

AGENDA

Energy Performance Contracting Workshop For Public Housing Authorities

June 4-8, 2007
Chicago, Illinois

Instructors: David Anderson, David Birr, James Cavallo

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 4, 2007

8:00 - 9:00	Welcome and Introductions	
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	
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 5, 2007

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 -11:15	Exercise 2: Developing the RFP and Performance Contracting Team	
11:15 - 12:00	Case Study #2: Owner's Rep	
12:00 – 1:30	LUNCH	
1:30 - 2:00	Selecting the ESCO, Part 1: Evaluating RFP Responses	Dave Birr
2:00 - 2:45	Exercise 3: Evaluating the RFP Responses	
2:45-3:00	BREAK	
3:15 - 3:30	Group Presentation 3: ESCOs Short Listed and Why	
3:30 - 5:00	Ex 4: Selecting the ESCO, Part 2: Interviewing the ESCOs	

WEDNESDAY — June 6, 2007

8:00 - 8:30	Review	Dave Anderson
8:30 - 9:00	How EPC can Address Operations	
9:00-9:40	Role of Resident Education in EPC	Dave Anderson
9:40-9:55	BREAK	
9:55-10:05	Energy Star Program	Debbie Wills, HUD
10:05-10:30	Healthy Homes Improvement Opportunities	Dave Anderson
10:30-11:15	Case Study #3:	
11:15-12:00	Case Study #4: Chicago Housing Authority	
12:00 - 1:30	LUNCH	
1:30 - 4:45	Field Trip	
4:45 - 5:00	Return to Classroom	
5:30 - 7:30	Social Mixer	

THURSDAY — June 7, 2007

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	Measurement, Verification, and Commissioning	Dave Birr
11:15-12:00	Case Study # 5: Siemens on M&V	
12:00-1:30	LUNCH	
1:30 - 2:00	Negotiating an Audit Agreement	Dave Birr
2:00-2:45	Negotiating an Energy and Water Services Agreement	
2:45-3:00	BREAK	
3:00-3:45	Project Financing	Dave Birr
3:45-5:00	Exercise 6: Negotiating the Contract	

FRIDAY — June 8, 2007

8:00 - 8:30	Review	Dave Anderson
8:30-9:00	Contract Negotiations	Dave Anderson
9:00-9:45	Implementing the Project	
10:00 -10:30	Aggregation for Procurement	Dave Anderson
10:30-11:15	Case Study #6	ESG
11:15-12:00	Feedback and Distribution of Course Certificates	