Wednesday, October 21

8:30 a.m.-9:00 a.m. Conference Room Open; Meet & Greet; Distribution of Summit Materials; Light Breakfast & Coffee

9:00 a.m.-9:30 a.m. Welcome; Introductions; Opening Remarks
Mark Wolfe, Energy Programs Consortium
Cisco DeVries, Renew Financial
Bruce Schlein, Citi

9:30 a.m.-10:45 a.m. Session 1: WHEEL 2.0 Announcements and Updates, followed by a moderated review of each sponsors’ policy priorities and challenges

Key Outcomes:
- An understanding of which Sponsors share similar goals/priorities
- Basic knowledge of how to access a permanent source of sponsor capital in every state

Moderator: Peter Gage, Renew Financial
Leads: Keith Welks, Pennsylvania Treasury
       Alistair Clark, New York Green Bank

10:45 a.m.-11:00 a.m. Break
11:00 a.m.-12:15 p.m. Session 2: WHEEL Nuts and Bolts, Now and in 2016—How Does WHEEL Really Work? What Are the Various Roles & Responsibilities? As WHEEL expands, how can Sponsors help to shape it?

Key Outcomes:
- A clear understanding of how and why WHEEL works
- Opportunity to review and influence 2016 WHEEL priorities

Moderator: Elizabeth Bellis, Energy Programs Consortium
Leads: Brenda Weaver, Kentucky Housing Corporation
       Joanna Karger, Renew Financial

12:15 p.m.-1:30 p.m. Lunch Assignments
Attendees will be divided into groups, each of which will brainstorm to overcome a key challenge one or more Sponsors currently face

Key Outcomes:
- A clear set of recommendations and next steps for each identified challenge

Introduced by Peter Krajsa, AFC First
Leads: Andy Holzhauser, Greater Cincinnati Energy Alliance
       Chris Calvert, Greater Cincinnati Energy Alliance
       Timothy Block, Southeast Energy Efficiency Alliance

1:30 p.m.-2:30 p.m. Report Out and Discussion of Lunch Assignments

Moderator: Paul Scharfenberger, Colorado

2:30 p.m.-3:45 p.m. Session 3: Using WHEEL as a Building Block to Achieve Other Policy Goals. Policy goals may include 111d compliance, residential & commercial PACE, and/or development of a solar loan program

Key Outcomes:
- A clear set of recommendations & next steps for sponsors who wish to leverage WHEEL’s success to achieve additional goals

Moderator: Colin Bishopp, Renew Financial
Leads: Megan Otteson, Indiana Office of Energy Development
       Tony Morgan, Florida Department of Agriculture and Consumer Services

3:45 p.m.-4:00 p.m. Sponsors Complete Questionnaire and Binder Materials

4:00 p.m.-4:45 p.m. Recap and Concluding Remarks