

# 2018 Energy Efficiency Finance Forum

Tarrytown, New York • Doubletree by Hilton Hotel • May 21 – 22, 2018

## PRELIMINARY PROGRAM

### Monday, May 21

7:30 am – 5:00 pm

REGISTRATION OPEN

8:30 am – 12:00 noon

**EEFF 101 Workshop** *(Separate registration required)*

**Sponsored by: Cadmus**

The workshop provides an introduction to the world of energy efficiency finance. Instructors will help participants understand the key components that make up an energy efficiency financing program, review many of the most popular financing models, discuss the state of the market, and provide insight on what drives program performance, including best practices for program design.

**PACE Workshop** *(Separate registration required)*

**Sponsored by: PACENation**

An intensive workshop on the fundamentals of PACE. Learn how PACE works in a real time application, where it is available, who can use it, and what it can be used for. The Workshop will cover legislation & local ordinances, program design and administration, financing options and capital providers, and a broad review of commercial & residential basics.

**On-Bill Workshop** *(Separate registration required)*

**Sponsored by: Harcourt Brown & Carey**

This workshop provides an introduction to the concept and practice of On-Bill Finance and Repayment. If you think all on-bill means the same thing, then think again. There are many varieties of on-bill and we will walk you through the different varieties available to you. It will help you to answer if On-Bill, in any variety, is a useful path for you to pursue. We will pull from real-life examples throughout the discussion.

12:00 – 1:00 pm

**NETWORKING LUNCH FOR  
MORNING WORKSHOP PARTICIPANTS**

**1:00 – 3:30 pm WELCOME, KEYNOTE AND PLENARY SESSION**

Introductions: **Steven Nadel**, American Council for an Energy-Efficient Economy

Co-chair welcome: **Alfred Griffin**, President, New York Green Bank

**Keynote Address**

Speaker: **Richard Kauffman**, Chairman for Energy and Finance for New York, Office of Governor, Andrew Cuomo

**Plenary Panel: Derisking Decarbonization: Making Green Energy Investments Blue Chip**

Panelists: **Dan Reicher**, Executive Director of the Steyer-Taylor Center for Energy Policy and Finance, Stanford University  
**Pier LaFarge**, Co-Founder and CEO, SparkFund  
**Jonathan Maxwell**, Co-Founder and CEO, Sustainable Development Capital LLP

**3:30 – 4:00 pm NETWORKING BREAK**

**4:00 – 5:30 pm BREAKOUT SESSIONS**

**1A: RetrofitNY: Financing Models for Net Zero Energy Retrofits of Multifamily Affordable Housing**

Moderator: **Greg Hale**, New York State Energy Research & Development, NYSERDA

Summary of RetrofitNY, a New Initiative Aimed at Catalyzing a Net Zero Energy Retrofit Market, at Scale

Presenter: **Greg Hale**, New York State Energy Research & Development, NYSERDA

Achieving scale for this market will require, among other things, the ability to underwrite all (or at least a major portion) of the projected operational savings from these renovations. Several leading multifamily lenders will discuss various financial mechanisms that could help achieve these aggressive underwriting standards.

Presenters: **Sadie McKeown**, Community Preservation Corporation  
**Susan Leeds**, New York City Energy Efficiency Corporation, NYCEEC  
**Chrissa Pagitsas**, Federal National Mortgage Association, Fannie Mae

**1B: On-Bill Market Update**

Moderator: **Philip Henderson**, Natural Resources Defense Council

On-Bill Financing: Expanding the Reach of Energy Efficiency Programs

Presenter: **Vincent Wynne**, Pepco Holdings

NegaWatts-as-a-Service: Nationwide On-Bill Financing for Residential Efficiency

Presenter: **Katie Theiss**, Arcadia Power

On-Bill Financing: Assessing Its Feasibility for Your Utility

Presenter: **Mathieu Poirier**, Dunsky Energy Consulting

## 1C: Energy Efficiency Financing in Commercial Buildings

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

Integrating Building Energy Efficiency into Commercial Real Estate Transactions

Presenters: **Paul Mathew**, Lawrence Berkeley National Laboratory  
**Nancy Wallace**, University of California, Berkeley Business School

Navigating Recent Trends in Commercial Energy Efficiency Financing

Presenter: **Joe Indvik**, JDM Associates

What Does It Take to Make a Commercial Financing Program Work?

Presenter: **Mary Templeton**, Michigan Saves

**6:00 – 7:30 pm** **NETWORKING RECEPTION**

**Tuesday, May 22**

**7:00 am – 4:30 pm** **REGISTRATION OPEN**

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

**8:30 – 10:30 am** **WELCOME, KEYNOTE AND PLENARY SESSION**

Introductions: **Steven Nadel**, American Council for an Energy-Efficient Economy

Co-chair welcome: **Anmol Vanamali**, Vermont Energy Investment Corporation

### Keynote Address

Speaker: **Erin Robert**, Executive Director, Sustainable Finance, JPMorgan Chase & Company

### Plenary Panel: Property Assessed Clean Energy (PACE) and Consumer Protection

Panelists: **Cisco DeVries**, Chief Executive Officer, Renew Financial  
**Jon Rao**, Attorney, National Consumer Law Center

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

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

## 2A: Serving Rural Communities

Finance Strategies for Energy Efficiency Programs in Rural and Small Town America

Presenter: **Mary Shoemaker**, American Council for an Energy-Efficient Economy

Manufactured Housing: A Nexus of Clean Energy and Affordable Housing Finance

Presenters: **Mark Wyman**, Energy Trust of Oregon  
**Desiree Sideroff**, Craft3

## 2B: Green Bank Evolution

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

From Failed to Troubled and Beyond

Presenter: **Gwen Yamamoto Lau**, Hawaii Green Infrastructure Authority

Green Banks: Working At All Levels

Presenter: **Tom Deyo**, Montgomery County Green Bank

Colorado's Portfolio Approach to Clean Energy Financing

Presenter: **Paul Scharfenberger**, Colorado Energy Office

## 2C: Multifamily Lending – Panel Discussion

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

Presenters: **Sadie McKeown**, Community Preservation Corporation

**Katie Elmore**, Community Investment Corporation

**Esther Toporovsky**, Enterprise Community Partners

**Chrissa Pagitsas**, Federal National Mortgage Association, Fannie Mae

**12:30 – 1:30 pm**

**NETWORKING LUNCH**

**1:30 – 3:00 pm**

**BREAKOUT SESSIONS**

## 3A: What a Mature Market Looks Like

Moderator: **Andrew Nih**, Southern California Gas Company

Exploring Financing Influence and Cost-Effectiveness Relative to Rebates

Presenters: **Megan Campbell**, Opinion Dynamics

**Leslie Malone**, Dunsky

TBD

Presenter: **Kerry O'Neill**, Connecticut Green Bank

Trends in Single Family Energy Efficiency Loan Programs

Presenter: **Miriam Joffe-Block**, California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)

## 3B: PACE Market Update

Moderator: **Greg Saunders**, CleanFund Commercial PACE Capital, Inc.

A New ERA of PACE Financing

Presenter: **Colin Bishopp**, Renew Financial

Lessons in Commercial PACE Leadership: The Path from Legislation to Launch

Presenter: **Sean Williamson**, US Department of Energy

R-PACE and Consumers: Mortgage Payment Impacts and Consumer Protection Developments

Presenter: **Jeff Deason**, Lawrence Berkeley National Laboratory

The Progression of PACE in New York

Presenter: **Susan Morth**, Energize NY

### 3C: Innovative Multifamily Financing

Moderator: **Trenton Allen**, Sustainable Capital Advisors

Leaving Nothing on the Table: Lessons from Integrating Energy Efficiency and Solar Resources in Affordable Multifamily Buildings

Presenter: **Dan W. York**, American Council for an Energy-Efficient Economy

Is the Unicom Real? ESCO Services for Affordable Housing

Presenters: **Jeffrey Greenberger**, Affordable Community Energy Services Company  
**Adler Priory**, Reinvestment Fund

Discussion of Case Studies from a Full-service ESCO that uses Blended Finance Approach to Meet the Needs of Building Owners with a Public Purpose

Presenter: **Brian Pine**, Commons Energy

### 3:00 – 3:30 pm NETWORKING BREAK

### 3:30 – 5:00 pm BREAKOUT SESSIONS

#### 4A: Efficiency as a Service

Moderator: **Miriam Wrobel**, Miriam Wrobel Consulting

Energy Efficiency as a Service

Presenters: **Bob Hinkle**, Metrus Energy  
**Bruce Schlein**, Citi

Residential Energy Savings Agreements (ESAs) in Practice

Presenter: **Andy Frank**, Sealed

#### 4B: Small Business Financing

Moderator: **Robert Lurie**, New York Power Authority

Challenges to Financing Energy Efficiency Projects among Small Businesses

Presenter: **Lloyd Kass**, Lime Energy

Small Business Market Insights on Financing Energy Efficiency

Presenters: **Jake Millette**, Opinion Dynamics  
**Alex Hill**, Dunsky

#### 4C: Driving Investment in Energy Efficiency through Standardization

Moderator: **David Tine**, HSB/MunichRe

Presenters: **Megan Fisher**, New York State Energy Research & Development (NYSERDA)  
**Patrick McNamara**, SEALED  
**Matt Golden**, Open Energy Efficiency (OpenEE)  
**Panama Batholomy**, Investor Confidence Project

ACEEE would like to recognize the generous support of the following Sponsors and Ally program contributors to the 2018 Energy Efficiency Finance Forum.

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