NAESCO TECHNOLOGY AND FINANCING WORKSHOP

Capturing Innovation without Sacrificing Performance: How Technological and Financing Choices Shape Project Development and Implementation Today

June 1-2, 2016

Agenda

June 1

5:30 pm – 6:30 pm
Welcome Reception
Sponsored by ACUITY BRANDS

June 2

7:45 am – 8:15 am
Registration and Continental Breakfast
Sponsored by HARSHAW TRANE

8:15 am – 8:30 am
Welcome and Opening Remarks

Natasha Shah, Vice President, NORESCO and Chair, NAESCO

PLENARY SESSION: EXPANDING THE VALUE OF ENERGY EFFICIENCY

8:30 am – 9:30 am
A Regional Report on State Energy Efficiency Initiatives: The Pressures, the Pushback, and Which States are Taking a Leadership Role

Stacey Paradis, Executive Director, Midwest Energy Efficiency Alliance
Lona Brewer, Environmental Scientist, Kentucky Department for Energy Development & Independence
Kristofer Anderson, Program Manager, Energy Resources Division, Georgia Environmental Finance Authority

Moderator: Donald Gilligan, President, NAESCO

9:30 am – 9:45 am
Break

TRACK ONE: TECHNOLOGY AS A DIFFERENTIATOR

9:45 am – 10:45 am
What Does the Internet of Things Mean for Energy Efficiency?
- Capturing whole building and system-wide savings: How close is that goal to commercial reality?
- Identifying the available opportunity and risks for ESCOs
- Unlocking the value going forward
- Impact on Smart Grid and Demand Response Programs
Rick Rodriguez, Senior Director, Energy Solutions, Siemens Industry, Inc.
Kurt Barrett, Intelligent Services Team Leader, Harshaw Trane
Jay Weiland, Director of Unified Building Solutions, Acuity Brands

Moderator: David Weiss, Partner, Bywater Partners, LLC

10:45 am – 11:30 am
Making Sense of the Web of Building Energy Codes
- Navigating conflicting energy code requirements
- How codes both drive and impede technology development
- Updating the Unified Facilities Criteria (UFC) 3-530-1 and JGSA’s P100 Facilities Guidance may change ESPC economics

Dana Kose, Program Manager, The Weidt Group
John Davenport, Chief Scientist, Energy Focus Group

Moderator: Scott Ririe, Managing Partner, CTS Group

11:30 am – 12:15 pm
Enhancing Efficiency through Lighting Controls
- Controlling LEDs
- Wire vs. Wireless
- Applications for Different Building Codes

Michael Matour, National Energy Manager, Lutron
Jon Zelinsky, Director, Contracting Market, Philips

Moderator: Bruce Ryman, Vertical Markets Manager, ESCO/Education, Osram Sylvania

12:15 pm – 1:15 pm
Networking Lunch
Sponsored by ENERGY FOCUS, INC.

1:15 pm – 2:30 pm
Non-Energy Benefits of LEDs: Enhancing Wellness and Productivity
- LEDs and the economics of people
- Health benefits of LEDs

Jack Curran, President, LED Transformations, LLC
Janna Mino, Research Analyst, Energy Focus, Inc.

Moderator: David Pierce, Director of Sales & Engineering, Retro-Tech Systems
2:30 pm – 3:00 pm  
**The Economics of LEDs**  
- Do first cost issues pose a problem in switching to LED?  
- Calculating LED costs into project economics  
- Assessing the impact of public sector market payback limitations on LED usage  

Howard Wolfman, Principal, Lumispec Consulting  
Moderator: Jian Ni, Chief Operating Officer, Forest Lighting

3:00 pm – 3:45 pm  
**The Customer Experience with Innovative Technologies**  

City of Louisville  
Maria Koetter, Director of Sustainability, Louisville Metro Government  
Chris Downs, Account Executive, Johnson Controls  
Representative from the City of Louisville  

University of Kentucky  
Shane Tedder, Sustainability Coordinator, University of Kentucky  
Britney Thompson, Energy Engineer, University of Kentucky  
Jeffrey Metcalf, Vice President, Ameresco  

University of Louisville  
Larry Owsley, Vice President of Business Affairs (retired), University of Louisville  
Glen Todd, Assistant Director, Health Science Campus Physical Plant Services, University of Louisville  
George Kirwan, Assistant Director, Department of Physical Plant, Engineering Services, University of Louisville  
Michael Azzara, Account Executive, Siemens  

Moderator: Natasha Shah, Vice President, NORESCO and Chair, NAESCO

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**TRACK TWO:**  
**USING FINANCING TO MAGNIFY ENERGY PROJECT SIZE AND REACH**  

9:45 am – 10:45 am  
**The Financing Community Takes Another Look at Measurement and Verification Requirements: Will Stipulated Savings Survive?**  
- Harnessing technology to improve M&V  
- What level of M&V do loan committees want to see?  

Mark White, Managing Director, Bostonia Partners  
David Jump, Project Manager, kW Engineering  

Moderator: Wayne Chase, M&V Engineer, OpTerra Energy Services
10:45 am – 11:45 am  Using Off Balance Sheet Approaches to Finance ESPC Projects
• Managed ESAs for the commercial and industrial market
• Another look at off balance sheet financing for public sector customers

Doug Golden, Director of Business Development, Metrus Energy
Bob Johnson, Senior Vice President, Hannon Armstrong

Moderator:  Darcy Immerman, Senior Vice President, Resiliency, AECOM

11:45 am – 12:15 pm  Crafting Legal Provisions Consistent with Financing Requirements

Steve Sorett, Attorney, Kutak Rock LLC

Moderator:  Terry E. Singer, Executive Director, NAESCO

12:15 pm – 1:15 pm  Networking Lunch
Sponsored by ENERGY FOCUS, INC.

1:15 pm – 2:15 pm  Scaling Up the Model to Implement ECMs on a Greater Level
• What Lessons have been learned about scaling up?
• Financing ESPC projects using QECBs through the SAVES Green Community Programs

W. Greg Montgomery, Managing Director, Clean Source Capital
Ryan Freed, Manager of Operations, City Energy Project

Moderator:  Christine Keck, Director, Government Relations, Energy Systems Group

2:15pm – 3:30pm  Can PACE Programs be Transformative in the Commercial Market: The Experience Thus Far

George Caraghiaur, Principal, Energy & Sustainability Services
Charles McGinnis, Senior Director-State Government-Higher Education, Johnson Controls Inc.

Moderator:  Donald Gilligan, President, NAESCO

3:30 pm  Adjourn