



# 2017 Energy Efficiency Finance Forum

Chicago, Illinois • Fairmont Chicago • May 21 – 23, 2017

## PROGRAM *(tentative)*

### Sunday, May 21

12:00 - 7:00 pm                      **REGISTRATION OPEN**

1:00 - 5:00 pm                      **EEFF 101** *(Separate Registration Required)*

Sponsored by:

**CADMUS**

The workshop provides an introduction to the world of energy efficiency finance. You will have an opportunity to learn which models are working and how to finance efficiency projects.

5:30 - 7:30 pm                      **RECEPTION**

### Monday, May 22

7:00 am - 6:30 pm                      **REGISTRATION OPEN**

7:30 - 8:30 am                      **CONTINENTAL BREAKFAST**

8:30 - 10:30 am                      **WELCOME, KEYNOTE AND PLENARY**

Introductions:                      **Brian Stickles**, American Council for an Energy-Efficient Economy

Co-Chair Welcome:                      **Anmol Vanamali**, Vermont Energy Investment Corporation

#### **Keynote Address**

Speaker:                      **Jeffrey Eckel**, President, CEO, and Chairman of Hannon Armstrong

## Plenary Panel: The Future of Energy Efficiency Financing

Moderator: **Scott Bernstein**, Center for Neighborhood Technologies

Speakers: **Sandy Fazeli**, National Association of State Energy Officials  
**Karen Zelmar**, Pacific Gas and Electric Company  
**Daniel A. Seligman**, Ceres, Inc.

**10:30 - 11:00 am**                      **NETWORKING BREAK**

**11:00 am - 12:30 pm**                      **BREAKOUT SESSIONS**

### 1A: On-Bill in the Field

Moderator: **Wesley Holmes**, Southeast Energy Efficiency Alliance

Speakers: **Tammy Agard**, EEtility  
**Mary Templeton**, Michigan Saves  
**Anne Saliers**, Holland (MI) Board of Public Works  
**Matthew Brown**, Harcourt, Brown and Carey LLC

**Description:** Updates on Tariffed On-Bill in the American Southeast and how Holland Board of Public Works, with guidance from Michigan Saves and Harcourt, Brown & Carey, built a municipal on-bill program from the ground up.

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### 1B: Green Banks, Impact Investment, and Innovative Capitalization

Moderator: **Jeffrey Schub**, Coalition for Green Capital

Speakers: **Michelle Vigen**, Environmental Protection, Montgomery County Government, MD  
**Susan Leeds**, New York City Energy Efficiency Corporation (*invited*)  
**Doug Coward**, Solar and Energy Loan Fund (*invited*)

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### 1C: Commercial Market Insights for Energy Efficiency Financing

Moderator: **Megan Campbell**, Opinion Dynamics Corporation

Speakers: **Joe Indvik**, JDM Associates  
**Greg Leventis**, Lawrence Berkeley National Laboratory  
**Jérôme Bilodeau**, Dunsky Energy Consulting

**Description:** This session will explore how to leverage market insights to identify and capture opportunities in energy efficiency financing. What do we know about commercial customers today as it relates to energy efficiency investments and financing? This session will draw from research studies and practical experience serving business customers across the country.

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**1D: Illinois Clean Tech Incubator – (Midwest track)**

Moderator: **Ian Adams**, Clean Energy Trust

Speakers: **Greg Brinkerhoff**, Metrus Energy (*invited*)  
**Colin Bishop**, Renew Financial (*invited*)  
**Jigar Shaw**, Generate Capital (*invited*)  
**Matthew Worth**, Noesis (*invited*)  
**Kevin Johnson**, Clean Capital (*invited*)

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**12:30 - 1:30 pm NETWORKING LUNCH**

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**1:30 - 3:00 pm BREAKOUT SESSIONS**

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**2A: New Construction: Performance Contracting and Energy Efficiency Financing**

Moderator: **Brett Bridgeland**, SeventhWave

Speakers: **Iain Campbell**, Rocky Mountain Institute  
**Beau Engman**, PACE Equity  
**Jean Ascoli**, ComEd  
**Michael Tobin**, CBRE  
**Frank Greb**, SeventhWave (*invited*)

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**2B: The Role of CDFIs in Energy Efficiency Finance**

Moderator: **Amy Brusiloff**, Bank of America

Speakers: **Sadie McKeown**, Community Preservation Corporation  
**Esther Toporovsky**, Enterprise Community Partners  
**John Markowski**, Community Investment Corporation  
**Roger Clark**, Reinvestment Fund

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**2C: Leveraging Utility Rebate Programs to Reach Small and Medium Commercial Customers**

Moderator: **Matthew Brown**, Harcourt Brown & Carey LLC

Speakers: **Alex Hill**, Dunskey Energy Consulting  
**Julie Volpe-Walker**, American Electric Power  
**Stephen Moritz**, Encentiv Energy

**Description:** This panel will focus on a scalable, replicable, and effective way to ensure an integrated combination of financing with utility rebates and incentives. AEP Ohio has launched a new commercial finance offer, with support from HBC Energy Capital and Encentive Energy that combines a third party (non-utility) finance offer with the utility incentive/rebate application, making the

application and approval process stress-free and easy for contractors. It makes it easy for utilities to have good visibility into what projects are being financed and how the financing combines with their rebate/incentive programs. In addition, Rhode Island has begun new efforts on financing for the commercial sector, Dunsky Energy Consulting's, Alex Hill, will describe.

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**2D: Overcoming Barriers to Energy Efficiency Finance in Rural America** (Midwest track)

Moderator: **Nikhil Vijaykar**, Midwest Energy Efficiency Alliance

Speakers: **Miguel Yanez**, Environmental and Energy Study Institute  
**Luis Bernal**, United States Department of Agriculture, Rural Energy Savings Program (*invited*)  
**Holmes Hummel**, PAYS (Pay As You Save System)  
**Michael Volker**, Midwest Energy Efficiency Alliance (*invited*)

**3:00 - 3:30 pm** NETWORKING BREAK

**3:30 - 5:00 pm** PLENARY PANEL

**Plenary: Financing Efficiency to Reduce Infrastructure Investment Costs – The Trump Private Sector Financing Plan**

Moderator: **Chris Kramer**, Energy Futures Group

**5:30 - 7:30 pm** RECEPTION

**Tuesday, May 23**

**7:00 am - 4:00 pm** REGISTRATION OPEN

**7:30 - 8:30 am** CONTINENTAL BREAKFAST

**8:30 - 10:30 am** KEYNOTE AND PLENARY

Co-Chair Welcome: **Joel Freehling**, Chicago Bridge & Iron

**Plenary Session: Philanthropic Lending**

Moderator: **Kim Dempsey**, The Kresge Foundation

Speakers: **Peter Adamczyk**, Vermont Energy Investment Corporation  
**Allison Clark**, The MacArthur Foundation  
**Alison Corwin**, The Surdna Foundation  
**Benjamin Healey**, The Connecticut Green Bank

**10:30 - 11:00 am**                      **NETWORKING BREAK**

**11:00 am - 12:30 pm**                      **BREAKOUT SESSIONS**

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**3A: Financing Energy Resilience**

Moderator: **Aaron Koch**, City of Chicago

Speakers:    **Joel Freehling**, Chicago Bridge & Iron  
                  **Mark Goodson**, Chicago Bridge & Iron *(invited)*  
                  **Andrew Salkin**, 100 Resilient Cities Program *(invited)*  
                  **Paul Herman**, HIP Investor *(invited)*

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**3B: Advancing PACE Financing with Regional & Statewide Administrators**

Moderator: **Chris Jones**, Cincinnati Greater Energy Alliance

Speaker:     **George Caraghiaur**, PACENation

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**3C: The Role of Utilities, ESCOs and Financers in the Transportation Revolution**

Moderator: **Bethany Whitaker**, Vermont Energy Investment Corporation

Speaker:     **Jeff Monder**, Green Mountain Power

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**3D: From Model to Mainstream: The Evolution of Multifamily Retrofit Financing in Chicago**

Moderator: **Noelle Gilbreath**, Community Investment Corporation

Speakers:    **Anne Evens**, Elevate Energy  
                  **Jack Markowski**, Community Investment Corporation

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**12:30 - 1:30 pm**                      **LUNCH**

**Keynote Address**

**1:30 - 3:00 pm**

**CONCURRENT SESSIONS**

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**Concurrent I: Role of Financing in State Efficiency Target Setting and Potential Studies**

Moderator: **Alex Hill**, Dunsky Energy Consulting

Speakers: **Chris Kramer**, Energy Futures Group (*invited*)  
**Angie Lee**, Navigant (*invited*)  
**Greg Hale**, New York Governor's office (*invited*)

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**Concurrent II: Efficiency Financing for Low and Moderate-Income (LMI) Households: Current State of the Market, Issues, and Opportunities**

Moderator: **Johanna Zetterburg**, United States Department of Energy

Speakers: **Greg Leventis**, Lawrence Berkeley National Laboratory  
**Bruce Schlein**, Citi

**3:00 - 3:30 pm**

**NETWORKING BREAK**

**3:30 - 5:00 pm**

**CONCURRENT SESSIONS**

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**Concurrent III: Promising Pilots and Innovations: Exploring the MEETs Model and Community Choice Aggregation**

Moderator: **TBD**

Speakers: **Rob Harmon**, MEETS™ (The Metered Energy Efficiency Transaction Structure)  
**Gary Gero**, County of Los Angeles, California (*invited*)

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**Concurrent IV: Project Finance in Energy Efficiency Pay for Performance and Procurement**

Moderator: **Doug Lewin**, CLEAResult

Speakers: **Dan Kartzman**, New York State Energy Research & Development Authority (*invited*)  
**Matt Golden**, Open EE Meter (*invited*)

**5:00 pm**

**FORUM ADJOURNS**

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