder's Energy Savings Performance Contract as an "exemplary program" that saves both energy and water.
- Hawaii State Energy Office has worked closely with the ESC to promote GESPC through announcements and presentations to the legislature that highlight its Race to the Top Award presented by the ESC. In 2019, a press release containing comments from Governor David Ing acknowledged the success of GESPC in the state agencies and institutions in reducing energy consumption.

In addition to awards, some state Chapters have chosen to develop case studies and success stories as a way to promote and recognize success.

- North Carolina promotes successful projects as examples when a new customer is weighing GESPC as an option.
- Kentucky ESC Chapter regularly solicits case studies from its members to submit to the ESC Case Study database.

Social Media has also emerged as a great vehicle to promote project success and Chapter workshops and events. The ESC website hosts Chapter specific webpages outlining program and policies in each of the 27 states that have Chapters. All chapter webpages contain links to a Chapter Facebook page that is updated on a regular basis with administrators being appointed from the state chapters to co-manage the information posted. Presently six states have appointed a Chapter person to assist in the management of their state's ESC Facebook page. Among the Chapters that have committees overseeing the management of their Chapter pages and Facebook page include Georgia, Indiana, Texas, Alabama, Delaware and Kentucky.

#### **Part V: Other Events:**

- The North Carolina Chapter held a job fair for its members.
  - The job fair provided an opportunity for a number of qualified individuals to connect with companies working in the performance contracting space and find gainful employment working in this area.
- The Florida Chapter developed and implemented a five-year (program) plan for its activities.





- Numerous Chapters have held events to celebrate high visibility projects. The Arizona Chapter conducted tours of a GESPC project/building as part of an Earth Day event.
- The Colorado Chapter has explored ways to expand GESPC (i.e. agriculture, private sector, etc).
- The Pennsylvania and Nevada Chapters have produced their own Chapter newsletter.
- Massachusetts has held events for political dignitaries when projects are completed.
- Several Chapters have focused on organization growth and have pursued getting the entire supply-chain involved. The Delaware Chapter has a membership committee whose purpose is to help grow the organization.
- In 2013, the Pennsylvania Chapter pledged its chapter funds and volunteer hours as matching funds as part of a grant application. Although the application was unsuccessful it demonstrates the opportunities that exist for Chapters to leverage their organization to have a larger impact.
- In 2014, the Arizona Chapter presented in conjunction with the state's procurement office as part of a meeting to discuss the RFQ for pre-qualified vendors demonstrating a role for the Chapter in organizing and presenting on specific topic areas that are relevant to both the public and private sectors.
- In 2014, the Georgia Chapter helped a city with background information as it planned a benchmarking ordinance. The effort of the Chapter is in support of outreach activities that are beneficial to both public and private sectors.
- The Delaware ESC Chapter and members participated in a 2015 working group that was assembled by the Delaware Sustainable Energy Utility to address the key findings from the first bond issue by the SEU supporting GESPC.
- The Utah ESC Chapter put together a strategy committee in 2016 to develop a roadmap for outreach efforts with stakeholders to educate them on GESPC.
- The Colorado ESC Chapter held a statewide workshop in the Spring of 2017 to increase awareness of GESPC in the state.
- In March 2017, the ESC conducted a four-day GESPC technical assistance workshop in Arizona with a team representing the State finance, procurement, legal and landlord agencies.
- Twice in 2017, the Nevada ESC Chapter, in partnership with the Nevada Governor's Office of Energy (GOE), held half-day workshops in support of the use of GESPC in Nevada. The second workshop was held prior to the National ESC Conference held August 10-11, 2017 in Henderson, Nevada.
- Seventeen ESC State Chapters developed and distributed "2016 Year in Review" newsletters to highlight successful projects and policy changes in each state during the previous year.
- The Delaware ESC Chapter identified job creation as a benefit of GESPC that could be marketed. In 2017 the Chapter developed a jobs calculator to count jobs related to GESPC projects in the state.
- In 2019, the Texas ESC Chapter exhibited at the Texas Energy Summit and promoted the GESPC business model.
- The Indiana ESC Chapter participated in the state's 2019 Legislative Day at the Indiana Statehouse. ESC members reached out educate decision-makers on the GESPC process and successes in the state.
- In 2019 the Nevada Chapter continued its tradition of holding half-day workshops in support of the use of GESPC by conducting a water workshop for end-users.



## **Part VI: How Often Does a Chapter Meet?**

Chapters meeting schedules vary from state to state, but generally state Chapters meet on a regular basis with a business agenda for the meeting. Meetings range from a couple hours to an hour meeting over lunch. Typical timeframes are monthly or quarterly. Some Chapters have annual events in addition to regular membership meetings, forums, workshops or committee meetings.

Meeting locations is also an area that varies from state to state. Some Chapters have their meeting in the same location on a regular scheduled basis. Other Chapters meet in different geographical locations for the convenience of a wider group of stakeholders.

- The North Carolina Chapter has taken its meetings on the road to generate more public sector involvement and to target small communities and holds an annual Holiday Get-Together for its members

At one time the Pennsylvania Chapter averaged a membership meeting every quarter and meetings rotated between the state's three largest cities, Philadelphia, Pittsburgh and Harrisburg. Committees meet based on the business of the committee. Executive committees meet more often – either in person or using a telephone conference call – as it is the responsibility of the Executive Committee to plan the agenda for the regular membership meeting. Event Committees meet as needed to plan the logistics and details of an upcoming event.

## **Part VII: Chapter Code of Conduct**

Chapters are encouraged to abide by a common code of conduct adopted by the national board in 2011 as a guide for the state chapter members.

### **Code of Conduct**

This *Code of Conduct* is written and by membership agreed to insure a standard of conduct for the Energy Services Coalition (ESC) to follow when interacting with state agencies, other professional organizations, institutions and clients when representing ESC; and to establish a standard of participation that is expected of all existing and prospective members.

1. Each member will be presented a copy of this Code of Conduct. When joining a state Chapter, each member will be required to read the code, agree to abide by its spirit and intent and adhere to this Code of Conduct as it relates to involvement in ESC.
2. Absolutely no solicitation of any professional member is permitted at any ESC function, nor may business cards, company literature or promotional items be presented to any person unless requested by that person. Other inappropriate conduct will not be allowed.
3. The ESC logo or name may not be used on business cards, company logos or signage without prior approval of the ESC.



4. Company logos or references shall not be illustrated on any presentation delivered on behalf of the Energy Services Coalition.
5. Membership does not include the use of ESC, directly, by reference or use of the logo for the direct promotion of products and services.
6. Highest value for all is achieved by your active participation in the committee, local chapter and national activities of the Energy Services Coalition.



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## **For Further Information**

ESC Website: [www.energyservicescoalition.org](http://www.energyservicescoalition.org)