

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 *(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 101 *(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 101 *(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

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

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

Presenter: **Greg Hale**, Energy Efficiency Markets and Financing, 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, NYCEEC

Chrissa Pagitsas, FNMA

Other Issues that Impact Buy-In from LIHTC Tax Equity Providers

1B: On-Bill Market Update

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

Presenter: **Vincent Wynne**, Pepco Holdings, Inc.

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

Presenter: **Toyah Barigye**, Arcadia Power

On-Bill Financing: Assessing Its Feasibility for Your Utility

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

1C: Energy Efficiency Financing in Commercial Buildings

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: **Cicso 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: **Jill Ferguson**, 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

Lending for Energy Efficiency Improvements to Multifamily Properties

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

Integrating Efficiency into the Lending Process for Multifamily Housing

Presenter: **Bettina Bergoo**, Natural Resources Defense Council

12:30 – 1:30 pm

NETWORKING LUNCH

1:30 – 3:00 pm

BREAKOUT SESSIONS

3A: What a Mature Market Looks Like

Exploring Financing Influence and Cost-Effectiveness Relative to Rebates

Presenter: **Megan Campbell**, Opinion Dynamics

Trends in Single Family Energy Efficiency Loan Programs

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

3B: PACE Market Update

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

3C: Innovative Multifamily Financing

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

Presenter: **Stefen Samarripas**, American Council for an Energy-Efficient Economy

Is the Unicom Real? ESCO Services for Affordable Housing

Presenter: **Jeffrey Greenberger**, Affordable Community Energy Services Company

3:00 – 3:30 pm

NETWORKING BREAK

4A: Efficiency as a Service

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

Challenges to Financing Energy Efficiency Projects among Small Businesses

Presenter: **Lloyd Kass**, Lime Energy

Small Business Market Insights on Financing Energy Efficiency

Presenter: **Megan Campbell**, Opinion Dynamics

4C: Driving Investment in Energy Efficiency through Standardization

Driving Investment in Energy Efficiency through Standardization

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

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