# PRELIMINARY PROGRAM

## Monday, May 21

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 am – 5:00 pm</td>
<td>REGISTRATION OPEN</td>
</tr>
<tr>
<td>8:30 am – 12:00 noon</td>
<td><strong>EEFF 101 Workshop</strong> <em>(Separate registration required)</em></td>
</tr>
<tr>
<td><strong>Sponsored by: Cadmus</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><strong>PACE Workshop</strong> <em>(Separate registration required)</em></td>
</tr>
<tr>
<td><strong>Sponsored by: PACENation</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>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 &amp; local ordinances, program design and administration, financing options and capital providers, and a broad review of commercial &amp; residential basics.</td>
</tr>
<tr>
<td></td>
<td><strong>On-Bill Workshop</strong> <em>(Separate registration required)</em></td>
</tr>
<tr>
<td><strong>Sponsored by: Harcourt Brown &amp; Carey</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>12:00 – 1:00 pm</td>
<td>NETWORKING LUNCH FOR MORNING WORKSHOP PARTICIPANTS</td>
</tr>
</tbody>
</table>
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.

HOST

GOLD

SILVER

BRONZE