

Key Concepts and Processes – Building Blocks for a Successful EPC

One-Day Training Workshop Syllabus

Course Description:

This one-day (8 hour) course is designed to assist PHAs seriously considering an Energy Performance Contracts (EPC) and needing training specific to understanding the necessary process steps to procure, evaluate and select an Energy Services Company or undertake a self-developed project.

Topics include: HUD incentives and requirements; EPC project planning components and HUD approval process; Section 3 – resident opportunities; Section 30 – HUD security interest approval; performance measures; measurement and verification approaches; Rental Assistance Demonstration (RAD) overview; resiliency requirements; project economics; the RFP process; eligible ECMs; financing; and, HUD reporting forms.

Audience: All PHAs contemplating establishing an EPC program, and PHAs that are in the formative stages of implementing an EPC program within their organization

Course Objectives

- Become familiar with the qualification requirements for using all of HUD's energy incentives
- Understand EPC project planning, economics and the roles and responsibilities of the PHA
- Review HUD requirements associated with Section 3
- Become familiar with third party financing and Section 30 Requirements
- Learn about the measurement and verification approaches available to analyze and evaluate EPC performance and appropriate performance measures
- Learn how to develop an effective Request for Proposal/Qualifications to secure qualified Energy Service Providers to support your project
- Become familiar with a variety of qualified energy and water conservation and resiliency measures
- Become familiar with HUD forms and spreadsheet documents: HUD cost summary; cash flow; baseline adjustments, inflation factor, utility allowance; and HUD forms 52722/52723, etc.
- Understand the review, evaluation and approval role of HUD in the EPC process
- Learn RAD principles and how RAD intersects with an EPC

Session 1 8:30 – 9:00 (30 min)	Defining the Landscape – Why Energy and Water Conservation Should be a Priority a. What is an EPC? b. An Historical Perspective c. HUD’s EPC Program
Session 2 9:00 – 9:45 (45 min)	HUD’s Energy Incentives – Can I Get HUD To Pay For My Energy and Water Capital Improvements? a. EPC Incentives b. Other Incentives (Non-EPC) c. 52722/52723 Overview
9:45 -10:00	Break (15 minutes)
Session 3 10:00 -10:30 (30 min)	Intersection of Energy Performance Contracts and Rental Assistance Demonstration (RAD) a. Overview - RAD b. RAD Considerations for New EPCs
Session 4 10:30 – 11:00 (30 min)	What Are My Options For Initiating An EPC Project? a. What Are Important Factors to Consider? Self-Assessment Exercise. b. Energy Service Company (ESCO) Managed Project c. EPC Self-Managed Process d. Aggregated Project
Session 5 11:00 – 11:30 (30 min)	Initiating a Project a. Where Do I Begin? b. Selling An EPC Project to My Executive Director; to My Board
Session 6 11:30 – 12:00 (30 min)	Selecting the Right ESCo/Consultant a. Developing/Issuing an RFP b. Evaluating Proposals – Developing a Methodology c. Qualifications - Negotiable and Non-Negotiable Criteria d. Interview and Section Process - Key Questions
12:00 – 1:00	Lunch (60 minutes)
Session 7 1:00 – 1:30 (30 min)	Investment Grade Energy Audit (IGEA) a. What Is an IGEA? b. Key Requirements c. Eligible ECMs d. Affordable, Innovative Technologies, Resiliency Measures
Session 8 1:30 – 2:15 (45 min)	HUD’s EPC Review Process – Overview a. HUD Review and Approval Requirements b. PHA Roles and Responsibilities c. Lessons Learned - HUD Technical Review Comments
2:15 – 2:30	Break (15 minutes)
Session 9 2:30 – 3:00 (30 min)	Financing and Repayment a. Selecting a Financial Institution b. Financing Barriers/Opportunities/Incentives c. Section 30 Requirements
Session 10 3:00 – 3:30 (30 min)	Performance Measurement - How Do I Know If I Am Achieving Expected Savings? a. Measure & Verification Principles b. Benchmarking
Session 11 3:30 – 4:00 (30 min)	Section 3 Compliance Requirements – Resident Training and Job Opportunities a. Section 3 Overview b. PHA Responsibilities