



Home Energy Score

Conference Agenda: Schedule Overview

Monday, July 9, 2012 – Overview

Pre-Conference Sessions

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|--|--|--|---|--|--|--|
| Noon – 6:00 PM | Registration & Showcase Setup (<i>Foyer</i>) | | | | | |
| 1:00 – 2:00 PM <i>Choose one</i> | Better Buildings Neighborhood Program <i>Room: Salon K Room: Salon J Room: Salon A</i> | | | Home Performance with ENERGY STAR <i>Room: Salon B</i> | Home Energy Score <i>Room: Salon C</i> | Office Hours <i>Room: Salon H</i> |
| | NGO Administrators Peer Exchange | Financing Peer Exchange | Data & Evaluation Peer Exchange | Office Hours (<i>sign up at registration desk</i>) | Partner Opportunities and Program Update | Office Hours: (<i>sign up at registration desk</i>) <ul style="list-style-type: none"> National Renewable Energy Laboratory / Building America Lawrence Berkeley National Laboratory Better Buildings Neighborhood Program HUD PowerSaver |
| 2:15 – 3:15 PM <i>Choose one</i> | Business Planning with Pro Forma | Workforce Peer Exchange | Multifamily / Low Income Peer Exchange | Stakeholder Meeting | Office Hours (<i>sign up at registration desk</i>) | <ul style="list-style-type: none"> Lawrence Berkeley National Laboratory Better Buildings Neighborhood Program HUD PowerSaver |
| 3:30 – 4:30 PM <i>Choose one</i> | Tools (<i>bring a laptop</i>) | Marketing & Driving Demand Peer Exchange | 3:15 PM Decision Tool Planning Meeting <i>Room: Lee (by invitation)</i> | | | |
| 4:45 – 5:45 PM <i>Choose one</i> | DOE Evergreen Funds Update <i>Room: Salon J (for DOE grant recipients)</i> | | | Becoming a Sponsor | Existing Partners Meeting | |
| 6:00 PM (Start) | Networking Opportunity (<i>Atrium Lobby</i>) <i>Dinner on your own</i> | | | | | |

Tuesday, July 10, 2012 – Overview

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| 7:00 – 8:30 AM | Showcase Setup (<i>Foyer</i>) | | | | | |
| 7:30 – 8:30 AM | Registration & Breakfast (<i>Foyer & Salon 3</i>) | | | | | |
| 8:30 – 10:00 AM | Opening Plenary & Keynote Address (<i>Salon 3</i>) <ul style="list-style-type: none"> • Conference Overview & Agenda: Danielle Sass Byrnett, Better Buildings Neighborhood Program, U.S. DOE • Welcome & DOE Update: Dr. Kathleen Hogan, Deputy Assistant Secretary for Energy Efficiency, U.S. DOE • Framing the Challenge & Opportunity: Richard Kauffman, Senior Advisor to the Secretary, U.S. DOE | | | | | |
| 10:00 – 10:30 AM | Break | | | | | |
| | Topical Tracks | | | | | |
| | <i>Driving Demand (D)</i> | <i>Financing (F)</i> | <i>Engaging Business Partners (P)</i> | <i>Sustainable Business Models (M)</i> | <i>Strategies for Success (S)</i> | |
| 10:30 – Noon Session 1 <i>Choose one</i> | Successful Marketing Strategies <i>(Lessons Learned)</i> <i>Room: Salon B</i> D1 | The Role of Financing in Program Implementation <i>(Point-Counterpoint)</i> <i>Room: Salon A</i> F1 | Connecting the Dots Among Real Estate Stakeholders <i>(Lightning Round)</i> <i>Room: Salon J</i> P1 | Shared Value in Utility & Efficiency Partnerships <i>(Panel)</i> <i>Room: Rosslyn</i> M1 | Reaching Moderate Income Homeowners <i>(Panel)</i> <i>Room: Salon K</i> S1 | |
| Noon – 1:30 PM | Lunch & Keynote Address: Nancy Welsh, Builders of Hope (<i>Salon 3</i>) | | | | | |
| 1:30-3:00 PM Session 2 <i>Choose one</i> | Designing Custom Messages for Specific Markets <i>(Small Group)</i> <i>Room: Salon B</i> D2 | Effective Incentive Structures <i>(Lessons Learned)</i> <i>Room: Salon A</i> F2 | Five Steps to a Profitable Contractor Base <i>(Panel)</i> <i>Room: Salon J</i> P2 | Seeking a Sustainable Model in Cleveland <i>(Mastermind)</i> <i>Room: Rosslyn</i> M2 | Capturing Energy Upgrades in the Real Estate Transaction <i>(Panel)</i> <i>Room: Salon K</i> S2 | |
| 3:00-3:30 PM | Break | | | | | |
| 3:30 – 5:00 PM Session 3 <i>Choose one</i> | Testing Innovative Approaches to Engaging Consumers <i>(Point-Counterpoint)</i> <i>Room: Salon B</i> D3 | Working with Financial Partners <i>(Lightning Round)</i> <i>Room: Salon A</i> F3 | Expanding Programs through Creative Partnerships <i>(Panel)</i> <i>Room: Salon J</i> P3 | Concurrent Sessions | Going Deep versus Going Wide as a Program Strategy <i>(Point-Counterpoint)</i> <i>Room: Salon 1 M3a</i> Seeking a Sustainable Model in Oregon <i>(Mastermind)</i> <i>Room: Rosslyn</i> M3b | Successful Approaches to Workforce Training and Credentialing <i>(Panel)</i> <i>Room: Salon K</i> S3 |
| 7:00 – 10:30 PM | Monuments by Moonlight Tour (<i>optional, self-hosted</i>) | | | | | |

Wednesday, July 11, 2012 – Overview

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|---|--|---|---|---|---|--|
| 7:30 – 8:30 AM | Registration & Breakfast (<i>Foyer & Salon 3</i>) | | | | | |
| | Topical Tracks | | | | | |
| | <i>Driving Demand (D)</i> | <i>Financing (F)</i> | <i>Engaging Business Partners (P)</i> | <i>Sustainable Business Models (M)</i> | <i>Strategies for Success (S)</i> | |
| 8:30 – 10:00 AM Session 4 <i>Choose one</i> | Overcoming Barriers in the Multifamily Sector <i>(Panel)</i> <i>Room: Salon B</i> D4 | On-Bill Financing Today and Tomorrow <i>(Point-Counterpoint)</i> <i>Room: Salon A</i> F4 | Understanding Programs from the Contractor Perspective <i>(Lightning Round)</i> <i>Room: Salon J</i> P4 | Finding Funding for Sustainable Programs <i>(Small Group)</i> <i>Room: Rosslyn</i> M4 | Keeping It Simple from the Customer's Perspective <i>(Point-Counterpoint)</i> <i>Room: Salon K</i> S4 | |
| 10:00 – 10:30 AM | Break | | | | | |
| 10:30 – Noon Session 5 <i>Choose one</i> | People Will Talk: Making Energy Efficiency a Neighborhood Issue <i>(Panel)</i> <i>Room: Salon B</i> D5 | Aggressive Underwriting and Smart Product Delivery <i>(Panel)</i> <i>Room: Salon A</i> F5 | Evolving Utility Cost Effectiveness Test Criteria <i>(Panel)</i> <i>Room: Salon J</i> P5 | Concurrent Sessions | Getting to Whole Home Success <i>(Panel)</i> <i>Room: Rosslyn</i> M5a | Using Data to Monitor Market Transformation <i>(Panel)</i> <i>Room: Salon K</i> S5 |
| | | | | Seeking a Sustainable Model in Kentucky <i>(Mastermind)</i> <i>Room: Alexandria</i> M5b | | |
| Noon – 1:30 PM | Lunch & Lessons Learned: Danielle Sass Byrnett, U.S. DOE (<i>Salon 3</i>) | | | | | |
| 1:30 – 2:30 Session 6: Refining Lessons Learned <i>Choose one</i> | Marketing & Driving Demand <i>Room: Salon B</i> D6 | Financing & Incentives <i>Room: Salon A</i> F6 | Workforce & Contractor Relationships <i>Room: Salon J</i> P6 | Service Delivery & Program Administration <i>Room: Rosslyn</i> M6 | Data & Evaluation <i>Room: Salon K</i> S6 | |
| 2:30-3:00 PM | Closing Session: Bringing It All Together & Next Steps (<i>Salon 3</i>) | | | | | |



Home Energy Score

Conference Agenda: Detailed Session Descriptions

The following pages contain detailed descriptions of the conference sessions.

Conference Objectives:

- Showcase innovations, highlight accomplishments, and spark connections across residential energy efficiency programs
 - Capture and share diverse program implementation solutions, strategies, and techniques
 - Catalyze effective approaches to residential energy efficiency market transformation

Monday, July 9, 2012 – Detailed Session Descriptions

| | Better Buildings Neighborhood Program <i>Room: Salon K Room: Salon J Room: Salon A</i> | | | Home Performance with ENERGY STAR <i>Room: Salon B</i> | Home Energy Score <i>Room: Salon C</i> | Office Hours <i>Room: Salon H</i> |
|-------------------------------------|--|---|--|--|--|---|
| 1:00 – 2:00 PM <i>Choose one</i> | NGO Administrators Peer Exchange | Financing Peer Exchange | Data & Evaluation Peer Exchange | Office Hours <i>Sign-up at registration desk to meet with:</i> <ul style="list-style-type: none"> ▪ Caroline Hazard, SRA International ▪ Jason Bogovich, SRA International | Partner Opportunities and Program Update Joan Glickman, U.S. DOE <i>Interested in offering the Home Energy Score in your community? Come learn about partnership opportunities and get the latest updates on the national program launch.</i> | Office Hours <i>Sign-up at registration desk to meet with:</i> <ul style="list-style-type: none"> ▪ Chuck Booten, National Renewable Energy Laboratory / Building America ▪ Megan Billingsley, Lawrence Berkeley National Laboratory ▪ Jonathan Cohen, U.S. DOE |
| | <i>What are the key residential energy efficiency program planning, design, and implementation issues you'd like to discuss with your peers? The peer exchange sessions are an opportunity to highlight key implementation challenges, needs, and strategies and set the agenda of topics for peer exchanges over the next several months. They are also an opportunity to meet others who are facing the same types of opportunities and challenges as you. These sessions are open to everyone.</i> | | | | | |
| 2:15 – 3:15 PM <i>Choose one</i> | Business Planning with Pro Forma Tools Matt Golden, Efficiency.org and Robin LeBaron, National Home Performance Council <i>(bring your laptop)</i> <i>Compare your strategic or business plan projections and assumptions with those from other programs. Learn about a new contractor pro forma spreadsheet tool that grew out of the U.S. DOE Business Models Guide and uses real contractor data and projections for key variables. After working with the tool, engage in a facilitated discussion of needs and next steps for your own program.</i> | Workforce Peer Exchange <i>See description in 1:00 - 2:00 timeslot</i> | Multifamily / Low Income Peer Exchange <i>See description in 1:00 - 2:00 timeslot</i> | Stakeholder Meeting Ely Jacobsohn, U.S. DOE Courtney Moriarta, SRA International <i>Existing HPwES Sponsors and stakeholders will review current program activities and hear success stories from the field. The HPwES Team will also provide a preliminary review and analysis of the public comments received on the proposed HPwES Version 2. Come and share your input on the DOE's plans for the ongoing process to evolve the HPwES Program.</i> | Office Hours <i>Sign-up at registration desk to meet with:</i> <ul style="list-style-type: none"> ▪ Joan Glickman, U.S. DOE ▪ Hannah Wood, SRA International ▪ Cortney Krauss, SRA International ▪ Patty Kappaz, SRA International ▪ Glenn Dickey, SRA International | <ul style="list-style-type: none"> ▪ Steve Dunn, U.S. DOE ▪ Chris Lohmann, U.S. DOE ▪ Lani Macrae, U.S. DOE ▪ Yana Rasulova, U.S. DOE ▪ Nicole Reed, U.S. DOE ▪ Claudia Tighe, U.S. DOE ▪ Lauren Baugh, New West Technologies ▪ TJ Hansell, New West Technologies ▪ Michael Freedberg or Trisha Miller, HUD PowerSaver |
| | | Marketing & Driving Demand Peer Exchange <i>See description in 1:00 - 2:00 timeslot</i> | 3:15 PM Decision Tool Planning Meeting <i>Room: Lee (by invitation)</i> Danielle Sass Byrnett, U.S. DOE | | | |
| 3:30 – 4:30 PM <i>Choose one</i> | | | | Becoming a Sponsor Jason Bogovich, SRA International <i>Interested in exploring whether your program might want to become a HPwES sponsor? Come learn what it takes to be a HPwES sponsor, and what support DOE provides in return.</i> | Existing Partners Meeting Joan Glickman, U.S. DOE <i>Home Energy Score Partners will have the opportunity to meet with DOE representatives and other Partners to discuss progress to date, ask questions, and provide feedback on the program.</i> | |
| 4:45 – 5:45 PM <i>Choose one</i> | DOE Evergreen Funds Update <i>Room: Salon J (for DOE grant recipients)</i> Keith Dennis, U.S. DOE <i>Come hear an overview of what is planned for the Evergreen Funds and then engage in an interactive Q&A session.</i> | | | | | |
| 6:00 PM (Start) | Networking Opportunity (Atrium Lobby) <i>Dinner on your own</i> | | | | | |

Tuesday, July 10, 2012 – Detailed Session Descriptions

7:00 – 8:30 AM *Location: Foyer*

Showcase Setup

The showcase celebrates the collective effort and impact of residential upgrade programs participating in the conference and will share and inspire innovative branding, marketing, and customer relationship strategies. The theme for the showcase is "Making the Invisible Visible." See the many ways that programs are moving information about energy savings and building upgrades "out of hiding" from energy bills, walls, and attics into the spotlight through marketing, customer information, service transactions, and other program activities.

7:30 – 8:30 AM *Room: Foyer & Salon 3*

Registration & Breakfast

8:30 – 10:00 AM *Room: Salon 3*

Opening Plenary & Keynote Address

- Conference Overview & Agenda: Danielle Sass Byrnett, Better Buildings Neighborhood Program, U.S. DOE
- Welcome & DOE Update: Dr. Kathleen Hogan, Deputy Assistant Secretary for Energy Efficiency, U.S. DOE
- Framing the Challenge & Opportunity: Richard Kauffman, Senior Advisor to the Secretary, U.S. DOE

10:00 – 10:30 AM **Break**

Session Format Descriptions

1. **Lessons Learned Session** – Featured panelists will present informal perspectives on lessons and best practices relevant to the topic area based on their program experience. This will be followed by full-group discussion to solicit comments on the lessons identified and augment them through audience additions.
2. **Lightning Round** – These sessions will be focused on hearing from as many programs as possible in a short amount of time. Featured participants will kick this off by briefly sharing insights from their projects in no more than 3 minutes each, followed by Q&A and discussion.
3. **Mastermind Session** – These sessions will follow an established Mastermind methodology, which involves a circle of 10-20 people collectively identifying problems to address (or opportunities to exploit) and contributing solutions, with audience participation as well.
4. **Panel Session** – A selection of featured panelists will briefly present on a focused topic or case study. Presentations will be followed by Q&A and full-group discussion.
5. **Point-Counter Point Session** – The session facilitator will pose a provocative question or topic to explore from a variety of perspectives. Selected participants will kick off an interactive discussion with alternate perspectives based on their program experience.
6. **Small Group Discussions** – Participants will join focused small group discussions on a topic. Each small group will be facilitated by a featured participant who brings a unique perspective to the table.

Topical Tracks: Session 1 (10:30 – Noon) Choose One

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| <p>(D1: Driving Demand) <i>Room: Salon B</i></p> <p>Successful Marketing Strategies Moderator: Claudia Tighe, U.S. DOE Session Format: Lessons Learned Panelists:</p> <ul style="list-style-type: none"> ▪ Christie Rodriquez, Sacramento Municipal Utility District ▪ Thomas Bregman, Energize New York ▪ Will Baker, Midwest Energy Efficiency Alliance ▪ Will Villota, Clean Energy Works Oregon <p><i>Effective messages, efficient marketing channels, and strong communications partnerships are all key ingredients for driving consumer participation and retrofits. Panelists will present ideas on how to utilize partnerships, leverage communication vehicles, test messages, and maximize the impact of investments in marketing. Walk away with ideas for crafting compelling marketing programs as well as an understanding of costs, and models for how to carry effective practices into the future.</i></p> | <p>(M1: Sustainable Business Models) <i>Room: Rosslyn</i></p> <p>Shared Value in Utility & Efficiency Partnerships Moderator: Nikki Kuhn, Vermont Energy Investment Corporation Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Cynthia Adams, Local Energy Alliance Program ▪ Dimitrios Laloudakis, City of Phoenix ▪ Kerry O'Neil, Earth Markets ▪ Lisanne Altmann, Long Island Power Authority <p><i>Utilities are critical partners for many residential energy efficiency programs. Panelists will share their insights and lessons from wading into the waters of effective utility-efficiency program partnerships. Gain insights into how to foster relationships with utilities—in particularly the art of “selling the value” to the other partner.</i></p> |
| <p>(F1: Financing) <i>Room: Salon A</i></p> <p>The Role of Financing in Program Implementation Moderator: Tim Larson, Ross Strategic Session Format: Point-Counterpoint Panelists:</p> <ul style="list-style-type: none"> ▪ Christopher Kramer, Energy Futures Group ▪ Elise Avers, Massachusetts Department of Energy Resources ▪ Joanna Karger, Renewable Funding ▪ Tessa Shin, AFC First Financial Corporation <p><i>Growing evidence shows that financing is not the panacea for all of a residential energy efficiency program’s ills, but instead a useful tool for achieving program goals. Hear from experienced programs and third party lenders on crafting and administering successful loan programs. Participants will explore the role and value of financing in facilitating demand and developing effective finance programs.</i></p> | <p>(S1: Strategies for Success) <i>Room: Salon K</i></p> <p>Reaching Moderate Income Homeowners Moderator: Julie Hughes, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Adrianna Masuko, City of San Jose ▪ Ed Thomas, Electric and Gas Industries Association ▪ Elizabeth Babcock, City and County of Denver ▪ Mark Wyman, New York State Research & Development Authority <p><i>Upgrading homes for moderate income residents is critical for delivering on the promise of energy efficiency. Panelists will highlight partnerships and financing mechanisms that have successfully improved service delivery for this sector. Listen to successful strategies for developing specialized financial products, partnerships with low-income programs, and other approaches for reaching this often under-served market.</i></p> |
| <p>(P1: Engaging Business Partners) <i>Room: Salon J</i></p> <p>Connecting the Dots among Real Estate Stakeholders Moderator: Joan Glickman, U.S. DOE Session Format: Lightning Round Panelists:</p> <ul style="list-style-type: none"> ▪ Ben Gromicko, International Association of Certified Home Inspectors ▪ Ben Kaufman, Keller Williams GreenWorks ▪ Bill Garber, Appraisal Institute ▪ C. Blaine Illingworth III, American Society of Home Inspectors ▪ Denee Evans, HomeFree Nevada ▪ Jeremy Hutman, California Center for Sustainable Energy ▪ Laura Stukel, L.W. Reedy Real Estate ▪ Margaret O’Sullivan, Real Estate Business Intelligence <p><i>How and when can energy efficiency play a useful role in real estate transactions? You might find surprisingly different answers depending on whom you ask and where you live. Come hear how a wide range of professionals are working to make energy efficiency matter before, during, and after home sales.</i></p> | <p><i>This box intentionally left blank</i></p> |

Noon – 1:30 PM *Room: Salon 3*
Lunch & Keynote Address: Nancy Welsh, Builders of Hope

Topical Tracks: Session 2 (1:30 – 3:00 PM) Choose One

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| <p>(D2: Driving Demand) Room: Salon B</p> <p>Designing Custom Messages for Specific Markets Moderator: Lani Macrae, U.S. DOE Session Format: Small Group Panelists:</p> <ul style="list-style-type: none"> ▪ Beth Galante, Global Green New Orleans ▪ Brian Pippin, JEA ▪ Chris Granda, One Change ▪ Chuck Wilson, STEP-UP ▪ Laura Parsons, California Center for Sustainable Energy ▪ Susan Mazur- Stommen, American Council for an Energy-Efficient Economy <p><i>How do you know what messages work with what audience? Hear from featured participants that have worked on effective messages with a range of audiences from military personnel to builders to community-based organizations. One panelist will share a model that uses virtually no marketing money at all. Discuss a range of approaches to meet your specific needs in an intimate setting that enables conversation to get your questions answered.</i></p> | <p>(M2: Sustainable Business Models) Room: Rosslyn</p> <p>Seeking a Sustainable Model in Cleveland Mastermind Facilitator: Dane Reese Session Format: Mastermind Panelist:</p> <ul style="list-style-type: none"> ▪ Kristin Hall, City of Cleveland <p><i>How can programs be sustainable over the long term? This session will take a deep dive into a specific program in the City of Cleveland, which will serve as the "Host," to systematically break down their challenges and opportunities into discrete parts and engage a circle of up to 20 participants to collectively generate solutions. Each participant generates an original idea per topic, so 20 people will generate 20 ideas for addressing a given challenge or opportunity. An expert Mastermind facilitator will lead the session.</i></p> |
| <p>(F2: Financing) Room: Salon A</p> <p>Effective Incentive Structures Moderator: Nicole Reed, U.S. DOE Session Format: Lessons Learned Panelists:</p> <ul style="list-style-type: none"> ▪ Dana Fischer, Efficiency Maine ▪ Jonathan Doochin, U.S. Green Data Inc. ▪ Mary Templeton, State of Michigan & Michigan Saves ▪ Megan Billingsley, Lawrence Berkeley National Laboratory <p><i>Incentives are clearly an important aspect of energy efficiency programs, but what types, how much for what, and to whom? Panelists will share their insights from programs in New York, Oregon, Maine and Michigan. Come engage in active discussions to explore lessons from residential programs testing different incentive strategies to increase participation in comprehensive home energy upgrade programs.</i></p> | <p>(S2: Strategies for Success) Room: Salon K</p> <p>Capturing Energy Upgrades in the Real Estate Transaction Moderator: Joan Glickman, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Ben Kaufman, Keller Williams GreenWorks ▪ Bill Garber, Appraisal Institute ▪ Cynthia Adams, Local Energy Alliance Program ▪ Laura Stukel, L.W. Reedy Real Estate ▪ Margaret O’Sullivan, Real Estate Business Intelligence ▪ Robin LeBaron , National Home Performance Council <p><i>Why do energy efficient features in new homes capture the attention of buyers while energy upgrades in existing homes are overlooked? One reason is that new homes can be labeled by certified third parties. Learn from panelists about recent developments that allow homeowners to document and market energy improvements to existing homes at point of sale, and find out how fellow programs are creating MLS-friendly documents that can identify and promote the energy-improved home.</i></p> |
| <p>(P2: Engaging Business Partners) Room: Salon J</p> <p>Five Steps to a Profitable Contractor Base Moderator: Ely Jacobsohn, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Brad Geyer, Fayette County, Pennsylvania ▪ Emily Levin, Vermont Energy Investment Corporation ▪ Sam Flanery, Building Science Energy Services ▪ Sammy Chu, Suffolk County Department of Labor ▪ Tiger Adolf, Building Performance Institute <p><i>Contractors are on the “front lines” of energy efficiency program sales and services. Panelists will discuss sensible program design and administration, contractor certification and credentialing, effective communications, appropriate contractor requirements, and ongoing training and sales support. Expect to walk away with successful strategies to develop a profitable contractor base. Find out how to effectively engage with contractors and help them sell your program to their customers.</i></p> | <p align="center"><i>This box intentionally left blank</i></p> |

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| 3:00 – 3:30 PM Break | |
| Topical Tracks: Session 3 (3:30 – 5:00 PM) Choose One | |
| <p>(D3: Driving Demand) <i>Room: Salon B</i></p> <p>Testing Innovative Approaches to Engaging Consumers Moderator: Tom Beierle, Ross Strategic Session Format: Point-Counterpoint Panelists:</p> <ul style="list-style-type: none"> ▪ Aubrey Anaya, City of Phoenix ▪ Bob Coleman, California Center for Sustainable Energy ▪ Frank Rapley, Tennessee Valley Authority ▪ Lisanne Altmann, Long Island Power Authority ▪ Roderick Jackson, Oak Ridge National Laboratory <p><i>For many customers, seeing is believing. Featured panelists will highlight different approaches for illustrating to customers what home upgrades look like and can accomplish. Learn about and discuss the pros and cons of model homes, upgrade fairs, home energy measurement, and engaging consumers who are remodeling. Build your marketing toolbox in this session by hearing about specific experiences that can help you decide whether and how to take creative approaches back to your community.</i></p> | <p>(M3a: Sustainable Business Models) <i>Room: Salon 1</i></p> <p>Going Deep versus Going Wide as a Program Strategy Moderator: Courtney Moriarta, SRA International, Inc. Session Format: Point- Counterpoint Panelists:</p> <ul style="list-style-type: none"> ▪ Becca Murphy, Indianapolis Neighborhood Housing Partnership ▪ Dana Fischer, Efficiency Maine ▪ Steve Culbertson, Bevilacqua-Knight, Inc. ▪ Tim Miller, Clean Energy Works Oregon <p><i>Should programs push for deeper savings in fewer homes or shallower savings in more homes? Featured panelists will kick off a point-counterpoint discussion on these different models for home performance programs. Hear about distinct program approaches on both sides and decide what makes sense for you.</i></p> |
| <p>(F3: Financing) <i>Room: Salon A</i></p> <p>Working with Financial Partners Moderator: Bret Kadison, U.S. DOE Session Format: Lightning Round Panelists:</p> <ul style="list-style-type: none"> ▪ Brian Alfano, Clean Energy Works Oregon ▪ Jennifer Degen, City of Kansas City, Missouri ▪ Joanna Karger, Renewable Funding ▪ Joshua Curtis, City of Seattle ▪ Martha Jane Murray, William J. Clinton Foundation ▪ Tessa Shin, AFC First Financial Corporation <p><i>How do you establish an effective partnership between a program and a lender? Hear from both programs and lenders on a wide spectrum of issues ranging from what a program has to offer to lenders and coordinating with contractors to market loans products, to credit agnostic financing offered through employers and connecting to the secondary market. Explore how to get more out of financing programs.</i></p> | <p>(S3: Strategies for Success) <i>Room: Salon K</i></p> <p>Successful Approaches to Workforce Training and Credentialing Moderator: Benjamin Goldstein, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Andrea Petzel, City of Seattle ▪ Deacon Taylor, SolarCity ▪ Liz Robinson, Energy Coordinating Agency ▪ Steve Baden, Residential Energy Services Network ▪ Valencia Roner, City of Greensboro <p><i>In the growing market such as home performance, forms of contractor qualification like worker training and certifications become increasingly important. Panelists will describe what DOE, program administrators, and trade organizations are doing to ensure that valuable training and credentials are available to ensure consistent delivery of high quality work. Hear more about what you can do as a program administrator or contractor to ensure that the skills you deploy on the job are top notch.</i></p> |
| <p>(P3: Engaging Business Partners) <i>Room: Salon J</i></p> <p>Expanding Programs through Creative Partnerships Moderator: Caroline Hazard, SRA International Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Jensen Adams, Metropolitan Energy Center ▪ Nathalie Gonzalez, Los Angeles County Office of Sustainability ▪ Richard Faesy, Energy Futures Group ▪ Selma Tucker, City of Grand Rapids <p><i>Strong partnerships make strong programs. Panelists will share lessons learned about developing relationships with partners for marketing, data, and market access. They will describe results and ideas about structuring similar partnerships in other localities. Discover how your program can form partnerships in an effort to advance program objectives such as targeted marketing, access to data, and breaking into previously untapped market segments.</i></p> | <p>(M3b: Sustainable Business Models) <i>Room: Rosslyn</i></p> <p>Seeking a Sustainable Model in Oregon Mastermind Facilitator: Dane Reese Session Format: Mastermind Panelist:</p> <ul style="list-style-type: none"> ▪ Derek Smith, Clean Energy Works Oregon <p><i>How can the Portland, Oregon Better Buildings Neighborhood Program be sustainable after their ARRA grant ends? Take part in a Mastermind session, a well-established facilitation process in the business world to solve problems and develop opportunities, which will focus on Portland's program sustainability. In 15 months since the launch of the program, 2,298 residential evaluations have been completed, 996 residential energy upgrades have been completed, and 974 residential loans with a value of \$11.8 million have been provided. The executive director of Clean Energy Works Oregon will serve as the "Host." Participants will be engaged to generate solutions with some invited into an "inner circle" of no more than 20 people to generate original ideas, with others will be in the audience all having the chance to contribute as well. An expert Mastermind facilitator will lead the session.</i></p> |
| 7:00 – 10:30 PM Monuments by Moonlight Tour (optional, self-hosted) | |

Wednesday, July 11, 2012 – Detailed Session Descriptions

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|---|---|
| 7:30 – 8:30 AM Registration & Breakfast Room: Foyer & Salon 3 | |
| Topical Tracks: Session 4 (8:30 – 10:00 AM) Choose One | |
| <p>(D4: Driving Demand) Room: Salon B</p> <p>Overcoming Barriers in the Multifamily Sector Moderator: Steve Dunn, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Jill Maness, Austin Energy ▪ John Gitchell, Energy Smart Colorado ▪ Kimberly Loewen, Energy Impact Illinois ▪ Stockton Williams, HR&A Advisors, Inc. <p><i>Multi-family buildings are some of the most challenging to address operationally in terms of their scale and financially due to split incentives between owners and tenants. These qualities, however, also make them excellent candidates for benefiting from energy upgrades. Panelists will discuss how to capture the enormous energy-saving potential of multi-family buildings. Take away ideas about how to reach owners and renters with effective messages and incentives, and how to work with the financial sector to tap into multi-family energy savings.</i></p> | <p>(M4: Sustainable Business Models) Room: Rosslyn</p> <p>Finding Funding for Sustainable Programs Moderator: Danielle Sass Byrnett, U.S. DOE Session Format: Small Group Panelists:</p> <ul style="list-style-type: none"> ▪ Andy Holzhauser, Greater Cincinnati Energy Alliance ▪ Carla De La Chapa, CPS Energy ▪ Doug Coward, St. Lucie County, Florida ▪ Ludy Biddle, NeighborWorks of Western Vermont ▪ Melissa Glickman, Boulder County ▪ Yvonne Kraus, RePower Bainbridge <p><i>Identifying future revenue streams is critical to ensuring the sustainability of new home performance markets. Small group discussion will be led by featured participants with different plans for funding and continuing sustainable operations including: adding efficiency upgrades to housing support services, pursuing a utility implementation contract, identifying fee-based revenue streams, creating a community development finance institution, and securing long-term efficiency funding as a municipal utility. Discuss with your peers what approach might be right for you.</i></p> |
| <p>(F4: Financing) Room: Salon A</p> <p>On-Bill Financing Today and Tomorrow Moderator: Chris Lohmann, U.S. DOE Session Format: Point-Counterpoint Panelists:</p> <ul style="list-style-type: none"> ▪ Alfred Griffin, Citi ▪ Angela Ferrante, Energi ▪ Brian Alfano, Clean Energy Works Oregon ▪ Jeff Pitkin, New York State Research & Development Authority ▪ Lindsey Smith, The Electric Cooperatives of South Carolina <p><i>What is the role of on-bill loan repayment and innovative financing? Speakers will share their successes and challenges to establishing and implementing on-bill financing, getting utilities to the table, building on the fundamentals of on-bill, and the value proposition to lenders. Hear about on-bill financing as it is today and how it is evolving for tomorrow.</i></p> | <p>(S4: Strategies for Success) Room: Salon K</p> <p>Keeping It Simple from the Customer's Perspective Moderator: Tim Larson, Ross Strategic Session Format: Point-Counterpoint Panelists:</p> <ul style="list-style-type: none"> ▪ Joni Zacharisen, CPS Energy ▪ Lilah Glick, Greater Cincinnati Energy Alliance ▪ Mary Templeton, State of Michigan & Michigan Saves ▪ Nancy L. Hohns, EnergyWorks <p><i>Although residential energy efficiency programs are complicated, the process needs to appear simple to the customer in order to get to scale. Hear about alternate approaches to applying 'keep it simple' principles: offering an energy advisor, conducting neighborhood sweeps, and creating an online one stop shop. Engage in a lively discussion about how different strategies help homeowners cross the finish line by reducing the effort and complication involved in completing an energy upgrade, while also balancing the level of effort required by the program to implement each model.</i></p> |
| <p>(P4: Engaging Business Partners) Room: Salon J</p> <p>Understanding Programs from the Contractor Perspective Moderator: Mike Rogers, ABM Energy Session Format: Lightning Round Panelists:</p> <ul style="list-style-type: none"> ▪ Dan Kartzman, Powersmith Home Energy Solutions ▪ Gina Sullenberger, Weatherseal Insulation ▪ Jeff Bartos, Mark Group ▪ Michelle Griffith, Devere Insulation ▪ Peter Van Buren, TerraLogos Energy Group ▪ Rob Minnick, Minnick's Heating & Cooling <p><i>Successful programs need successful contractors. A diverse panel of contractors will highlight the needs of different types of home performance businesses and describe the strikingly similar concerns that confront them. Take away insights about what encourages participation and what doesn't.</i></p> | <p><i>This box intentionally left blank</i></p> |

| 10:00 – 10:30 PM Break | |
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| Topical Tracks: Session 5 (10:30 – Noon) Choose One | |
| <p>(D5: Driving Demand) Room: Salon B</p> <p>People Will Talk: Making Energy Efficiency a Neighborhood Issue Moderator: Joan Glickman, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Chris Badger, Vermont Energy Investment Corporation ▪ Dan Curry, Clean Energy Durham ▪ Helen Biersack, Conservation Services Group ▪ Roger Smith, Connecticut Neighbor to Neighbor Energy Challenge <p><i>Neighborhood sweeps and other community events are becoming more popular as methods for getting the word out about energy efficiency. But, do they work? Panelists will describe how programs in diverse communities across the U.S. are using neighbor-to-neighbor and other locally-based approaches to motivate action. Learn what works, what doesn't, and how to track the effectiveness of your outreach efforts.</i></p> | <p>(M5a: Sustainable Business Models) Room: Rosslyn</p> <p>Getting to Whole Home Success Moderator: Nicole Reed, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Elizabeth Babcock, City and County of Denver ▪ Jane Bugbee, The United Illuminating Company ▪ Kellie Stickney, SustainableWorks <p><i>Deep energy savings typically require upgrades across the whole home, from the basement to the peak of the roof. Panelists will talk about their challenges and successes in driving towards deeper energy savings from whole home approaches, including what not to do and why they now take the approaches that they do. Hear about programs ranging from a subsidized direct install program transitioning to a market-based approach, to a multi-location pilot that achieved hundreds of deep retrofits, to a city that transitioned its focus from commercial to residential upgrades with recent success.</i></p> |
| <p>(F5: Financing) Room: Salon A</p> <p>Aggressive Underwriting and Smart Product Delivery Moderator: Julie Hughes, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Becca Harmon Murphy, Indianapolis Neighborhood Housing Partnership ▪ Jeff Pitkin, New York State Energy Research & Development Authority ▪ Tessa Shin, AFC First Financial Corp <p><i>Pushing the boundaries of underwriting criteria is an important piece of developing financial instruments such as loans. How low can you go, without putting your organization or the borrower at risk? Come hear from three organizations that have developed aggressive financing products—and have created successful marketing and delivery channels by working closely with contractors and loan applicants. Gain insights on working with various stakeholders—who often have competing interests—to strike the right balance in product development and service delivery.</i></p> | <p>(S5: Strategies for Success) Room: Salon K</p> <p>Using Data to Monitor Market Transformation Moderator: Dale Hoffmeyer, U.S. DOE Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Betsy Kleinfelder, The Sustainability Institute ▪ Kat Donnelly, Earth Markets ▪ Melissa Glickman, Boulder County ▪ Patrick Roche, Conservation Services Group <p><i>Programs are put in place to affect local and regional market transformation, yet too often the infrastructure is not there to monitor progress. Hear from panelists about how they created feedback loops to direct and keep an eye on the effectiveness of their program's efforts. Gather ideas on how to develop a market assessment early on, implement strategies and tools for obtaining feedback from customers and contractors, and adapt to reach your target market.</i></p> |
| <p>(P5: Engaging Business Partners) Room: Salon J</p> <p>Evolving Utility Cost Effectiveness Test Criteria Moderator: Courtney Moriarta, SRA International Session Format: Panel Panelists:</p> <ul style="list-style-type: none"> ▪ Brian Gitt, Bevilacqua-Knight, Inc. ▪ Kara Saul Rinaldi, National Home Performance Council <p><i>Cost-effectiveness tests are often critical for utility energy efficiency programs. Panelists will highlight key cost-effectiveness test issues and describe current initiatives designed to challenge assumptions and stimulate change in how these tests are applied to home performance programs. The National Home Performance Council will describe its current effort to evaluate alternative approaches. Come and offer insights concerning cost-effectiveness tests from your experience, and hear how your colleagues around the country are addressing this issue.</i></p> | <p>(M5b: Sustainable Business Models) Room: Alexandria</p> <p>Seeking a Sustainable Model in Kentucky Mastermind Facilitator: Dane Reese Session Format: Mastermind Panelist:</p> <ul style="list-style-type: none"> ▪ Andrew Isaacs, Kentucky Housing Corporation <p><i>How can programs continue after ARRA funding runs out and ensure sustainable delivery of home performance over the long term? This session will take a deep dive into the award-winning Kentucky Home Performance with Energy Star program, which has completed 1,018 single family energy efficient retrofits resulting in over \$10,850,000 of business over an 18 month period. The Kentucky program administrator will serve as the "Host," to systematically break down their challenges and opportunities into discrete parts then engage a circle of up to 20 participants to collectively generate solutions. An expert Mastermind facilitator will lead the session.</i></p> |

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| Noon – 1:30 PM <i>Room: Salon 3</i> Lunch & Lessons Learned: Danielle Sass Byrnett, U.S. DOE | |
| Refining Lessons Learned: Session 6 (1:30 – 2:30 PM) Choose One <i>What are key lessons to share with colleagues and others planning and implementing residential energy efficiency programs? These sessions will review insights contributed by participants throughout the conference and generate discussion on gaps and future needs. The output from these sessions will form the basis for DOE's lessons learned conference summary and future guidance.</i> <i>Please come ready to discuss lessons from your program and key program design and implementation questions you have.</i> | |
| <i>Room: Salon B</i> (D6) Marketing & Driving Demand Moderator: Jonathan Cohen, U.S. DOE | <i>Room: Rosslyn</i> (M6) Service Delivery & Program Administration Moderator: Danielle Sass Byrnett, U.S. DOE |
| <i>Room: Salon A</i> (F6) Financing & Incentives Moderator: Nicole Reed, U.S. DOE | <i>Room: Salon K</i> (S6) Data & Evaluation Moderator: Dale Hoffmeyer, U.S. DOE |
| <i>Room: Salon J</i> (P6) Workforce & Contractor Relationships Moderator: Claudia Tighe, U.S. DOE | <i>This box intentionally left blank</i> |
| 2:30 – 3:00 PM <i>Room: Salon 3</i> Closing Session: Bringing It All Together and Next Steps | |