



**Oklahoma Renewable Energy Project Development and Finance Workshop  
AGENDA**

**June 9–11, 2015  
Riverwind Hotel and Casino  
1544 State Highway 9  
Norman, OK 73072  
405-322-6000**

**Learning Objectives**

- 1) Understand the process for and potential pitfalls of developing and financing community- and facility-scale renewable energy projects
- 2) Determine how the development of a renewable energy project could further a Tribe's goals
- 3) Learn from the experience of other tribal efforts in renewable energy development.

**Anticipated Results:** Attendees will be comfortable discussing renewable energy project development possibilities with project developers and project financing options with potential investors. Potential tribal roles will be clear and participants will better understand the five-step project development and financing process.

**What to Do Ahead of Time:**

- Email your Tribe's strategic energy plan (if available) to [tribalworkshops@nrel.gov](mailto:tribalworkshops@nrel.gov)
- Email available relevant background and information on existing or planned renewable energy projects to [tribalworkshops@nrel.gov](mailto:tribalworkshops@nrel.gov)
- Be prepared to identify and share with the group your primary reasons for coming/what you hope to get out of the training
- Consider whether your project would benefit from up to 40 hours of technical assistance from DOE. You can learn more about it here: [www.energy.gov/indianenergy/technical-assistance](http://www.energy.gov/indianenergy/technical-assistance). If interested, bring an outline of what type of assistance you might need. We will have technical assistance experts from DOE's National Renewable Energy Laboratory (NREL) on hand who can talk through the various offerings and what might make the most sense for your project, and sign you up onsite!

**What to Bring With You:**

Your computer so that you can connect with technical experts back at NREL (please be sure you have Skype installed on your computer) and download and use models and tools onsite.

[www.energy.gov/indianenergy](http://www.energy.gov/indianenergy)



**Day 1 – Tuesday, June 9, 2015**

<b>Time</b>	<b>Topic</b>	<b>Speaker/Activity</b>
8:15–8:30 a.m.	Registration and Networking (Light Breakfast Provided)	
8:30–9:00 a.m.	Welcome	Chris Deschene, Director, U.S. Department of Energy (DOE) Office of Indian Energy Policy and Programs  Sarai Geary, Program Manager, DOE Office of Indian Energy Policy and Programs  Kara Berst, Chickasaw Nation (Host Tribe)
9:00–9:30 a.m.	Workshop Overview	Jason Coughlin, NREL
9:30–9:45 a.m.	Break and Networking	Video—DOE Energy 101: Wind Turbines <a href="https://www.youtube.com/watch?v=EYYHfMCw-FI&amp;index=2&amp;list=PLACD8E92715335CB2">https://www.youtube.com/watch?v=EYYHfMCw-FI&amp;index=2&amp;list=PLACD8E92715335CB2</a>
9:45–10:15 a.m.	Introductions Around the Room	Jason Coughlin, NREL
10:15–10:30 a.m.	Break and Networking	Video—DOE Energy 101: Home Energy Assessment <a href="https://www.youtube.com/watch?v=YolBP0-vkBU&amp;index=19&amp;list=PLACD8E92715335CB2">https://www.youtube.com/watch?v=YolBP0-vkBU&amp;index=19&amp;list=PLACD8E92715335CB2</a>
10:30–11:30 a.m.	Strategic Energy Planning	Sherry Stout, NREL Strategic Energy Planning Handbook Walkthrough  Activity 1: Identify Key Stakeholders Activity 2: Strategic Energy Planning Key Questions/Considerations  Objective: Understand which key stakeholders should be involved and some key questions to consider when developing a strategic energy plan.
11:30–11:45 a.m.	Break and Networking	
11:45 a.m.–12 p.m.	Case in Point	Jill S. Jones, Board Chair, Osage Nation Energy Services, LLC  Overview of Osage Nation's current energy initiatives and planning efforts for renewable energy projects and discussion of stakeholders, current issues with renewable projects in Osage County, and expanding the future vision to include renewables.
12:00–1:00 p.m.	Lunch (Provided) and Networking	Video—American Wind Energy Association: “I Am the Wind” <a href="https://www.facebook.com/AmericanWindEnergyAssociation/videos/vb.9423488774/10152741253513775/?typ">https://www.facebook.com/AmericanWindEnergyAssociation/videos/vb.9423488774/10152741253513775/?typ</a>



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1:00–1:30 p.m.	State of Oklahoma Strategic Energy Planning Grants	Kylah McNabb, Oklahoma State Energy Office  Discussion about the state’s energy goals, renewable energy program, and the availability of up to \$10,000 in grants for strategic energy planning, including how to apply and due dates.
1:30–2:00 p.m.	U.S. Department of Agriculture (USDA) Energy Efficiency and Renewable Energy Funding Opportunities	Ryan McMullen, Oklahoma State Director for Rural Development, USDA  Overview of USDA Rural Energy Assistance Program funds available for energy efficiency and renewable energy projects.
2:00–2:10 p.m.	Break and Networking (Refreshments)	Video—DOE Energy 101: Solar <a href="https://www.youtube.com/watch?v=OelhlcPVtKE&amp;index=15&amp;list=PLACD8E92715335CB2">https://www.youtube.com/watch?v=OelhlcPVtKE&amp;index=15&amp;list=PLACD8E92715335CB2</a>
2:10–2:45 p.m.	Case in Point	Kara Berst, Chickasaw Nation  Overview of a DOE grant project to upgrade lighting in 12 Chickasaw Nation facilities that resulted in \$150,000 in savings.
2:45–3:00 p.m.	Break and Networking (Refreshments Provided)	Video—DOE Energy 101: Geothermal Heat Pumps <a href="https://www.youtube.com/watch?v=y_ZGBhy48YI&amp;list=PLACD8E92715335CB2&amp;index=18">https://www.youtube.com/watch?v=y_ZGBhy48YI&amp;list=PLACD8E92715335CB2&amp;index=18</a>
3:00–4:00 p.m.	Overview of the Five-Step Energy Process for Developing Tribal Energy Projects	Jason Coughlin, NREL
4:00–4:15 p.m.	Break and Networking	
4:15–4:45 p.m.	Step 1 Project Potential	Project Potential Sherry Stout, NREL



**Day 2 – Wednesday, June 10, 2015**

<b>Time</b>	<b>Topic</b>	<b>Speaker/Activity</b>
8:45–9:00 a.m.	Coffee and Networking (Light Breakfast Provided)	
9:00–9:45 a.m.	Step 1 Continued Project Potential  Activity	Sherry Stout, NREL  Activity: Resource Map/Siting  Objective: Use maps to work through the steps involved in evaluating resource conditions for a potential renewable energy project site.
9:45–10:00 a.m.	Break and Networking	
10:00–10:30 a.m.	Case in Point	Ken Bellmard, Kaw Nation  Discussion of navigating the legal challenges when developing a wind project, including lessons learned and key takeaways from the Chilocco Wind Park project.
10:30–10:45 a.m.	Break and Networking	Video—DOE Energy 101: Biofuels <a href="https://www.youtube.com/watch?v=-ck3FYVNI6s&amp;list=PLACD8E92715335CB2&amp;index=10">https://www.youtube.com/watch?v=-ck3FYVNI6s&amp;list=PLACD8E92715335CB2&amp;index=10</a>
10:45–11:15 a.m.	Step 2: Project Options  Activity	Jason Coughlin, NREL  Activity: Tribal Roles  Objective: Evaluate and discuss case studies to understand the various roles that a Tribe can assume on a project.
11:15–11:30 a.m.	Break and Networking	
11:30 a.m.–12:00 p.m.	Project Options Continued	Jason Coughlin, NREL
12:00–1:00 p.m.	Lunch (Provided) and Networking	Video—DOE Women In STEM: Suzanne Singer, Lawrence Livermore National Laboratory <a href="https://www.youtube.com/watch?v=Lg9BY_9N_VI">https://www.youtube.com/watch?v=Lg9BY_9N_VI</a>
1:00–2:00 p.m.	Step 3: Project Refinement  Activity	Jason Coughlin, NREL  Activity: Finance Advantages and Disadvantages  Objective: Get to know the financial options that are available for developing a renewable energy project and the advantages and/or disadvantages that come with each financial model.
2:00–2:15 p.m.	Break and Networking	Video—DOE Energy 101: Energy Efficient Commercial Buildings <a href="https://www.youtube.com/watch?v=5VMXL3IEYTI&amp;list=PLACD8E92715335CB2&amp;index=4">https://www.youtube.com/watch?v=5VMXL3IEYTI&amp;list=PLACD8E92715335CB2&amp;index=4</a>



<p>2:15–2:45 p.m.</p>	<p>Project Refinement (Procurement)</p> <p>Activity</p>	<p>Jason Coughlin, NREL</p> <p>Activity: Request for Proposal (RFP) Ranking Objective: Identify values, risks, and other criteria that should be used in evaluating an Energy Performance Contractor’s RFP response.</p>
<p>2:45–3:00 p.m.</p>	<p>Break and Networking (Refreshments Provided)</p>	
<p>3:00–3:30 p.m.</p>	<p>General Services Administration (GSA) Procurement</p>	<p>Brian Talley, Regional Representative, Oklahoma GSA</p> <p>Overview of how Tribes are eligible to save thousands of dollars with GSA purchasing on many items such as vehicles, office supplies, contractors, and energy efficiency savings contractors.</p>
<p>3:30–4:00 p.m.</p>	<p>Step 4: Project Implementation</p>	<p>Sherry Stout, NREL</p>
<p>4:00–4:10 p.m.</p>	<p>Break and Networking</p>	
<p>4:10–4:45 p.m.</p>	<p>Case in Point</p>	<p>Donny Vaughn, Geothermal Project Manager, Citizen Potawatomi Nation</p> <p>Discussion about implementation and operations and maintenance of multiple geothermal projects.</p>
<p>4:45–5:15 p.m.</p>	<p>Wrap-Up and Activity</p>	<p>Activity: Jeopardy!</p>



**Day 3 – Thursday, June 11, 2015**

<b>Time</b>	<b>Topic</b>	<b>Speaker/Activity</b>
8:45-9:00 a.m.	Plan for Day 3	Around the Room: Taking ideas home – what has inspired you?
9:00–9:45 a.m.	Operations & Maintenance (O&M)	Sherry Stout, NREL  Activity: O&M Crossword Puzzle  Objective: Have fun learning about O&M by completing the crossword puzzle.
9:45–10:00 a.m.	Break and Networking	
10:00–10:30 a.m.	Technical Assistance: System Advisory Model (SAM) Live Walkthrough	Jason Coughlin and Sherry Stout, NREL
10:30–10:45 a.m.	Break and Networking	
10:45–11:00 a.m.	Technical Assistance: Apply Onsite	Jason Coughlin and Sherry Stout, NREL
11:00–11:15 a.m.	Evaluation of Workshop	Sherry Stout
11:15 a.m.–12:00 p.m.	Lunch (Provided) and Networking	
12:00–1:00 p.m.	Technical Assistance: Apply Onsite (Continued)	Jason Coughlin and Sherry Stout, NREL
1:00–2:30 p.m.	Technical Assistance: Ordering Supplies Through the GSA Website	Brian Talley, GSA

