FINANCING ENERGY EFFICIENCY PROJECTS FOR FACILITIES AND SERVICES

May 12, 2020
1:00 pm – 2:15 pm

Sponsored by:

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TODAY’S MODERATOR

CRYSTAL GUZMAN
ENVIRONMENT & DEVELOPMENT PLANNER
NORTH CENTRAL TEXAS COUNCIL OF GOVERNMENTS

WELCOME EVERYONE!

www.conservenorthtexas.org
TODAY’S SPEAKERS

MATT LOMBARDO
SALES DEVELOPMENT MANAGER
ENERGY & SUSTAINABILITY SERVICES
SCHNEIDER ELECTRIC

LISA K. TAMES
SENIOR VICE PRESIDENT
ENERGY SERVICES
BANK OF AMERICA

DUB TAYLOR
CHIEF OPERATING OFFICER
TEXAS PACE AUTHORITY

EDDY TREVINO
DIRECTOR
STATE ENERGY CONSERVATION OFFICE (SECO)
WHAT IS NCTCOG?

• Voluntary association of local governments
• Established in 1966
• Assists local governments in:
  • Planning for common needs
  • Cooperating for mutual benefit
  • Recognizing regional opportunity
  • Resolving regional programs
  • Making joint decisions
• One of 24 COGs in Texas
• www.nctcog.org
NCTCOG ENERGY MANAGEMENT RESOURCES

- Webinar recordings
- Workshop presentations
- Toolkits
- White papers
- Case studies
- Best practices
- Videos
- Training presentations

www.conservenorthtexas.org
www.gosolartexas.org
www.dfwcleancities.org
Guaranteed Energy Savings
Performance Contracting Basics

May 12, 2020
Presented by Matt Lombardo, Outreach Committee, ESC Texas Chapter
The Energy Services Coalition (ESC) is a national network of public, private, and non-profit sector experts engaged in promoting the adoption of energy efficiency and building upgrades through guaranteed energy savings performance contracting (GESPC).

The ESC Texas Chapter is co-chaired by the State Energy Conservation Office and is composed of public sector representatives, state agencies, energy service companies, and non-profit energy efficiency organizations.
ESC-TX MEMBERS

- Ameresco, Inc.
- Aqua Energy Services, LLC
- Atlantic Energy Concepts
- Bank of America
- Bee
- Climatec
- D.A. Davidson & Co.
- E3 Entegral Solutions, Inc.
- Eco Engineering, Inc
- Energy Mitigation
- Envocore
- ESG – a CenterPoint Energy Company
- JAYKAL LED Solutions, Inc.
- Johnson Controls International, Inc.
- McKinstry
- METCO Engineering, Inc.
- Owens Corning
- Performance Services, Inc.
- Schneider Electric
- Siemens
- SmartWatt Inc.
- South-central Partnership for Energy Efficiency as a Resource
- TEESI Engineering
- Texas State Energy Conservation Office
- The Way Companies
- Trane
- Waypoint Lighting
WHY ARE WE DOING THIS WEBINAR?

• Clarify confusion about GESPC value and process
• Education and market development
• Because we believe in it!
Guaranteed Energy Savings
Performance Contracting Basics
Guaranteed Energy Savings Performance Contracting (GESPC) is a procurement method for energy, water, renewables, and resilient capital improvements that uses guaranteed utility and maintenance savings to pay for the cost of the improvements.
“It is **not a way to save money**, it is a way to redirect costs and have a positive environmental impact.”

“Performance Contracting is not a **financing mechanism**.”

“Something that will pay for **all the needs** with energy savings!”

“**It’s not too good to be true!**”
ENABLING LEGISLATION

- State Agencies
  - Title 10, Texas Government Code §2166.406
  - + SECO Guidelines and Review
- Public Higher Education
  - Title 3, Education Code §51.927
  - + THECB (SECO Guidelines and Review)
- Cities and Counties
  - Title 9, Local Government Code §302
- Public Schools (K-12)
  - Title 2, Education Code §44.901
WHAT IS THE VALUE OF A GESPC FOR MY ORGANIZATION?

GESPCs use existing budget to fund needed capital improvements. Energy services companies (ESCOs) provide technical expertise and well-tuned project management programs that help ensure you are using the best technology for your needs. Savings is guaranteed, shifting the risk to the ESCO while helping you meet your efficiency and asset management goals.

GESPCs Help Address:

- Deferred maintenance
- Building modernization
- Budget constraints
- Limited in-house capacity or expertise
  - Limited CIP funds
- Mitigates / eliminates risk
  - Simplification
- Holistic rather then piecemeal
  - Long term cost savings
WHAT IS THE VALUE OF A GESPC FOR MY ORGANIZATION?

BEFORE GESPC

Public Organization

Utilities
O&M
Capital Costs
WHAT IS THE VALUE OF A GESPC FOR MY ORGANIZATION?

AFTER GESPC

Public Organization

Utilities
O&M
Capital Costs

Re-directs Existing Budget into Client Facilities
WHAT IS THE VALUE OF A GESPC FOR MY ORGANIZATION?

Utilities / Reactive Maintenance

OR

Progress

- Fix Deferred Maintenance
- Maximize Bond Measures
- Improved Working/Learning Environment
GESPC ALIGNS YOUR STAKEHOLDERS NEEDS

- Decision Maker
- Energy Manager / Sustainability
- Community
- Legal
- Construction
- Finance
- Maintenance
- Procurement
1. Build Internal Team
   Build a multi-disciplinary internal team to manage GESPC

2. Preliminary Audit
   Free audit to identify possible

3. Request for Qualifications (RFQ)
   Issue RFQ tailored to entity’s needs and goals

4. Select Partner ESCO
   Conduct interviews with shortlist of providers, check references

5. Investment Grade Audit (IGA) and Scoping
   ESCO performs detailed audit to determine scope

6. Submissions
   ESCO submits results of IGA, M&V Plan, sample documentation, and draft contract

7. Third-Party Review
   IGA and supporting documentation reviewed by third party engineer

8. Project Construction
   Management and oversight of construction

9. Post Construction
   Operations and Maintenance (O&M) Measurement and Verification (M&V)
DEFINING PROJECT SCOPE
Preliminary Assessment vs. Investment Grade Audit

**Preliminary Assessment**
- Done at no cost to client
- Short few hours at site
- Estimated savings
- No contractor bids, estimated costs
- Used to determine if further action is warranted
- Product is a project profile

**Investment Grade Audit**
- Done at cost to client
- Duration of 2-6 months
- Guaranteed savings
- Contractor bids, guaranteed costs
- Used to establish the scope of the work agreement
- Intended product is an GESPC
PICKING PARTNERS

Researching & Picking an Energy Services Company (ESCO)
- References - Talk to successful (and unsuccessful) projects
- Interview ESCO teams including day-to-day team
- Site visits

Request for Qualifications (RFQ) vs. Request for Proposals (RFP)
- What is the difference?
- Why is it important?
- Are there other ways to procure?
  - Interlocal / Co-op.
FINANCING

GESPC is NOT a Financing Mechanism, it’s a Procurement Methodology

There are many ways to finance a GESPC:

- Tax Exempt Lease Purchase
- Maintenance Tax Note
- LoanSTAR
- Cash / Bond
- Utility Rebates *if available

Title 10, Texas Government Code §2166.406(g):

An energy savings performance contract with respect to buildings or facilities may be financed:

1. under a lease/purchase contract that has a term not to exceed 20 years from the final date of installation and that meets federal tax requirements for tax-free municipal leasing or long-term financing, including a lease/purchase contract under the master equipment lease purchase program administered by the Texas Public Finance Authority under Chapter 1232;
2. with the proceeds of bonds; or
3. under a contract with the provider of the energy or water conservation measures that has a term not to exceed the lesser of 20 years from the final date of installation or the average useful life of the energy or water conservation or usage measures.
Measurement and Verification

- Measurement & verification (M&V) activities ensure legally and contractually required savings guarantees are met in an energy savings performance contract.

When done correctly, M&V:

- Appropriately allocates risk
- Reduces uncertainty of savings estimates
- Accurately assesses costs and energy savings
- Potentially identifies operations and maintenance issues

- Utilizes International Performance Measurement & Verification Protocol (Industry Standard)
RESOURCES

• Energy Services Coalition
  • Case studies
  • Sample contract documents
• State Energy Conservation Office
  • Energy Savings Performance Contracting Guidelines for State Agencies
  • Enabling Legislation
• Department of Energy
  • Energy Savings Performance Contracting (ESPC) Toolkit
• SPEER
  • Energy Savings Performance Contracting – From the Experts
WANT TO LEARN MORE ABOUT ESC?

ESC Texas Chapter Meeting
Wednesday, June 3, 2020, 1-3 PM
THANK YOU!

Matt Lombardo
214-507-0175 | matt.lombardo@se.com
Financing for Energy Efficiency Projects for Facilities and Services

May 12, 2020
Financing Options
Guaranteed Energy Performance Contracting

- Tax-exempt Lease Purchase Agreements
- Certificates of Obligations
- Maintenance Tax Obligations
- Personal Property Financial Contract Obligations
- Revenue Backed Obligations
- General Obligation Bonds
- Texas LoanSTAR Program (SECO)
What is a Tax-Exempt Lease Purchase Finance Agreement?
IT'S A LOAN!
Tax-Exempt Lease Purchase Agreement

Fundamentals

- An installment purchase, conditional sale or lease with an option to purchase for nominal value
- Non-appropriation Clause or Firm Term
- Title to the equipment is typically retained by the Lessee
- Interest income is Tax-exempt to the lessor who passes the tax benefit to the Tax-exempt entity in the form of a lower interest cost
Advantages of Equipment and Lease Financing

- 100% financing of project costs
- Financing tool that allows Tax-exempt entities to acquire essential use equipment
- Ability to match financing terms to the useful life of the assets
  - Flexible payment structure
  - Voter approval may not be required
  - Low transaction expenses
  - Rate locks may be available
  - Simplified process and flexibility to meet timing requirements
- Ability to stretch reduced Capital Improvement Plan budgets
The issuer’s obligations under the Lease/Purchase Agreement are independent of the vendor’s obligations under the Energy Performance Contracting Agreement.
Various Project Profiles

Energy Performance Contracts

Central Utility Plants, District Energy/DG Facilities

Renewable Energy
Case Study:
El Paso Independent School District

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<th><strong>Tax-exempt Lease Purchase Financing</strong></th>
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<td><strong>Transaction Size:</strong></td>
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<td>Phase 1 - $10.8 Million</td>
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<td><strong>Structure:</strong></td>
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<td>Tax-exempt Equipment Lease Purchase Agreement</td>
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<td><strong>Tenor:</strong></td>
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<td>Phase 1-15 years plus a 12 month installation period</td>
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<td><strong>Equipment Type:</strong></td>
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<td>Interior and exterior LED lighting, HVAC Upgrades, water conservation measures, building automation system and controls, sub-metering</td>
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<td><strong>Energy Savings:</strong></td>
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<tr>
<td>Phase 1 - $14.8 Million in Guaranteed Energy Savings</td>
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THANK YOU!

Lisa Tames
Energy Services, Bank of America
lisa.tames@bofa.com
646-855-4415
A TX-PACE PRIMER for LOCAL GOVERNMENTS
WHAT IS TX-PACE?

TEXAS PROPERTY ASSESSED CLEAN ENERGY (FINANCING)

A simple way of paying for capital projects with no money out of pocket

What: Long term, low cost 100% financing for energy efficiency, water conservation and distributed generation projects

Where: Commercial (including non-profit), industrial (manufacturing/agricultural) and multi-family (5+units) properties

How: Repaid via special property assessment over the useful life of the improvements

- State Authorized
- Local Government Enabled & Non-profit Administered
- Voluntary & Open Market
PACE is a WIN-WIN-WIN

- **Property Owners** - lower utility bills, energy independence, energy efficiency, property value increase
- **Contractors** - source of increase in business, more local hiring, best practices, keeping up with technology advancements
- **Lenders** - new loans, steady & stable process, fully collateralized, Tax Assessment lien position, improved asset value
- **Communities** - increased economic development and jobs, improved building infrastructure, more appealing building stock and plants
- **State of Texas** - reduced peak demand, enhanced grid reliability, distributed generation as resilient power source, improved air quality, water resource conservation
WHAT TX-PACE DOES

- Creates Local Jobs
- Improves Resource Conservation
- Saves Money
Texas PACE answers the question...
How are we going to pay for it?

TX-PACE is transforming how developers, owners, and contractors look at projects.

Proving that there is a clear path forward for energy and water efficiency, and distributed generation projects in existing buildings and plants.
ELIGIBLE IMPROVEMENTS

Projects that reduce energy or water usage or generate energy onsite

**Energy**
- High efficiency chillers, boilers, and furnaces
- Mechanical system modernization
- Air cooled systems to water or geothermal cooled systems
- Energy management systems and controls
- High efficiency lighting upgrades
- Building envelope improvements
- Combustion and burner upgrades
- Fuel switching
- Heat recovery and steam traps
- Renewable/DG energy systems

**Water**
- High efficiency water heating systems
- Water conservation systems
- Wastewater recovery and reuse systems
- Alternate, on-site sources of water (A/C condensate, rainwater, RO reject water, foundation drain water, etc.)
- On-site improvements to accommodate reclaimed water use
- Water management systems and controls (indoor and outdoor)
- High efficiency irrigation equipment
WHY TX-PACE?

Lower Utility Costs & Increased Net Operating Income

Conventional

PACE

UTILITY SAVINGS

INCREASED NOI

UTILITY SAVINGS

INCREASED NOI

REPAYMENT

REPAYMENT
<table>
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<tr>
<th><strong>Investment Barrier</strong></th>
<th><strong>TX-PACE Solution</strong></th>
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<tbody>
<tr>
<td>Upfront capital</td>
<td>No upfront capital needed</td>
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<tr>
<td>Short financing term / long ROI</td>
<td>Funded up to life of equipment (20 years+)</td>
</tr>
<tr>
<td>Lack of funding</td>
<td>100% financing – not a personal or business loan</td>
</tr>
<tr>
<td>Landlord / tenant split incentives</td>
<td>Can be passed to tenants</td>
</tr>
<tr>
<td>Short-term ownership</td>
<td>Stays with the land - is transferred upon sale</td>
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FINANCIAL IMPACT OF TX-PACE

- Increases property value with no capital investment by building owner
- Generates positive cash flow immediately

### Example

Efficiency Upgrade: $1.1M  
Savings: $125K/yr

<table>
<thead>
<tr>
<th>Project Cost</th>
<th>$1,100,000</th>
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<tr>
<td>Term</td>
<td>20 Yrs @6%</td>
</tr>
<tr>
<td>Annual Pmt</td>
<td>($95,903)</td>
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<tr>
<td>Avg Annual Savings</td>
<td>$125,000</td>
</tr>
<tr>
<td>NOI Impact</td>
<td>$29,097</td>
</tr>
<tr>
<td>Value Impact (@7.5%)</td>
<td>$296,629</td>
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</table>

![Cumulative Cash Flow Graph](image)
TX-PACE BY THE NUMBERS

MEASURE TYPE
Energy Efficiency: 55% / Water Conservation: 33% / Distributed Gen: 12%

PROPERTY TYPE
- Commercial Retail: 30%
- Hotel: 20%
- Commercial Office: 17%
- Nonprofit: 13%
- Mixed Use: 7%
- Multifamily: 10%
- Industrial: 3%

ANNUAL TX-PACE INVESTMENT
THE GROWING TX-PACE MARKET

- $106 million of investment to date
- 60% of state population covered
LOCAL ADOPTION PROCESS

City/County/Political Subdivision

1) Post Report on how PACE program will work
2) Public briefing/discussion (optional)
3) Pass Resolution of Intent to establish PACE program
4) Public hearing (required)
5) Pass Resolution to Establish PACE program
6) Select administrator
HOW PACE WORKS

A Building Owner:

1. finds a contractor
2. selects a project
3. identifies a capital provider
4. applies to PACE program

If the owner, building, and project all meet PACE requirements:

1. the owner signs a contract with the PACE program, which places a senior lien on the property
2. capital provider signs a contract with the county in exchange for the assessment payments
3. the capital provider supplies funding
4. contractors complete the project
5. the owner sends installment payments directly to the lender
THE PROCESS - PROJECTS

CONTRACTOR

ENERGY ANALYSIS

PROJECT CONSTRUCTION

ITPR

SAVINGS REVIEW

INSTALLATION VERIFICATION
CONGREGATION BETH ISRAEL
Austin / Travis County

**Measures:**
- HVAC
- BAS controls
- Window film

**Utility Incentives:**
$11,000

**Assessment Total:**
$452,105

**Utility Savings:**
20% Annually
Butler Brothers Building - Dallas

Measures:
- HVAC
- Lighting
- Insulation, roof
- Windows
- Plumbing fixtures

Incentives:
- $21 million Historic Tax Credits

Assessment Total:
- $23.9 million

Annual Utility Savings: 40%
- Electric: 6.6 million kWh
- Water: 700K gallons
Redevelopment Example

Before
- $116M
- 9.29% cost of capital

After
- w/$24M PACE loan
- $118M
- 7.46% cost of capital (-20%)
ELGIN GENERAL STORE
Elgin / Bastrop County

Measures:
- Solar PV

Incentives:
USDA: $31,000
Utility: $38,000 (Oncor)

Assessment Total:
$120,000

Utility Savings:
Electric: 26% Annually
Measures:
- HVAC
- LED lighting

Assessment Total: $325,000

Utility Savings: 30% Annually

~75 new, permanent manufacturing jobs
AGAIN...PACE is a WIN-WIN-WIN

- **Property Owners** - lower utility bills, energy independence, energy efficiency, property value increase
- **Contractors** - source of increase in business, more local hiring, best practices, keeping up with technology advancements
- **Lenders** - new loans, steady & stable process, fully collateralized, Tax Assessment lien position, improved asset value
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RESO URC ES

- Texas PACE Authority: [www.texaspaceauthority.com](http://www.texaspaceauthority.com)
- TX-PACE Program Guide and Technical Standards
  [www.texaspaceauthority.org/Documents/Program%20Guide.pdf?dl=0](http://www.texaspaceauthority.org/Documents/Program%20Guide.pdf?dl=0)
- Events and Training
  [www.texaspaceauthority.org/event-directory](http://www.texaspaceauthority.org/event-directory)
- Texas State Energy Conservation Office (SECO)
  [https://comptroller.texas.gov/programs/seco/funding/pace.php](https://comptroller.texas.gov/programs/seco/funding/pace.php)
- PACENation: [https://pacenation.org/](https://pacenation.org/)
- US Department of Energy
  [www.energy.gov/eere/slsc/property-assessed-clean-energy-programs](http://www.energy.gov/eere/slsc/property-assessed-clean-energy-programs)
QUESTIONS?

Dub Taylor
Chief Operating Officer
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www.TexasPACEAuthority.org
LoanSTAR

for
Public K-12 Schools
Local and County Governments
Public Higher Education Universities
State Agencies
NOTICE OF LOAN FUND AVAILABILITY

Maximum loan size per application
$8 million ($3 million min for repaid ARRA)

Loan Payback Requirements
<10 yrs (<15 yrs) / <EUL

Maximum number of loans
three per applicant

Interest Rates
General fund - annual rate of 2 percent
Repaid ARRA fund - annual rate of 1 percent.

Applications
Reviewed on a first-come, first-served basis.

Application Submission
Open enrollment through Aug. 31, 2020 – 2 p.m. CT
General Guide

Eligible Borrowers

- Public taxpayer supported entities
- 10 Texas Gov't Code §2305.032
- 34 Tex. Admin. Code §19.41-45

Loan Qualification Criterion

- Permanently affixed
- Own and Occupy

Third Party Review
Loan Recap

• K-12 schools
  • 144 ($138,350,000)

• Local and County Governments
  • 58 ($149,000,000)

• Hospital Districts
  • 13 ($7,400,000)

• Higher Education
  • 17 ($54,900,000)

• State Agencies
  • 74 ($183,000,000)

306 loans
$532 million

$647 million saved
www.seco.cpa.texas.gov

Funding & Incentives
- SECO Funding Opportunities
- LoanSTAR Revolving Loan Program
- Other Funding Resources

Programs
- Alternative Fuels Program
- Clean Energy Incubators
- Industrial Energy Efficiency
- Innovative Energy Demonstration Program
- Local Governments Program
- Schools Program
- State Agency and Higher Ed. Program
- Pantex Program
- Watt Watchers

Energy Codes
- Training & Code Compliance
- Energy Code Adoption Process
- Code Contacts
- Commercial & Multi-Family Construction
- Single-Family Construction
- State-Funded Buildings
- Local Ordinances
- Texas Water Conservation Standards

Energy Reporting
- State Agencies and Institutions of Higher Ed.
- Local Government
- Utilities
- Schools

Resources
- Combined Heat and Power in Texas
- Energy Efficiency Best Practices Guide
- Energy Savings Performance Contracting
- Remote Energy Audits

About Us
- Contact Us
- Contract Portal
- Sign up to receive updates
SECO Funding Opportunities
https://comptroller.texas.gov/programs/seco/funding/

Programs
SECO

SECO FUNDING OPPORTUNITIES

Throughout the year, SECO announces various funding opportunities to support efficiency programs. Funding opportunities include Notice of Loan Fund Availability for the LoanSTAR program, Request for Applications for energy efficiency grants and Requests for Proposals for qualified firms to contract with SECO on projects.

Notice of Loan Fund Availability — LoanSTAR Program

Posted Oct. 18, 2019 — The Texas LoanSTAR (Saving Taxes and Resources) revolving loan program provides low interest rate loans to assist Texas public institutions by financing their energy-related cost-reduction retrofit projects.

Open enrollment through August 31, 2020

Sign up to receive notifications from SECO when new funding opportunities become available.
Loanstar Process

Application

Utility Assessment Report

Third Party Review

Loan Agreement

140 calendar days to complete

Design

Third Party Review

50%, 100%

Retrofit Activities

Third Party Review (Site Visit)

50%, 100%

Loan Repayment Schedule

Reimbursement
LOANSTAR TECHNICAL GUIDELINES

The LoanSTAR Program requires that a detailed Energy Assessment Report be prepared according to the following LoanSTAR Technical Guidelines.

LoanSTAR Guidebook, Volume I (Word)

Volume I provides a road map for engineers preparing Energy Assessment Reports for the LoanSTAR Program. It identifies policies to be followed for project calculations and outlines the required format for presenting the projects to SECO for technical evaluation.

LoanSTAR Guidebook, Volume II (Word)

Volume II provides simplified calculation methods for many common energy savings measures. These calculation methods are reduced to look-up and fill-in-the-blank procedures and are provided as an aid for analysts.
Utility Assessment Report (UAR)

TYPES OF PROJECTS FUNDED:

* Energy Efficient Lighting
* High Efficiency HVAC
* Energy & Water Efficiency Management Systems
* Energy Recovery Systems
* Building Shell Improvements
* Load Management Measures
* Energy Management Information Systems and Metering
* Whole Building & Systems Commissioning
* Electric Demand Reduction
* Power Factor Correction
* Load Shifting (eg, TES)
WHO CAN DEVELOP A UAR?
A Professional Engineer licensed in the State of Texas with knowledge and experience with mechanical, electrical and building envelope systems found in institutional and commercial facilities; knowledge and experience in energy efficiency retrofits; understanding of building and operations procedures; knowledge and experience in conducting energy analyses and preparing comprehensive reports on the findings.

WHAT CONTRACTING MECHANISMS CAN BE USED?
- Design/Bid/Build
- Design/Build
- Energy Saving Performance Contracts (ESPC)

CAN WE APPLY FOR A LOANSTAR LOAN ON PROJECTS ALREADY STARTED OR CONSTRUCTED?
No expense paid prior to obtaining final loan agreement signatures for both parties will be reimbursed except the fee paid for completion of the UAR.

NOTE: All project expenses are to be included in the itemized cost estimates required by UAR submission.
Utility Assessment Report (UAR)

**RECENT REVISIONS:**

**Texas Historical Society (THC)**

If the structure is 45 years old or older, listed or eligible for listing in National Register for Historic Places, located in National Register Historic District, or is in a locally designated Historic District, borrower must consult with THC regarding review of 36CFR §800.5 to determine the potential for damage caused by LoanSTAR funded projects.
Eddy Trevino, Director     512-463-1876
eddy.trevino@cpa.texas.gov

www.seco.cpa.texas.gov
QUESTIONS

MATT LOMBARDO
SALES DEVELOPMENT MANAGER
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JOIN US IN JULY

UPCOMING
JULY 2020

Procurement Options to Support Energy Reduction

Workshops and Training Opportunities

On the calendar below you can find events, workshops, seminars, webinars, and training opportunities in the North Texas region related to water, energy, and transportation. You can add events to your own calendar, or subscribe to the entire calendar to have it next to your own calendar.

Upcoming Events

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Details</th>
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Past Events and Event Documents

Facility Retrofits to Reduce Overall Energy and Water Consumption

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Matt Lombardo is a representative from the Energy Services Coalition Texas Chapter. He has 10+ years of experience in the Guaranteed Energy Savings Performance Contracting Industry and continues to work in it as a Sales Team Manager for Schneider Electric. He has wide ranging experience in the industry having held different roles in both early project development and in assuring ongoing project performance during the guarantee period. Matt holds an MBA from the University of Texas at Dallas. He and his wife Melanie reside in Celina, TX with their two wonderful little children.

Lisa Tames is a Senior Vice President and Senior Leasing Sales Specialist in Bank of America’s Global Leasing Energy Services Group. She focuses on the origination and structuring of energy-related financings in the Central and Rocky Mountain States and has originated over $200 million in transactions for borrowers in the government, NFP, healthcare and general industry sectors, as well as with ESCOs and energy equipment manufacturers and utilities. Prior to joining Bank of America, Lisa was a credit underwriter and originator in the Healthcare and Energy/ Government Group at CitCap. Lisa has over 30 years of experience in banking and finance at large financial institutions. She holds a B.S. in Business.

Dub Taylor joins Texas PACE Authority as chief operating officer after 20 years as the director of the Texas State Energy Conservation Office (SECO). Under his leadership, SECO helped the state make the most of domestic energy, reduce state and local government energy costs and promote cost-effective clean energy technologies. This work included overseeing engineering technical assistance across Texas and growing the LoanSTAR (Loans to Save Taxes And Resources) financing program to over $200 million, with SECO originating and servicing hundreds of loans to public entities while maintaining a zero default rate.

Prior to SECO, Taylor’s public sector experience includes six years with the Texas Railroad Commission’s Alternative Fuels Research and Education Division. Taylor’s private sector experience was focused in commercial real estate, property appraisal and property tax consulting. He is a native of Dallas and graduate of the University of Texas at Austin.

Eddy Trevino is the Director of the Texas State Energy Conservation Office (SECO). In addition to his daily management and oversight activities, he oversees the State Energy Program activities, the LoanSTAR revolving loan program, and the Clean Energy Incubator initiative.

Under Mr. Trevino’s management of the LoanSTAR revolving loan program, fund value has increased to $230 million with over 325 loans. There have been no loan defaults over the life of the loan program.

Between September 1, 2018 and July 31, 2019, the Clean Energy Incubator program activities resulted in an economic impact of $28,435,933 to the state of Texas.

Mr. Trevino’s professional designations include a registered Professional Engineer and a Certified Energy Manager. He has 29 years of engineering and management experience.

While attending the University of Texas at Austin, Mr. Trevino earned the following degrees: Bachelor in Architectural Engineering (1980), an MBA (1986), and a Master in Technology Commercialization (2001).