

**AGENDA**  
**Energy Performance Contracting Workshop**  
**For Public Housing Authorities**  
 June 22-26, 2009      Chicago, Illinois

Instructors:      David Anderson, David Birr

Under the Department of Housing and Urban Development's (HUD's) Performance Funding System (24 CFR 990), public housing authorities can reduce utility costs through implementation of energy conservation measures and use these savings to pay for the capital improvements and for other needs within their authority. In this workshop, participants will learn:

- How to follow HUD Performance Funding System regulations to fund energy conservation capital projects with private financing
- How other public housing authorities have successfully implemented performance contracts in public housing with energy service companies (ESCOs)
- How to implement the key elements of the performance contracting process through active learning exercises
- How to develop better working relationships with HUD staff and technical assistance providers

**MONDAY — June 22, 2009 -**

8:00 - 9:00	Welcome and Introductions	Eugene Goldfarb
9:00 - 9:30	Introduction to Performance Contracting	Dave Birr
9:30 - 9:45	BREAK	
9:45- 11:15	HUD's Energy Incentives	
11:15-12:00	Case Study #1 on Incentives	ESCO TBD
12:00 - 1:30	LUNCH	
1:30 - 2:00	Utility Analysis in PC	
2:00 - 2:45	Energy & Water Savings Opportunities	Dave Anderson
2:45 – 3:00	BREAK	
3:00 – 3:45	Utility Analysis and Site Selection	Dave Birr
3:45 – 5:00	Exercise 1: Site Selection	

**TUESDAY — June 23, 2009**

8:00 - 8:30	Review	Dave Anderson
8:30 - 9:15	Group Presentation 1: Sites Selected and Why	
9:15 - 10:15	Developing and Issuing the RFP	Dave Birr
10:15 -10:30	BREAK	
10:30 -11:30	Exercise 2: Developing the RFP and Performance Contracting Team	
11:30– 1:00	LUNCH	
1:00 - 2:30	Selecting the ESCO, Part 1: Evaluating RFP Responses	Dave Birr
2:30 - 2:45	BREAK	
2:45 - 3:15	Group Presentation 3: ESCOs Short Listed and Why	
3:15 - 4:45	Ex 4: Selecting the ESCO, Part 2: Interviewing the ESCOs	

**WEDNESDAY — June 24, 2009 -**

8:00 - 8:30	Review	Dave Birr
8:30 - 9:00	How EPC can Address Operations	
9:00-9:30	Role of Resident Education in EPC	Dave Birr
9:30-9:40	Energy Star Program	Debbie Wills, HUD
9:40 –10:00	USEPA Energy Programs	TBD
10:00-10:15	BREAK	
10:15-10:30	Healthy Homes Improvement Opportunities	Dave Birr
10:30-11:00	Case Study #3:	ESCo TBD
11:00-11:45	Regulatory Update:	TBD
11:45 - 1:00	LUNCH	
1:00 – 1:45	Opportunities for Significant Energy Savings when Performing Substantial Rehab	TBD
1:45 - 4:45	Field Trip	CHA
5:15 - 7:15	Social Mixer at Cavanaugh's	

**THURSDAY — June 25, 2009**

8:30 - 8:30	Review	
8:30 - 9:15	Reviewing the Audit Results	Dave Birr
9:15-10:00	Exercise 5: Looking at Your Audit	
10:00-10:15	BREAK	
10:15–10:45	Measures Selected and Why	
10:45-11:15	Case Study #4	ESCo TBD
11:15-12:45	LUNCH	
12:45–1:15	Negotiating an Audit Agreement	Dave Birr
1:15-2:00	Negotiating an Energy and Water Services Agreement	
2:00-2:15	BREAK	
2:15 – 3:00	Project Financing	Dave Birr
3:00-3:45	Case Study # 5: Project Financing	ESCo or lender TBD
3:45-5:00	Exercise 6: Negotiating the Contract	

**FRIDAY — June 26, 2009**

8:00 - 8:30	Review	Dave Anderson
8:30 - 9:00	Contract Negotiations	Dave Anderson
9:00 - 9:45	Implementing the Project	
9:45- 10:20	Case Study #5	ESCo TBD
10:20-10:35	Break	
10:35 -11:00	Aggregation for Procurement	Dave Anderson
11:00-11:45	Measurement, Verification, and Commissioning	Dave Birr
11:45-12:00	Feedback and Distribution of Course Certificates	