

# POWER<sup>with</sup> PURPOSE

## Community Choice Energy



THE BUSINESS OF  
LOCAL ENERGY  
SYMPOSIUM

June 5, 2018  
Sacramento

Organizing partners:





# THE BUSINESS OF LOCAL ENERGY SYMPOSIUM

## FEATURED SPEAKERS



**Dr. Dan Kammen** is a Distinguished Professor of Energy at the University of California, Berkeley, with appointments in the Energy and Resources Group, the Goldman School of Public Policy, and the department of Nuclear Engineering. His research combines environmental science, risk analysis, design and development of clean energy technologies and systems, and economic and policy analysis of science, technology, and energy futures. He has authored or co-authored 12 books, written more than 300 peer-reviewed journal publications, testified more than 40 times to U.S. state and federal congressional briefings, and has provided various governments with more than 50 technical reports. He is a frequent contributor in international news media, including Newsweek, Time, The New York Times, The Guardian, and The Financial Times.



**David Hochschild** was appointed to the California Energy Commission in 2013. In 2001 he was a Special Assistant to San Francisco's Mayor and launched a city-wide \$100 million initiative to put solar on public buildings. He also co-founded the Vote Solar Initiative, a 60,000-member advocacy organization promoting solar policies. He served as executive director of a national consortium of leading solar manufacturers and worked for five years at Solaria, a solar company in Silicon Valley. In 2007-2008, he served as a commissioner at the San Francisco Public Utilities Commission. Commissioner Hochschild has been awarded the Sierra Club's Trailblazer Award, the American Lung Association's Clean Air Hero Award, and the Department of Energy's Million Solar Roof True Champion Award. He has a Master of Public Policy degree from Harvard's Kennedy School of Government.



**Martha Guzman Aceves** was appointed Commissioner at the CPUC by Governor Edmund G. Brown Jr. in December of 2016. She previously served as deputy legislative affairs secretary in the Office of the Governor starting in 2011, focusing on natural resources, environmental protection, energy and food, and agriculture. She was sustainable communities program director for the California Rural Legal Assistance Foundation from 2005 to 2011. In 2010 she co-founded Communities for a New California, a charitable organization promoting increased civic engagement of underrepresented communities. Guzman Aceves has a Master of Science degree in agricultural and resource economics from the University of California, Davis.



**Autumnn Burke** represents the 62nd District in the California State Assembly. She has authored bills establishing Transformative Climate Communities to help neighborhoods heavily impacted by pollution and create greater accountability and transparency across all levels of government, among other things. Assemblywoman Burke also secured \$900 million in funding for career technical education programs. She authored AB 151, which would strengthen California's 'Cap and Trade' program to continue reducing greenhouse gas emissions. Burke has also introduced legislation to expand the electric vehicle charging network by installing new car charging in public places. She is the chair of the Assembly Select Committee on Career Technical Education and Building a 21st Century Workforce, and a member of the Assembly Committees on Accountability and Administrative Review, Banking and Finance, Health, Revenue and Taxation, Utilities and Energy, and the Joint Legislative Committee on Climate Change Policies.



**Mark Ferron** has served on the California Independent System Operator Corporation Board of Governors since 2015. He served as a member of the California Public Utilities Commission from 2011 to 2014. He has 25 years of experience in global finance, banking and operations, including being a partner at the Silicon Valley Social Venture Fund from 2010 to 2014 and several positions at Deutsche Bank from 1996 to 2009, including that of managing director and chief operating officer. He is an advocate for clean energy and clean transportation, on the Board of Trustees of the Rocky Mountain Institute and on the Public Policy Board of Veloz.org.



**Angelina Galiteva** has served two terms on the California Independent System Operator Corporation Board of Governors. Angelina is currently President for NEOptions, Inc., a renewable energy and new technology product design and project development firm. Her industry experience includes serving as Executive Director of the Los Angeles Department of Water and Power and head of its Green LA, Environmental Affairs and New Product Development Organization. She graduated from Pace University School of Law with a Juris Doctor degree in 1993 and an LL.M. degree in 1994 in Environmental and Energy Law.

# Welcome and thank you for participating

## FEATURED SPEAKERS



**Dawn Weisz** is the CEO for MCE Clean Energy and she coordinated efforts to explore, develop and launch MCE as the first Community Choice Aggregation program in California. Dawn has 20 years of experience developing and managing renewable energy and energy

efficiency programs and projects while working for leading public agencies in the field. Previously, she was a Principal with the County of Marin, where she managed energy and sustainability initiatives and served as the Executive Director for Sustainable North Bay. Dawn has also received awards from the US Environmental Protection Agency, the US Department of Energy, and the Power Association of Northern California.



**Geof Syphers** is the Chief Executive Officer of Sonoma Clean Power. He has nearly two decades of experience developing and managing renewable energy and energy efficiency programs, and has been a consultant to utilities, public agencies, and businesses. A licensed mechanical

engineer and a pioneer in the green building field, Geof managed utility energy efficiency programs and consulted on over \$1 billion in completed California developments. Geof was formerly Chief Sustainability Officer for Coddling Enterprises and the founding Director of Sustainable Buildings and Communities at KEMA Energy & Sustainability (now DNV-GL). He has a master's degree in energy engineering from the University of Massachusetts, and his projects have earned top awards, including the Governor's Environmental and Economic Leadership Award, LEED Platinum, and the first One Planet Communities certification in the United States.



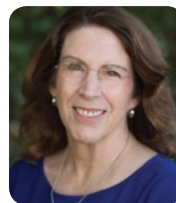
**Barbara Hale** is the Assistant General Manager responsible for the San Francisco Public Utilities Commission Power functions. That includes San Francisco's Municipal Power Utility, serving 3,000 accounts with a peak demand of 150 MW, and CleanPowerSF, San Francisco's Community Choice program, serving

about 80,000 accounts with a peak demand of 100 MW. Prior to her employment with the San Francisco Public Utilities Commission, Barbara worked for the State of California Public Utilities Commission in progressively responsible positions, including Advisor to President, Administrative Law Judge, and Director of Strategic Planning.



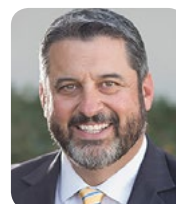
**Ted Bardacke** is the Executive Director at Clean Power Alliance and the former Director of Infrastructure for the Office of the L.A. Mayor. From three initial member agencies at its July 2017 launch, the Alliance has grown to include 31 cities in Los Angeles and Ventura

Counties representing over 2.4 million residents, with more lined up to join. In all, the Clean Power Alliance will expect to have more than 1 million residential accounts and a quarter million commercial accounts by end of the year, and will help to decrease greenhouse gas emissions by up to 9% across the region.



**Jan Pepper**, the Chief Executive Officer of Peninsula Clean Energy, has over 30 years of energy and utility experience and was the founder of four energy-related start-ups. Jan has served on the Los Altos city council and as Mayor of Los Altos. Jan also served on

the Board of Directors of the Bay Area Air Quality Management District from 2013 to 2017. She has a BS in civil engineering and an MBA, both from Stanford University, and is a registered professional engineer in California. At APX, she developed and pioneered the first use of renewable energy credits, which are now the standard currency for trading and tracking renewable power. At Clean Power Markets, her company designed and implemented the successful Solar Renewable Energy Credit (SREC) program for the State of New Jersey.



**Jason Caudle** became Lancaster's Deputy City Manager in 2008. He has been integral in developing and implementing multi-scaled sustainable energy projects, as well as Lancaster's award-winning downtown district, "The BLVD." Jason has overseen formation of the Lancaster

Power Authority, California Clean Energy Authority, and Lancaster Choice Energy - the City's Community Choice Aggregate. Previously, he was Vice President of Public Finance for Kinsell, Newcomb & De Dios, as well as City Manager of Tehachapi. Jason holds a bachelor's degree in Political Science and master's degree in Public Policy and Administration, both from California State University Bakersfield.

## FEATURED SPEAKERS



**Benjamin Cárdenas** is a seasoned public servant with over a decade of Congressional work experience both in the Los Angeles region and Washington DC. He served as District Director for U.S. Representative Grace F. Napolitano representing the 32nd Congressional District. Benjamin proudly serves on the Board of Education for the Montebello Unified School District representing over 30,000 K-12 and Adult-Education students combined and overseeing an operating budget of nearly \$300M. He is the Co-Founder and current president of the East Los Angeles Residents Association (ELARA), Co-Founder and Member of the CHCI Alumni Association-Los Angeles Chapter and past president and member of the Eastmont Community Center Board of Directors. Benjamin currently serves as the Assistant City Manager for the City of Pico Rivera.



**Jeff Byron** has 40 years of experience in emerging energy technologies, customer requirements, and energy policy. He serves on advisory boards for a number of companies and is a member of Silicon Valley's oldest seed funding organization. He was a 2015 Stanford Distinguished Careers Institute Fellow and a commissioner at the California Energy Commission. He has served on non-profit boards providing services for the developmentally disabled and a clean technology business accelerator.



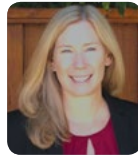
**Amaris Lujano** is a Solar Installation Supervisor at GRID Alternatives. She is a graduate of Future Build, a pre-apprenticeship program in construction trades and solar energy, and graduated valedictorian of her class as one of only two women in the program. Soon after Amaris became the construction warehouse intern at GRID Alternatives and then was hired on as a Solar Installation Supervisor. Last year she was one of two women selected to attend the C3E Symposium where GRID Alternatives' VP of Construction won an award at MIT. She is currently continuing her education in Electrical Engineering.



**Jennifer Kropke** graduated from UCLA's School of Law. She began her legal career at a large, multinational firm in Manhattan before switching to public interest law. Jennifer then became an attorney for the City of New York, litigating child welfare abuse and neglect cases. Jennifer moved back to California and opened her own law firm representing children with learning and other disabilities. She now works as the Director of Workforce and Environmental Engagement at the International Brotherhood of Electrical Workers and is focused on economic and workforce development that pays family-sustaining wages in the renewable energy arena, including CCA.



**Denise Fairchild** is the inaugural President of Emerald Cities Collaborative (ECC), a national nonprofit organization based in Washington DC, with affiliates in major urban centers across the United States. She is charged with advancing ECC's "high-road" mission to green our cities, build resilient local economies and ensure equity inclusion in both the process and outcomes of a new green and healthy economy.



**Beth Vaughan** is executive director of the trade association representing Community Choice Aggregators (CCAs). CalCCA advocates for community choice at the legislature and in regulatory forums, and develops best practices to support the expanding number of local governments forming CCAs. Beth has experience in public policy, strategic planning, project management, public relations and information technology. She has consulted with government agencies, non-profits, and private sector interests on energy and environmental public policy issues. Beth also served five years in the New Zealand parliament as senior advisor to the Environment and Conservation Cabinet Ministers.



The mission of the Center for Climate Protection is to inspire, align, and mobilize action in response to the climate crisis. We work with business, government, youth, and the broader community to advance practical, science-based solutions for significant greenhouse gas emission reductions.  
[www.climateprotection.org](http://www.climateprotection.org)



For over 35 years, LGC has connected cutting-edge leaders from across the nation. Together we are advancing transformative policies and implementing innovative solutions for sustainable communities. LGC supports local policymakers through nationally recognized events, low-cost technical assistance, and policy guidance on climate change, energy, water and community design.  
[www.lgc.org](http://www.lgc.org)



The Local Government Sustainable Energy Coalition (LGSEC) enhances the role of local governments in California's sustainable energy future by providing a strong collective voice for its city, county, and local agency members on sustainable energy policy decision-making in key regulatory agency proceedings. LGSEC has been involved with supporting Community Choice Aggregation since 2007.  
[www.lgsec.org](http://www.lgsec.org)

# LOOK HOW THE MOVEMENT HAS GROWN!

2010



2014



2015



2016



2017



2018



**Community Choice Agencies Launch**



Photos: MCE launch, Sonoma Clean Power goes live, Lancaster Choice Energy breaks ground, and City of San Jose votes for CCA

## AGENDA



8:00 - 9:00 am

### REGISTRATION AND BREAKFAST

Foyer

*Underwritten by Calpine Energy Solutions*

9:00 - 9:10

### INTRODUCTION

Grand Nave Ballroom

**Ann Hancock**

Executive Director, Center for Climate Protection

9:10 - 9:15

### WELCOME TO SACRAMENTO

Grand Nave Ballroom

**Steve Fleming**

Chief Executive Officer, River City Bank

9:15 - 9:30

### THINK BIG - WHAT WE ARE HERE FOR?

**Geof Syphers**

Chief Executive Officer, Sonoma Clean Power

9:30 - 10:45

### KEYNOTE PANEL: REGULATORY AND LEGISLATIVE CHALLENGES AND THE DYNAMIC CALIFORNIA ENERGY MARKET

*Introduction by Josh Brock, Manager CCA Account Services*

*Underwritten by Constellation*

**Jeff Byron (Moderator)**

Former Commissioner, California Energy Commission

**Autumn Burke**

Assemblymember 62nd District, California State Assembly

**David Hochschild**

Commissioner, California Energy Commission

**Dawn Weisz**

Chief Executive Officer, MCE

**Mark Ferron**

Member, Board of Governors, California Independent System Operator

**Martha Guzman Aceves**

Commissioner, California Public Utilities Commission

10:45 - 11:10

### NETWORKING BREAK

11:10 - 12:10

### BREAKOUT PANELS

#### FORMING CCAs: WHAT YOU NEED TO KNOW

*Location: Carr*

*Underwritten by River City Bank*

#### DIFFERENT BUSINESS & GOVERNANCE MODELS FOR CCAs

*Location: Bataglieri*

#### EMERGING OPPORTUNITIES IN CALIFORNIA

*Location: Tofanelli*

*Underwritten by NextEra Energy*

#### PROGRAMS: OPPORTUNITIES FOR INNOVATION

*Location: Bondi*

*Underwritten by Sonoma County Water Agency*

#### ELECTRIFY EVERYTHING: CCAs' ROLE IN FUEL SWITCHING

*Location: Gardenia*

12:10 - 12:25

### NETWORKING BREAK

Foyer

12:25 - 12:55

### LUNCH

Grand Nave Ballroom

*Underwritten by Peninsula Clean Energy*

12:55 - 1:35

#### KEYNOTE ADDRESS: ENERGY MARKET TRENDS AND THE FUTURE OF CCAs

Grand Nave Ballroom

*Introduction by Geof Syphers, CEO, Sonoma Clean Power*

**Dr. Dan Kammen**

Director of Renewable and Appropriate Energy Laboratory, UC Berkeley

1:35 - 1:45

## HONORING EMERGING CCAs

*Grand Nave Ballroom*

### Woody Hastings

Energy Program Manager, Clean Power Exchange, Center for Climate Protection

1:45 - 2:00

## NETWORKING BREAK

*Foyer*

2:00 - 3:00

## BREAKOUT PANELS

### BIG DATA MANAGEMENT: UNLOCKING THE FUTURE OF DER

*Location: Tofanelli*

*Underwritten by Sacramento Municipal Utility District*

### FINANCING: FROM START-UP TO PROGRAM FINANCING

*Location: Bondi*

### LEGISLATIVE AND REGULATORY OPPORTUNITIES AND CHALLENGES

*Location: Gardenia*

*Underwritten by Braun Blaising Smith Wynne P.C.*

### KEEPING THE COMMUNITY VOICE IN COMMUNITY CHOICE

*Location: Bataglieri*

### CENTRAL VALLEY PERSPECTIVES ON COMMUNITY CHOICE

*Location: Carr*

3:00 - 3:25

## NETWORKING BREAK

*Foyer*

3:25 - 4:10

### PLENARY PANEL: ENERGY DEMOCRACY: FOSTERING EFFECTIVE COMMUNITY ENGAGEMENT

*Ballroom*

*Introduction by Ted Bardacke, CEO, Clean Power Alliance of Southern California*

### Angelina Galiteva (Moderator)

Board Member, California Independent System Operator

### Amaris Lujano

Solar Installation Supervisor, GRID Alternatives

### Denise Fairchild, PhD

President and CEO, Emerald Cities Collaborative

### Jennifer Kropke

Director of Workforce & Environmental Engagement, International Brotherhood of Electrical Workers

4:10 - 5:15

### PLENARY PANEL: COMMUNITY CHOICE LEADERS SPEAK OUT

*Grand Nave Ballroom*

*Introduction by Robert Pierce, Director, Energy Marketing, Shell Energy North America*  
*Underwritten by Direct Energy*

### Beth Vaughan (Moderator)

Executive Director, California Community Choice Association

### Barbara Hale

Assistant General Manager, CleanPower SF

### Benjamin Cardenas

Assistant City Manager, City of Pico Rivera

### Geof Syphers

Chief Executive Officer, Sonoma Clean Power

### Jan Pepper

Chief Executive Officer, Peninsula Clean Energy

### Jason Caudle

Deputy City Manager, City of Lancaster

### Ted Bardacke

Executive Director, Clean Power Alliance

5:15 - 5:20

## CLOSING REMARKS

*Grand Nave Ballroom*

5:20 - 6:30

## NETWORKING RECEPTION

*Glide event space*

*Underwritten by EES Consulting*

*See map on page 23 for room locations.*



**MORNING  
BREAKOUT  
PANELS  
11:10am - 12:10pm**

**Forming CCAs: What You  
Need to Know**

*Location: Carr*

Experienced professionals describe the issues that community leaders need to be aware of as they assess the benefits of starting a Community Choice program. Issues covered will include: key steps in the process, community outreach and education, technical studies, governance, risk assessment, building political support and staff capacity, financing, and structuring energy portfolios and rates based on community priorities.

PANELISTS:

Moderator: **Jeff Fuller**, Director, Client Services, The Energy Authority

**Gary Saleba**, President & CEO, EES Consulting

**Jenine Windeshausen**, Executive Director, Pioneer Community Energy

**Shawn Marshall**, Founder, CEO, Local Energy Aggregation Network

**Different Business &  
Governance Models for  
CCAs**

*Location: Bataglieri*

CCA's come in all shapes and sizes. Hear about three different approaches to CCA development, governance, business models, and operational structure and what they mean for customers and communities. Panelists will also discuss their approach to opportunities and challenges presented by distributed energy resources and an evolving regulatory regime.

PANELISTS:

Moderator: **Howard Choy**, Owner, Howard Choy Consulting

**Jason Caudle**, Deputy City Manager, City of Lancaster

**Matthew Marshall**, CEO, Redwood Coast Energy Authority

**Nick Chaset**, CEO, East Bay Community Energy





## Emerging Opportunities in California

*Location: Tofanelli*

Energy industry experts provide their perspective on what is happening in California's energy markets, focusing on what CCA leaders need to know, including new opportunities that require planning ahead. Speakers will discuss CCA business models, changes in utility-scale renewable development, community microgrids, distributed resources, and the roles of CCAs, MUNIs and the IOUs. They will discuss how the parts fit together on an evolving grid and the resources CCAs will need to take advantage of emerging opportunities.

### PANELISTS:

Moderator: **Margaret Bruce**, Program Manager, Local Government Commission

**Greg Thomson**, Director of the Community Microgrid Initiative, Clean Coalition

**Samuel Golding**, President, Community Choice Partners

**Mike Arndt**, Managing Director of Development, Recurrent Energy

**Michael Champ**, Manager of Finance and Analytics, Community Energy Services team, Sacramento Municipal Utility District

## Programs: Opportunities for Innovation

*Location: Bondi*

Professionals with hands-on experience working on programs for the three longest operating CCAs — MCE Clean Energy, Sonoma Clean Power, and Lancaster Choice Energy — will highlight programs that have produced measurable results. Panelists will dive deeper into how new and emerging programs can serve as powerful tools for innovation at the local level. Specific programs discussed will include energy efficiency, demand response, electric vehicle advancement, feed-in tariffs, and other distributed energy resource programs.

### PANELISTS:

Moderator: **Woody Hastings**, Renewable Energy Manager, Center for Climate Protection

**Kathy Wells**, Energy Projects Coordinator, Lancaster Choice Energy

**Nelson Lomeli**, Program Specialist, Sonoma Clean Power

**Meaghan Doran**, Manager of Customer Programs Operations, MCE

## Electrify Everything: CCAs' Role in Fuel Switching

*Location: Gardenia*

To reduce greenhouse gas emissions at the speed and scale that the science tells us is required means we must decarbonize the transportation and building sectors. Industry experts will discuss the roles that CCAs can play in fuel switching and how this fits in with their overall strategy. Panelists will give a broad overview of the building and transportation sectors from a climate perspective and cover specific technologies, including storage, electric vehicle charging, heat pumps, and electric hot water heating.

### PANELISTS:

Moderator: **Rick Brown**, President and Board Chairman, TerraVerde Energy

**Alice Stover**, Manager of Customer Programs, Policy and Planning, MCE

**Janice Lin**, Founder and CEO, Strategen Consulting

**Richard Schorske**, Executive Director, ZNE Alliance / EV Alliance

**Panama Bartholomy**, Director, Building Decarbonization Coalition



**AFTERNOON  
BREAKOUT  
PANELS  
2:00 - 3:00pm**

**Big Data Management:  
Unlocking the Future of  
DER**

*Location: Tofanelli*

What role does the analysis of big data play in optimizing the deployment of distributed energy resources (DER)? Industry experts will discuss using this tool for power procurement and DER planning, and for rate design that targets DER deployment to maximize locational value. They will also cover how data analytics together with DERs can help with CCA issues like more accurate load forecasting and wholesale settlement, customer marketing, engagement, and education – helping customers manage the transition to time of use rates – and reducing demand charges for C&I customers.

**PANELISTS:**

Moderator: **Laura Manz**,  
Director, Navigant

**Ali Chehrehbaz**, Co-Founder  
& EVP Operations, TerraVerde  
Energy

**Chris Sentieri**, Climate  
Solutions Manager, Blue Strike  
Environmental

**Scott Engstrom**, VP of  
Corporate Strategy & Business  
Development, GridX

**Tony Choi**, CCA Services  
Director, Calpine Energy  
Solutions

**Financing: From Start-up to  
Program Financing**

*Location: Bondi*

Hear from financial professionals who understand the unique positions of CCAs in the market. Learn how millions of dollars in working capital financing was obtained for currently operating CCAs. The panel will also discuss the real obstacles that CCAs face with program and project financing and how to overcome them.

**PANELISTS:**

Moderator: **Tom Habashi**, CEO,  
Monterey Bay Community  
Power

**Lee Feliciano**, Director,  
Business Development, C2  
Energy Capital

**Russ Branson**, Director, Public  
Financial Management

**Steve Fleming**, President and  
Chief Executive Officer, River  
City Bank



## Legislative and Regulatory Opportunities and Challenges

*Location: Gardena*

The energy sector is in a process of profound transformation. The legislative and regulatory arenas are two key places where we are navigating the path to a new decentralized clean energy economy. Join top experts who spend their days in Sacramento and at the California Public Utilities Commission to explore how Community Choice is impacted by and is impacting policy decision-making.

### PANELISTS:

Moderator: **Greg Bass**,  
Regulatory Director, Calpine  
Energy Solutions

**Emily Pappas**, Partner, Niemela  
Pappas & Associates

**Neal Reardon**, Regulatory  
Affairs Manager, Sonoma Clean  
Power

**Scott Blaising**, Attorney, Braun  
Blaising Smith Wynne, P.C.

## Keeping the Community Voice in Community Choice

*Location: Bataglieri*

Community advocates have propelled Community Choice to the forefront of the transition underway in California's electricity system. That's because Community Choice offers a powerful way to advance local clean energy for environmental, economic, and social justice benefits to our communities. Learn from this California Alliance for Community Energy session how to realize community benefits through a strong community voice in Community Choice governance, best practices, and policy advocacy.

### PANELISTS:

Moderator: **Erika Morgan**,  
Operations Coordinator,  
California Alliance for  
Community Energy

**Betony Jones**, Principal, Fourth  
Sector Strategies

**Anne Olivia Eldred**, Chair,  
Community Advisory  
Committee, East Bay  
Community Energy

**Eric Veium**, Director, SLO Clean  
Energy

## Central Valley Perspectives on Community Choice

*Location: Carr*

California's Central Valley has a wealth of diverse energy resources, human resources, and suitable sites such as parking lots and rooftops needed to build renewable energy generation. Local control of energy dollars may offer the best solution to boost the local economy, increase employment, and achieve environmental goals, while offering competitive rates. Long-time public policy experts who live and work in the Central Valley will offer their perspectives on how Community Choice might benefit Central Valley communities.

### PANELISTS:

Moderator: **Kate Meis**,  
Executive Director, Local  
Government Commission

**Joseph Oldham**, Director,  
San Joaquin Valley Clean  
Transportation Center

**Jose Gonzalez**, Sustainability  
Manager, City of Fresno  
(retired)

**Mike Dozier**, Executive  
Director, CA Partnership for the  
San Joaquin Valley (retired)

## SPEAKER PROFILES



**Mike Arndt** is Managing Director of Development for Recurrent Energy, overseeing the company's renewable energy project development activities across the U.S. With over 13 years of experience in renewable energy, particularly in solar, wind and energy storage project development, Mike has developed over 1,500 MW of energy projects that are either operating or under construction, with an investment of over \$3 billion.



**Panama Bartholomy** is the Director of the Investor Confidence Project, where he works to unlock capital markets for energy efficiency project development and the Director of the Building Decarbonization Coalition, a multi-sector forum advocating for and creating solutions to our pollution-intensive building stock. He used to work for the Legislature, Energy Commission, State Architect, and California Conservation Corps.



**Greg Bass** has more than 25 years of experience in the energy business. Currently he is providing regulatory and legislative policy direction for Calpine Solutions' Western retail operations. Previous responsibilities at Calpine have included business operations and development and strategic plan implementation. Greg's professional background includes regulatory and legislative strategy and policy, regulatory compliance, business negotiation, expert witness, and sponsor of testimony before commissions and legislative committees. Greg also worked for Southern California Edison, as well as PacifiCorp where he testified before the Oregon Public Utilities Commission and the Wyoming Public Service Commission.



**Scott Blaising** is a principal with Braun Blaising Smith Wynne, P.C., having joined BBSW after working for the Sacramento Municipal Utility District and Southern California Edison. Scott manages a group within BBSW that provides legal services to Community Choice Aggregation programs and municipal utilities. Scott also serves as regulatory counsel on certain matters for the California Community Choice Association.



**Russ Branson** is a Director for Public Financial Management (PFM). Prior to joining PFM, Russ spent 13 years with the City of Roseville, California in financial leadership positions, including Assistant City Manager and Treasurer, overseeing Finance and Administrative Services. Prior to that Russ was a principal with an urban economics consultancy, where he spent more than a decade providing clients with services including impact fee studies, infrastructure financing plans, and the establishment of special taxing districts. He has also been active in several boards related to public finance, and teaches at UC Davis Extension on the financial aspects of planning. In 2013 he received the award of excellence in public finance by the California Public Securities Association.



**Rick Brown**, PhD launched TerraVerde, an energy and solar advisory firm, in 2009. Over the past seven years the TerraVerde team has developed \$390 million of distributed energy resources (DER), including 80 MWs of solar, 13 MWs storage and energy conservation measures in over 300 buildings on behalf of schools, cities, transit agencies and water districts. Using these assets, TerraVerde is now developing programs that will create new revenue streams and reduce power and resource adequacy costs for Load Serving Entities through deployment of DER/non-wire strategies.



**Margaret Bruce** is the Program Manager for the Local Government Commission's Local Government Sustainable Energy Coalition. Margaret also has her own energy and sustainability consulting practice and serves on the San Lorenzo Valley Water District Board. Margaret's career encompasses environmental, energy and sustainability fields, from start-up to program management in non-profits, federal and state government and the private sector.



**Michael Champ** is Manager of Finance and Analytics for the Community Energy Services team at Sacramento Municipal Utility District (SMUD). He leads several of SMUD's service offerings for CCE clients, including rate analysis and design, financial modeling, and analytics. He developed a flexible billing system to accommodate diverse rates and policies, and SQMD calculations that use local load shapes to drive accurate wholesale prices.

## SPEAKER PROFILES



**Nick Chaset** is the CEO of East Bay Community Energy (EBCE), a new Community Choice Energy agency formed to serve 600,000 customer accounts and over 6,000 GWh annually across Alameda County. He most recently served as the Chief of Staff to CPUC Commissioner Michael Picker, and as Special Advisor for Distributed Energy Resources for Governor Jerry Brown.



**Ali Chehrehbaz** is the Executive Vice President of Engineering and a co-founder at TerraVerde Energy. Ali is responsible for identifying and modeling distributed energy resource opportunities, developing and implementing projects, and managing solar and storage assets. Ali has over 12 years of experience in engineering, software, and energy project development. Prior to TerraVerde, he designed and developed utility-scale solar projects at Tessera Solar and oil sands upgrading plants at Petro-Canada. Ali holds a BS degree in Mechanical Engineering from the University of Calgary.



**Tony Choi** has 25 years of experience in the California wholesale energy markets, including roles at PG&E and SDG&E. He joined Calpine Energy Solutions as Director of CCA Business Solutions in March of 2016 to help meet the growth and evolving needs of clients. Tony is focused on developing business solutions that combine technology and Calpine Solutions' energy experience to maximize the value of the services they deliver to CCA clients.



**Howard Choy** retired as General Manager of the Office of Sustainability, County of Los Angeles last year and in his new role as business owner he works with clients in advocating and developing roles and opportunities for public agencies under California's clean energy economy.



**Meaghan Doran** entered the world of energy efficiency with Marin City Community Development Corporation, a workforce development agency, where she managed the Direct Install team and conducted outreach for MCE's Multifamily Energy Savings program. As MCE's Manager of Customer Programs Operations, Meaghan oversees program implementation, MCE's Single Point of Contact model (SPOC), workforce development initiatives, and strategic partnerships.



**Mike Dozier** is the owner and principal consultant of Mike Dozier Consulting, specializing in Economic Development, Business Development and Job Creation. Mr. Dozier served as the Executive Director of the Office of Community and Economic Development (OCED) at Fresno State (January 2009 to July 2017), and as Director of Community and Economic Development with the City of Clovis, California (April 1992 to January 2009).



**Anne Olivia Eldred** is Chair of the Community Advisory Committee for East Bay Community Energy and ex-officio Member of the Board, a Community Organizer with California Nurses Association / National Nurses United, a Delegate to the Alameda Labor Council, and Elected Council to the Interfaith Council of Alameda County. Anne Olivia attended Portland State University and was a Public Policy and International Affairs Fellow at Carnegie Mellon.



**Scott Engstrom** leads GridX's corporate strategy and business development efforts. Prior to GridX, Scott was an industry analyst, investor, and portfolio manager focused on the utility and energy industry. Over the past 15 years, Scott developed extensive relationships with utilities' financial leadership and unique insight into utility operations, regulatory environments, and the transformation to smart grid.



**Lee Feliciano** is Director of Business Development for C2 Energy Capital, a private equity firm investing in C&I, Community Solar and Utility Scale projects with over 85 operating assets across the US. Prior to C2, he was Director of Project Development for ReneSola Power Holdings and Senior Developer at Kyocera Solar. He was responsible for the first behind-the-meter PPA in Arizona.



**Steve Fleming** has been President & Chief Executive Officer of River City Bank since September 2008. Under his leadership the Bank has more than doubled in size from \$800 million to \$1.8 billion in total assets and is now the largest and most profitable bank based in Sacramento. He has over 35 years of banking experience, including over 20 years with Bank of America in Sacramento and London, England. Steve received a BA in Economics from the University of California at Davis and an MBA at the University of California at Berkeley.

## SPEAKER PROFILES



**Jeff Fuller** has over twenty years of experience in the energy industry. He is Director of Client Services at the Energy Authority within the Western Electricity Coordinating Council (WECC) region and is responsible for managing all relationships between clients

and TEA personnel and for ensuring the successful delivery of services. Jeff has assisted Redwood Coast Energy Authority, City of Solana Beach, and Desert Community Energy to implement and launch CCA programs. Jeff has a broad range of experiences including trading, analytics, short- and long-term power supply planning, and assisting with development and implementation of risk management programs.



**Samuel Golding** is President of Community Choice Partners and has been a community organizer and technical consultant in the CCE industry for eight years. He is recognized as a pioneer of the “CCE 2.0” and “CCE 3.0” maturity models, which are designed to simultaneously advance the operational capabilities of individual agencies while also accelerating joint-action agreements to deepen collaboration between multiple agencies.



**Jose Gonzalez** was the Sustainable Division Manager for the City of Fresno from 2013 to 2018. Jose has a degree in electronics, and is a certified electrician, HVAC mechanic, steam plant operator, industrial plant engineer, chief of facilities and division manager, grade IV from California Water Environmental Association and D1 from the State of California. Jose has worked in tech for about 16 years in the public and private sectors, including residential, commercial, and industrial work.



**Tom Habashi** serves as Monterey Bay Community Power’s CEO, a regional Community Choice Energy program which provides electricity to residents and businesses in 19 jurisdictions throughout Monterey, San Benito

and Santa Cruz Counties. Tom oversees and directs Monterey Bay Community Power’s energy acquisition, strategic plan, program implementation, operations, regulatory affairs, communications, and outreach.



**Ann Hancock** is co-founder and Executive Director of the Center for Climate Protection and she oversees the Clean Power Exchange. With more than 25 years in community leadership, education, and fundraising, Ann was part of the coalition of business and policy leaders

that got Sonoma Clean Power launched, and has been working on a statewide CCA movement since 2013. Ann also recently launched an activist training program to empower California residents to advocate for CCAs and other climate solutions throughout the state.



**Woody Hastings** is the Center for Climate Protection’s Energy Program Manager with over 28 years of experience in the non-profit, governmental, and private sectors. Woody specializes in Community Choice energy, a state policy that fosters energy democracy by empowering communities to establish their own not-for-profit electricity service, thereby taking control over decision-making about energy sources for electricity generation. Woody also manages the Clean Power Exchange.



**Betony Jones** is a Climate and Labor Research Specialist at UC Berkeley, as well as a private consultant. In her last 16 years as an independent consultant, she has focused on identifying the job and equity impacts of decarbonization, while designing innovative energy efficiency programs, as well as strategy consulting with foundations, non-profit organizations, local and state governments, and energy utilities. Betony holds a master’s in Environmental Science from Yale University and was a National Security Education Program Fellow in Environmental Science in the Clinton White House.



**Janice Lin** is founder and CEO of Strategen, where she brings over two decades of experience in clean energy and corporate strategy. She co-founded and directs the Global Energy Storage Alliance (GESA) and the California Energy Storage Alliance (CESA). Janice sits on the Electricity Advisory Council of the US Department of Energy and the Board of Advisors for the Energy Policy Initiatives Center (EPIC). Janice holds an MBA from Stanford Graduate School of Business and a BS and BA from University of Pennsylvania.



**Nelson Lomeli** is a Program Specialist supporting the Sonoma Clean Power program team with design, management, and implementation of customer-facing programs. Nelson has worked on the Drive EverGreen program iterations,

SCP’s solar programs, and the demand-response/management program, GridSavvy. Nelson previously worked with the Sonoma County Water Agency’s Energy Resources Group working on outreach and communication efforts for the early stages of Sonoma Clean Power’s development. Nelson holds a BA degree in Environmental Studies & Planning with an emphasis in Energy Management & Design from Sonoma State University.

## SPEAKER PROFILES



**Laura Manz** is the Director of Navigant, and brings over 30 years of experience in the energy industry in management and field experience in grid operations and planning, regulatory policy, power plant operations and interconnection, distributed energy, and advanced technology. She worked for the California Independent System Operator as Vice President – Market and Infrastructure Development with responsibility for grid planning and interconnections, market design, regulatory policy, and NERC compliance. She performed a Nodal Market Risk Assessment for ERCOT in Texas to support their conversion to a location-based marginal pricing model.



**Matthew Marshall** has served as the Executive Director of the Redwood Coast Energy Authority in Humboldt County since 2010. In this role he leads RCEA's community choice aggregation program (launched in May 2017), as well as efforts related to energy efficiency, electric vehicle charging infrastructure, renewable energy project development, and regional energy planning.



**Shawn Marshall** is the founder and Executive Director of LEAN Energy US (Local Energy Aggregation Network), a non-profit and consulting organization that exists to support the expansion of clean energy community choice aggregation (CCA). In 2007, Shawn served on the task force that ultimately became the Marin Energy Authority (MEA), a joint powers agency that runs the first CCA in California and the first clean energy CCA in the country. In addition to her work in the CCA field, Shawn served two terms on the Mill Valley City Council, as Mayor in 2008 and Vice Mayor in 2013.



**Kate Meis** has been at the Local Government Commission (LGC) for the last decade and has served as Executive Director since 2013. The LGC is a non-profit supporting local policymakers through nationally recognized events, low cost technical assistance and policy guidance on climate change, energy, water and community design. Kate oversaw the launch of many of the LGC's pioneering programs, including the Statewide Energy Efficiency Collaborative, the California Adaptation Forum, CivicSpark AmeriCorps Program, and the Alliance of Regional Collaboratives for Climate Adaptation. Kate serves as a board member of the American Leadership Forum and GRID Alternatives North Valley. She has been recognized for her climate-change work by the Chronicle of Philanthropy as one of the nation's "40 under 40 Young Leaders Who Are Solving the Problems of Today – and Tomorrow."



**Erika Morgan** is Executive Director of the San Diego Energy District and Operations Manager for the California Alliance for Community Energy, a statewide network dedicated to keeping "community" core to Community Choice. In New England, she formed an early electricity aggregation for 100% in-state renewables. In California, she supports Community Choice to speed the transition to a carbon-free electricity system responsive to community needs. She holds a master's in Public and Private Management from Yale University.



**Joseph Oldham** is the Director of the San Joaquin Valley Clean Transportation Center, a division of CALSTART and funded through a grant from the California Energy Commission. Joseph has been very active in promoting climate change adaptation, energy efficiency, alternative fuel vehicles, renewable energy, and "green" living through his involvement with the San Joaquin Valley Clean Cities Coalition, the California Partnership for the San Joaquin Valley, and the San Joaquin Valley Clean Energy Organization.



**Emily Pappas** is a partner in Niemela Pappas & Associates in Sacramento. Emily represents a diverse group of clients that includes CalCCA, MCE, trade groups, cities, water districts, and Fortune 500 companies. Emily has extensive experience in and outside California's Capitol and in Washington DC. She has a BA degree from UC Davis and an MBA from CSU Sacramento.



**Neal Reardon** serves as Regulatory Affairs Manager at Sonoma Clean Power. He is responsible for representing and advocating for SCP's interests in addition to assisting with compliance obligations and legislative efforts. Neal has over ten years of experience in the energy industry and has worked for a variety of financial institutions and consulting groups. Prior to his current role, he was a Senior Analyst with the California Public Utilities Commission (CPUC). Neal holds an MBA from the Fisher Graduate School of International Business and a master's degree in Environmental Policy from the Middlebury Institute of International Studies.

## SPEAKER PROFILES



**Gary Saleba** has been a principal of EES Consulting, Inc. (EES) since 1978 and is currently EES's President/CEO. His areas of expertise include overall quality control for all of EES's finance and engineering projects. Gary has extensive experience in the areas of utility rates and financial planning, resource acquisition, marketing and consumer research, forecasting, integrated resource planning, cost-benefit analyses and overall strategic planning. He has also served on numerous energy and natural resource-related trade associations. Gary has taught numerous technical seminars for the American Public Power Association, served as Chairman of American Water Works Association's Financial Management Committee and Management Division, and served two terms on the Board of Directors for the Northwest Public Power Association.



**Richard Schorske** is founder and Executive Director of the EV Alliance and the ZNE Alliance, which partners with cities, utilities, and industry and has worked with over 50 local, state, and national government agencies. Key projects include EV Readiness Plan development with the Cities of San Francisco, San Jose, and Richmond, the County of Ventura, the Monterey Bay Air Resources Board, the Port of Long Beach, and the Kingdom of Jordan. The Alliance is also partnered with the California Energy Commission and the Antelope Valley Transportation Authority to develop program models for integrating electric buses on California's utility grid. ZNE Alliance also leads two Advanced Energy Community projects for Lancaster Choice Energy and the City of Lancaster and for the City of Richmond.



**Chris Sentieri** is a Clean Energy, Climate Change and Sustainability policy consultant and program manager. He is currently serving as the Climate Solutions Manager for Blue Strike Environmental, a national sustainability consulting firm based in Monterey, California. Chris has extensive knowledge regarding Community Choice Aggregation and related local clean energy programming options and systems-level planning. His areas of expertise include distributed energy resource planning, microgrid technologies, GHG quantification and mitigation planning, stakeholder engagement, community organizing, and public policy development.



**Alice Stover** is the Manager of Policy and Planning on the Customer Programs team at MCE. In her role, she manages planning for Demand Side Resources, including energy efficiency, electric vehicles, and demand response. Prior to working at MCE, Alice spent four years in program evaluation. Alice has a master's degree in Natural Resources and Sustainable Development from American University.



**Greg Thomson** is Director of the Community Microgrid Initiative for the Clean Coalition. This initiative received a New York Prize grant award while contributing substantially to the California rulings to increase utility support for local clean energy and other distributed energy resources. Greg has also co-authored three winning California Energy Commission grant proposals focused on clean energy for communities.



**Eric Veium** manages Energy & Sustainability at Cal Poly, San Luis Obispo, helping the university achieve carbon neutrality and climate resilience. As a community leader and Director for SLO Clean Energy, he has been working for over a decade guiding San Luis Obispo County communities in the creation of a local clean energy economy.



**Kathy Wells** helped develop Lancaster Choice Energy's program, which launched in May of 2015. She serves as LCE's energy efficiency projects manager, developing energy programs for both residential and business customers, and oversees customer care efforts, including customer outreach and retention, marketing, and rate analysis. Kathy brings over 20 years of customer service experience to Lancaster Choice Energy. She began with the City in 1999 and has worked with Public Works, City Engineering, and City Administration. Kathy serves on the regulatory and legislative committee for California Community Choice Association (CalCCA).



**Jenine Windeshausen** is Placer County's lead on CCA development and implementation, Pioneer Community Energy. With over 30 years of government finance experience, Jenine has developed financing models for energy projects including: \$100 million bond for FERC relicensing of Middle Fork American River hydroelectric project (224 MW) and \$90 million for Placer County's mPOWER PACE Program.





## Community Choice Energy is underway in 30 counties and 300+ cities



### A program of the Center for Climate Protection

**CleanPowerExchange.org**



- **See our interactive map** updated weekly with current information on Community Choice activity in all 58 counties and 482 cities in California
- **Access resources and tools** for emerging and operating Community Choice agencies
- **Clean Power Exchange Webinars:** Join us for our next webinar on June 27th at 11am. Visit: [www.cleanpowerexchange.org](http://www.cleanpowerexchange.org) for more details.
- **Sign up for our bi-weekly e-news** at CPX for comprehensive, current Community Choice news from all over the state of California

### What people have to say about Community Choice:

“CCAs have already invested over \$2.5 billion to build new renewable energy here in California, supporting over 3,000 ‘green collar’ jobs, and our programs directly support social equity and fair rates. Together, we’re leading California towards achievement of its ambitious climate goals through a framework of choice, transparency, and equity.”

-Dawn Weisz  
CEO, MCE

“... There is a great opportunity to use the examples that other CCAs have established to help our elected officials and community members understand that this is real, and that there are some great opportunities and benefits of Community Choice.”

- Katie Barrows  
Director of Environmental Resources,  
Coachella Valley Association of Governments

“If we truly want to ensure a clean energy world for the generations to come, it is up to those of us at the local level to implement change...As a municipality, we had to step up and help our community take back the power. Now, the City of Lancaster has far exceeded what anyone believed it was capable of as a local government entity, becoming the Alternative Energy Capital of the World in a relatively short period of time.”

- R. Rex Parris  
Mayor of Lancaster

“One of the benefits will be that we will have much greater local control over the source of our energy. With that comes the ability to better align our energy sources with our local policies and the expectations of our constituents.”

- Mike Webb,  
City of Davis Assistant City Manager

**“We aim to deliver services that best meet our customers’ needs while satisfying California’s environmental mandates. We are excited to deliver more, cleaner energy.”**

Glenn Wright, President, Shell Energy North America



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Starting with the first California CCA in 2010, our team has supported 12 successful CCA program launches along with multiple, subsequent enrollment phases. In 2018 we are helping launch an additional 4 CCA programs and by midyear we will be the only CCA Data Manager serving all three Investor Owned Utility (IOU) territories in the state.

Our market leading 99.999% billing accuracy, coupled with our all-California, geo-redundant call center, protects our clients' public trust, allowing them to focus on pursuing their community's climate action goals and local program development initiatives.



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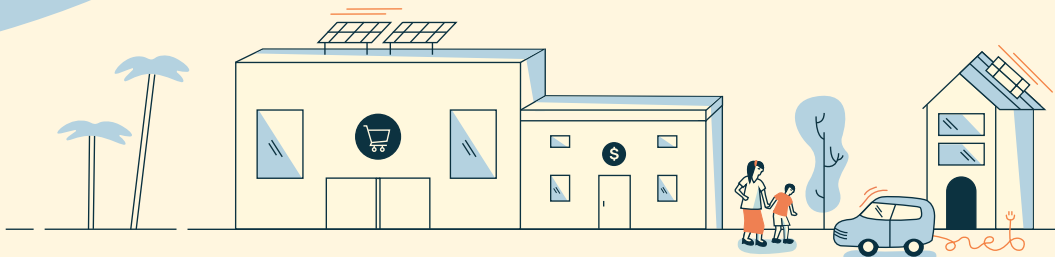
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# POWER with PURPOSE

center for  
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The Center for Climate Protection's Board President, Efren Carrillo, speaks at a rally at the California Public Utility Commission's headquarters in San Francisco on February 8, 2018.

## COMMUNITY CHOICE – A SPEED AND SCALE SOLUTION



**Ann Hancock**  
Executive Director,  
Center for  
Climate Protection

The Center for Climate Protection has prioritized Community Choice Energy since 2005. Why? Our vision is a positive future for ourselves, our children, and all life. This requires solutions that reduce greenhouse gas emissions at speed and scale. Policies that unleash market forces to lower emissions are the most powerful speed and scale solutions. Solutions like this make it easier for everyone to do the right thing. At the local level, Community Choice Energy exemplifies a powerful, politically-feasible, equitable, cost effective, speed and scale solution. Metrics for of Community Choice Energy's impacts prove this.



## COMMUNITY CHOICE IMPACTS

**\$33 MILLION**  
Customer savings in 2016\*

**940,000+**  
metric tons of GHGs  
avoided per year

**8-FOLD INCREASE**  
In money invested locally  
(Sonoma Clean Power results)

**2,800**  
jobs supported

**1,000+ MEGAWATTS**  
of new renewable energy  
as a result of Community  
Choice Energy, including:

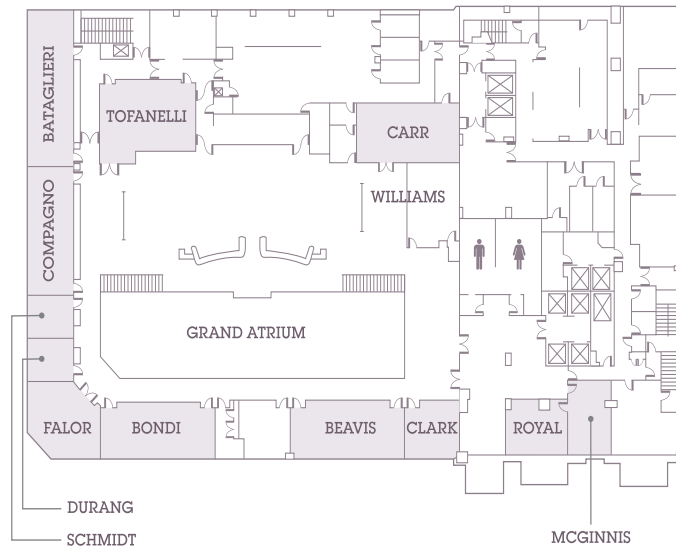
- 710 MW new solar
- 312 MW new wind
- 12 MW new bioenergy

\* most recent year of audited results

**SITE MAP**



**Level 2**



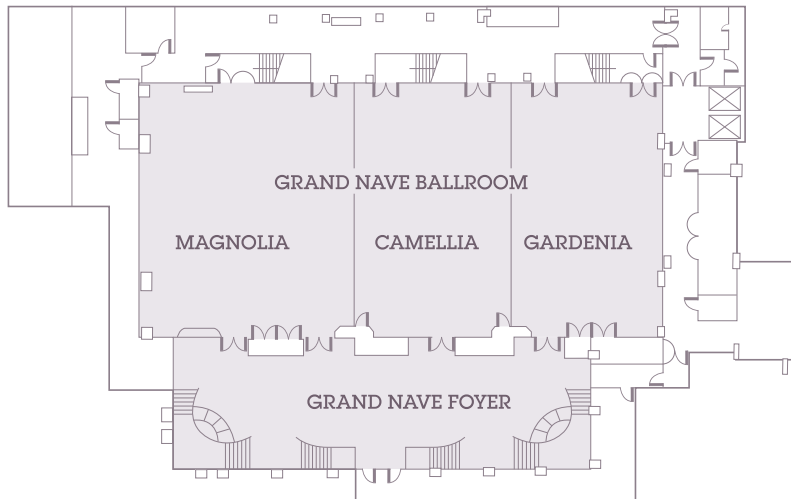
**Lobby Level**

Public Market Bar  
Glide's Event Space

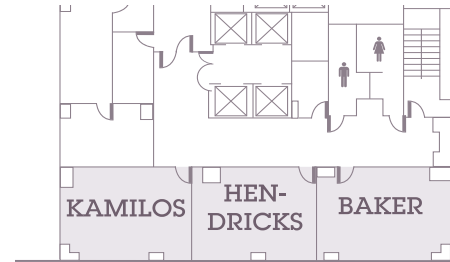
**Level 4**

Sheraton Fitness  
Swimming Pool  
Executive & Sales-Catering Office

**Lower Level**



**Level 3**



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