



THE BUSINESS OF LOCAL ENERGY SYMPOSIUM

DRAFT Agenda
Irvine, CA.

Thursday, June 20, 2019 – Pre-Symposium Workshops

1:30 - 3:00 pm	Workshop: Managing Risk in a Dynamic Environment <i>This workshop takes a board view of the different risks facing CCAs. It will explore a range of CCA risk factors and mitigation measures including market risks, legislative and regulatory risks, and local energy programming risks. The presenters will discuss an array of tools and strategies designed to manage these risks, and how CCA risk management is evolving in these dynamic times.</i> Moderator: Chris Sentieri, Senior Manager, EcoShift Consulting, a division of Blue Strike Environmental Alan Roark, Senior Principal, ABB Jaclyn Harr, Client Service Specialist, The Energy Authority Matthew Marshall, Executive Director, Redwood Coast Energy Authority Taj Ait-Laoussine, Vice-President, Technology & Analytics, East Bay Community Energy
3:00 - 3:30	Networking Break and Snack
3:30 - 5:00	Breakout Workshops: Accelerating Adoption of Zero Emissions Vehicles <i>California's Low Carbon Fuel Standard (LCFS) program enables CCAs, fleet operators and electric vehicle (EV) charging hosts to capture monetary credits for providing electricity as a transportation fuel. What near-term activities should CCAs pursue and who should they partner with to help accelerate electric mobility? Learn more about this LCFS program and opportunities for CCAs to create solutions to spur the adoption of EV while significantly reducing emissions from the transportation sector.</i> Moderator: Trina Martynowicz, Distributed Generation, Clean Vehicles & Energy Coordinator, US Environmental Protection Agency Arpit Soni, Air Pollution Specialist, California Air Resources Board Ben Foster, President, Fosterra, LLC

	<p>Kathy Wells, Energy Project Coordinator, Lancaster Choice Energy Jessie Denver, Manager, Distributed Energy Resources Program, East Bay Community Energy</p> <p>CCA Cutting Edge Research Projects <i>Learn about California Energy Commission supported research at MCE to create a tool to analyze buildings for a suite of distributed energy resources and to provide the optimum mix of resources for both the customer and the CCA. Other research answers the question should CCAs offer 100% renewable as a default product? What is Lancaster Choice Energy doing to actualize their vision for integrated local resource development?</i></p> <p>Moderator: Rick Brown, President and Board Chairman, TerraVerde Energy Ali Chehrehfaz, EVP Engineering, TerraVerde Energy Jakub Zielkiewicz, Advanced Projects Advisor, Bay Area Air Quality Management District Jenna Famular, Community Development Manager, MCE Rhetta deMesa, Advisor to Vice Chair Scott, California Energy Commission Richard Schorske, Executive Director, ZNE Alliance / EV Alliance</p>
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Friday, June 21, 2019 - Symposium

8:00 - 9:00 am	Registration and Breakfast
9:00 - 9:10	Introduction – Grand Ballroom Ann Hancock, Executive Director, Center for Climate Protection
9:10 – 9:20	Welcome to Orange County
9:20 – 9:30	Leading in a Dynamic Environment Geof Syphers, Chief Executive Officer, Sonoma Clean Power
9:30 -10:40	Keynote Panel: Utility and Regulatory Reform, What Does the Future Look Like? <i>Approximately 25 percent of the state’s population – 11 million people – live in an area that is classified as under very high or extreme wildfire threat. PG&E has filed for bankruptcy protection in the face of wildfire liability and two other major investor-owned utilities in southern California have had their credit ratings downgraded. How do we reach California’s clean energy and climate goals while providing reliability, safety and resilience to our</i>



communities? What role do the utilities play and how do they need to change? What is the role for CCAs?

Moderator: Rick Brown, President and Board Chairman, TerraVerde Energy
Angelina Galiteva, Board of Governors, California Independent System Operator
Clifford Rechtschaffen, Commissioner, California Public Utilities Commission
Kendall Helm, Vice President Energy Services, San Diego Gas and Electric
Shalini Swaroop, General Counsel, MCE

10:40 - 11:10

Networking Break – Snack served in Exhibitor Area

Breakout Panels

Operational Excellence: Best Practices and Industry Coordination on Future Solutions – Salon E

CCAs continue to evolve rapidly as California grapples with unprecedented market challenges and regulatory reforms. Experts will discuss best practices and how CCAs are looking ‘over the horizon’ to operationalize multi-sectoral ‘deep decarbonization’. As California evolves towards a DSO market structure, CCAs are working with IOUs and other stakeholders to integrate DER. Awareness is growing that CCAs’ collaborative ‘systems thinking’ approach to deploying innovative technologies is the ‘missing link’ needed to maintain safety, reliability and affordability in our rapidly-changing industry.

Moderator: Sam Golding, President, Community Choice Partners
JP Ross, Director, Local Development, Electrification and Innovation, East Bay Community Energy

11:10 - 12:10 pm

Stewart Ramsey, Managing Executive, Vanry Associates
Tom Habashi, Chief Executive Officer, Monterey Bay Community Power

Programs that Respond to Community Needs - Trabuco

One of the advantages CCAs have in differentiating themselves from the utilities is their ability to design programs that respond to community needs and values. Examples include Sonoma Clean Power's Advanced Energy Rebuild program, providing incentives to homeowners who lost their homes in the 2017 wildfires, and MCE's Solar One that collaborated with organizations to train at-risk youth in solar photovoltaic technology. Hear what organizations have considered in designing and implementing these programs and what lessons they have learned.

Moderator: Woody Hastings, Energy Program Manager, Clean Power Exchange, Center for Climate Protection

Chris Sentieri, Senior Manager, EcoShift Consulting, a division of Blue Strike Environmental

Kathy Wells, Energy Projects Coordinator, Lancaster Choice Energy
Jana Kopyciok-Lande, Senior Policy Analyst, MCE



Keeping the Community in Community Choice - Theater

How are CCAs serving disadvantaged communities? Can they support community owned revenue generating assets in low income neighborhoods? How can a more engaged stakeholder process benefit local planning and programming efforts?

Moderator: Nancy Barba, Manager, Frontier Energy

Alexis Garcia-Arazola, Public Engagement Associate, Monterey Bay Community Power

Cris Gutierrez, Community Advisory Committee, Clean Power Alliance

Jesse Hernandez, Consultant, JCH Research

The CCA Regulatory Landscape: The Power Charge Indifference Adjustment (PCIA) and other Issues – Salon D

Today's State-wide energy regulatory and policy atmosphere is changing rapidly. Panelists will share insights on the many regulatory proceedings underway that directly or indirectly impact CCAs, including the Power Charge Indifference Adjustment (PCIA), Resource Adequacy, Integrated Resource Plans, etc.

Moderator: Scott Blaising, Attorney, Braun Blaising Smith Wynne, P.C.

Greg Bass, Regulatory Director, Calpine Energy Solutions

Irene Moosen, Director of Regulatory Affairs, California Community Choice Association

Neal Reardon, Director, Regulatory Affairs, Sonoma Clean Power

Building Decarbonizing: How CCAs Can Help - Saddleback

Reducing emissions from the built environment will be critical to achieving climate mitigation goals. By investing strategically in community programs, outreach and education, and through strategic partnerships, CCAs can accelerate the shift away from natural gas toward full, clean, electrification. What are strategies to do this effectively or affordably?

Moderator: Margaret Bruce, Program Manager, Local Government Commission

Farhad Farahmand, Senior Project Manager, TRC Advanced Energy

Garrett Wong, Senior Sustainability Analyst, City of San Monica

Rafael Reyes, Director of Energy Programs, Peninsula Clean Energy

Building a CCA from Scratch: What You Need to Know – Shady Canyon

Everything you need to know about developing a Community Choice Agency from people who have been there, including community organizing and outreach, governance models, doing technical studies, risk assessment, procurement, and financing.

Moderator: Alexia Retallack, Marketing and Government Affairs Manager
Pioneer Community Energy
Greg Wade, City Manager, City of Solana Beach
Jeff Fuller, Director of Client Services, The Energy Authority
Jim Parks, Outreach Director, Valley Clean Energy

12:10 - 12:25 **Break**

12:25 - 12:55 **Lunch** – Grand Ballroom

12:55 - 1:30 **Keynote Address: How We Got Here & How We Will Get to 100%**
Former Senator Fran Pavley

1:30 - 1:45 **CCA Project Spotlight**
Woody Hastings, Energy Program Manager, Clean Power Exchange, Center for Climate Protection

1:45 - 2:00 **Break**

Breakout Panels

Legislative Outlook - 2019-2020 – Salon E

Discussion about the key policy principles and legislative priorities common to all CCAs, current bills that have direct or indirect bearing on CCAs, and a conversation about the balance between engaging proactively and reacting defensively in the legislative arena.

2:00 - 3:00 Moderator: Sean MacNeil, Director of Legislative Affairs, California Community Choice Association
Allie Detrio, Policy Manager, Engie
Lindsey Horvath, Mayor Pro Tempore, City of West Hollywood, Chair, Legislative & Regulatory Committee, Clean Power Alliance
CC Song, Regulatory & Legislative Policy Manager, MCE

CCA Collaborative Partnerships: Strengths & Limitations - Saddleback

A discussion of how CCAs are working together on joint procurement, joint Resource Adequacy procurement, on program design and implementation, and what other areas they might effectively collaborate in.

Moderator: Howard Choy, Senior Associate, EES Consulting
Cathy DeFalco, General Manager, California Choice Energy Authority



Rafael Reyes, Director of Energy Programs, Peninsula Clean Energy
Rachel Bird, Director of Policy and Business Development, West,
Borrego Solar Systems

Community Choice Energy in Orange County - Advancing the Model – Theater
How can we ensure that CCAs launched in Orange County build on the success and lessons-learned of those who have gone before and move the needle on developing local clean energy resources and programs, benefiting Orange County residents and engaging them in the process?

Moderator: Scott Kitcher, President and CEO, Sustain OC
Amber Nyquist, Manager, Economic Evaluations, EES Consulting
Robin Ganahl, Orange County Organizer, Climate Action Campaign
Sona Coffee, Environmental Programs Administrator, Public Works, City of Irvine

Financing: Tried & True and Innovative Approaches - Trabuco
This panel will cover the basics of financing a CCA including working capital needs and project financing, but will also explore and innovative approach to financing local resources that requires changing the way most CCAs look at procurement decisions.

Moderator: John McCray-Goldsmith, Director Barclays Capital
Elizabeth Kelly, Owner, Law Office of Elizabeth Kelly
Peter Luchetti, Managing Partner, Table Rock Partners
Steve Fleming, President and Chief Executive Officer, River City Bank
Tom Habashi, Chief Executive Officer, Monterey Bay Community Power

Integrated Planning for Energy & Resilience – Salon D
This discussion will focus on integrating distribution system planning, energy resource planning and city/county planning for electrification and resilience. What is an Advanced Community Energy plan? Learn about the Advanced Rate Structure Project funded by the National Renewable Energy Laboratory's Solar Energy Innovation Network. This project is intended to deliver a replicable, scalable, and actionable DER rate structure tool that will allow CCAs to expedite and guide Solar + Dispatchable Storage DER deployment.

Moderator: Rick Brown, President and Board Chairman, TerraVerde Energy
Kathy Wells, Energy Projects Coordinator, Lancaster Choice Energy
Lorenzo Kristov, Consultant, Energy and Economics, formerly with California Independent System Operator
Rick Bolton, CEO, Compass Energy Platform, LLC.
Storn White, Director of Software Development, TerraVerde Energy

3:00 – 3:25

Networking Break



3:25 - 3:50

CCA Developments Around the US: Challenges and Opportunities

Shawn Marshall, Founder, Executive Director, Local Energy Aggregation Network (LEAN) US - Grand Ballroom

3:50 - 4:20

Utility Business Model Reform and Optimizing Distribution System Operation

Lorenzo Kristov, Consultant, Energy and Economics, formerly with California Independent System Operator - Grand Ballroom

Introduction by: Robert Pierce, Director Energy Marketing, Shell Energy North America

Introduction by: Josh Brock, Director CCA Client Services, Calpine Energy Solutions

4:20 - 5:25

Plenary Panel: The State of CCA in CA – Fulfilling the Vision

What are CCAs doing well and where are they facing challenges? What does leading in a dynamic environment mean? What role will they play to getting to 100% renewable energy, decarbonizing the economy and how can they provide affordable, reliable and resilient power to their whole community?

Moderator: Sammy Roth, Climate & Energy Reporter, Los Angeles Times
Barbara Hale, Assistant General Manager, CleanPowerSF
Matthew Marshall, Executive Director, Redwood Coast Energy Authority
Ted Bardacke, Executive Director, Clean Power Alliance of Southern California
Tom Habashi, Chief Executive Officer, Monterey Bay Community Power

5:25 - 5:30

Closing Remarks

Barry Vesser, Deputy Director, Center for Climate Protection

5:30 - 6:30 pm

Networking Reception

