

# **Energy Performance Contracting Workshop For Public Housing Authorities**

## **AGENDA**

June 14-18 2004

Chicago, Illinois (Room 2205, 77 W. Jackson)

### **Instructors**

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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 14, 2004**

8:00 – 9:00	Welcome and Introductions
9:00 – 9:45	Introduction to Performance Contracting
9:45 – 10:00	BREAK
10:00 – 11:00	HUD's Energy Incentives and Performance Contracting
11:00 – 12:00	Energy Opportunities in Public Housing
12:00 – 12:30	Case Study #1
12:30 – 2:00	LUNCH
2:00 – 3:00	Utility Analysis and Site Selection
3:00 – 3:15	BREAK
3:15 – 5:00	Exercise 1: Site Selection

### **TUESDAY — JUNE 15, 2004**

8:00 – 8:30	Review
8:30 – 9:15	Group Presentation 1: Sites Selected and Why
9:15 – 10:15	Developing and Issuing the RFP
10:15 – 10:30	BREAK
10:30 – 11:00	Exercise 2: Developing the RFP and Performance Contracting Team

**TUESDAY — JUNE 15, 2004 (cont'd)**

11:00 – 11:30 Group Presentation 2: RFP Modifications and Team Building  
11:30 – 12:00 Case Study #2  
12:00 – 1:30 LUNCH  
1:30 – 2:15 Selecting the ESCO, Part 1: Reviewing RFP Responses  
2:15 – 3:00 Exercise 3: Evaluating the RFP Responses  
3:00 – 3:15 BREAK  
3:15 – 4:00 Exercises 3: Evaluating the RFP Responses (continued)  
4:00 – 4:45 Group Presentation 3: ESCOs Short Listed and Why  
4:45 – 5:00 Selecting the ESCO, Part 2: Interviewing the ESCOs

**WEDNESDAY — JUNE 16, 2004**

8:00 – 8:30 Review  
8:30 – 10:00 Exercise 4: Interviewing the ESCOs  
10:00 – 10:15 BREAK  
10:15 – 11:30 Negotiating an Energy and Water Audit Agreement  
11:30 – 12:00 Case Study #3: 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 17, 2004**

8:00 – 8:30 Review  
8:30 – 9:15 Reviewing the Audit Results  
9:15 – 10:00 Exercise 5: Looking at Your Audit  
10:00 – 10:15 BREAK  
10:15 – 12:00 Exercises 5: Looking at Your Audit (continued)  
12:00 – 12:30 Case Study #4  
12:30 – 2:00 LUNCH  
2:00 – 3:00 Group Presentation 4: Measures Selected and Why  
3:00 – 3:15 BREAK  
3:15 – 4:00 Measurement, Verification, and Commissioning  
4:00 – 5:00 Negotiating an Energy and Water Services Agreement

**FRIDAY — JUNE 18, 2004**

8:00 – 8:30 Review  
8:30 – 10:00 Exercise 6: Negotiating the Contract  
10:00 – 10:30 Case Study #5  
10:30 – 10:45 BREAK  
10:45 – 11:45 Implementing the Project  
11:45 – 12:15 Feedback and Distribution of Course Certificates