# PROGRAM

**Monday, May 21**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 am–5:00 pm</td>
<td>REGISTRATION OPEN</td>
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<tr>
<td>8:30 am–noon</td>
<td><strong>Energy Efficiency Finance 101 Workshop</strong> <em>(Separate registration required.)</em></td>
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**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.

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<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>12:00 – 1:00 pm</td>
<td>NETWORKING LUNCH FOR MORNING WORKSHOP PARTICIPANTS</td>
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<tr>
<td>1:00–3:30 pm</td>
<td><strong>WELCOME, KEYNOTE AND PLENARY SESSION</strong></td>
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</tbody>
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**Introductions:**  Steven Nadel, American Council for an Energy-Efficient Economy

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

**Keynote Address:**  Richard Kauffman, Chairman of Energy and Finance for New York, Office of Governor, Andrew M. Cuomo

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

**Moderator:**  Dan Reicher, Executive Director of the Steyer-Taylor Center for Energy Policy and Finance, Stanford University

**Panelists:**  Pier LaFarge, Co-Founder and CEO, SparkFund

Jonathan Maxwell, Co-Founder and CEO, Sustainable Development Capital LLP
1A: RetrofitNY: Financing Models for Net Zero Energy Retrofits of Multifamily Affordable Housing

This panel will include a summary of RetrofitNY, a new initiative aimed at catalyzing a net zero energy retrofit market at scale. 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.

Moderator: Greg Hale, New York State Energy Research and Development Authority, NYSERDA

Presenters: Sadie McKeown, Community Preservation Corporation
Susan Leeds, New York City Energy Efficiency Corporation
Chrissa Pagitsas, 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
Presenter: Paul Mathew, Lawrence Berkeley National Laboratory

Navigating Recent Trends in Commercial Energy Efficiency Financing
Presenter: Joe Indvik, RE Tech Advisors

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

7:30 am–4:30 pm  REGISTRATION OPEN

7:30–8:30 am  CONTINENTAL BREAKFAST

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

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

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

**Keynote Address**  
Erin Robert, Executive Director, Sustainable Finance, JPMorgan Chase & Company

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

Moderator:  Candace Vahlsing, Senior Advisor for Energy, Climate, and Environment for U.S. Senator Michael Bennet, State of Colorado

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**

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

Advancing a Clean Energy Economy in Central Appalachia
Presenter:  Hannah Vargason, Natural Capital Investment Fund

On-Bill in Rural Communities
Presenter:  John-Michael Cross, Environmental and Energy Study Institute

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
Panelists: Sadie McKeown, Community Preservation Corporation
          Katie Elmore, Community Investment Corporation
          Esther Toporovsky, Enterprise Community Partners
          Chrissa Pagitsas, Fannie Mae

12:30–1:30 pm NETWORKING LUNCH

1:30–3:00 pm BREAKOUT SESSIONS

3A: Evolution of Residential Loan Programs and Their Effectiveness
Moderator: Andrew Nih, Southern California Gas Company
Exploring Financing Influence and Cost-Effectiveness Relative to Rebates
Presenters: Alan Elliott, Opinion Dynamics
           Alex Hill, Dunsky Energy Consulting
Building Markets by Reducing Risk, Fostering Collaboration, and Listening to the Customer
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 Unicorn Real? ESCO Services for Affordable Housing
   Presenters: Jeffrey Greenberger, Affordable Community Energy Services Company
               Adler Prioly, Reinvestment Fund
   Discussion of Case Studies from a Full-Service ESCO that Uses a 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
               Paul Bienstock, 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: Bruce Torkelson, Lime Energy
   Small Business Market Insights on Financing Energy Efficiency
   Presenters: Jake Millette, Opinion Dynamics
               Leslie Malone, Dunsky Energy Consulting

4C: Data Standardization: How to Inspire Confidence with Machine Learning, Finance, Insurance, and Real Time Metering
   Moderator: David Tine, HSB/MunichRe
   Presenters: Megan Fisher, NYSERDA
               Lauren Salz, Sealed
               Panama Batholomy, Investor Confidence Project
               Michael Burke, CLEAResult
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