

2019 State Energy Program National Training Forum Agenda

Monday, August 12

1:30pm–
4:30pm

Optional Tour of NREL

For those who have received a registration confirmation, a tour of the NREL Energy Systems Integration Facility (ESIF) is arranged from 1:30pm–4:30pm. Transportation will be provided from the hotel to and from NREL. The bus will depart from the hotel lobby at 1:30 p.m.

Tuesday, August 13

7:30am–
8:30am

Continental Breakfast and Registration

8:30am–
9:00am

Opening Remarks (Majestic Room)

Presenter:

- **Amy Royden-Bloom**, Manager, State Energy Program, U.S. Department of Energy

9:00am–
10:30am

Federal Regulations (Majestic Room)

Understanding the Federal regulations and provisions applicable to your DOE award is critical. Expect an overview of the Terms and Conditions of your award as well as “must know” aspects of federal regulations and prior approvals as specified in 2 CFR 200. A discussion around State responsibilities in regards to the National Environmental Policy Act (NEPA) and the National Historic Preservation Act (NHPA) compliance processes will also be included.

Moderator:

- **Henry Fowler**, Project Officer, State Energy Program, U.S. Department of Energy

Presenters:

- **James Cash**, Grants Management Specialist, U.S. Department of Energy
- **Diana Heyder**, Environmental Protection Specialist, U.S. Department of Energy
- **Casey Strickland**, Environmental Protection Specialist, U.S. Department of Energy

10:30am–
10:45am

Break

10:45am–
11:45am

Allowable Use of SEP Funds (Majestic Room)

Presenter: This session will cover the many allowable uses of funds and flexibility in the types of programs and projects States can choose to pursue through the State Energy Program (SEP). It will also speak to activities that are mandatory to be included in a SEP plan and touch on those that are prohibited.

Moderator:

- **Gordon Gore**, Project Officer, State Energy Program, U.S. Department of Energy

Presenters:

- **Greg Davoren**, Lead Energy Project Specialist, State Energy Program, U.S. Department of Energy
- **Wil Mannes**, Associate Program Manager Commercial and Industrial Energy Services, Colorado Energy Office
- **Karen R. Lasure**, Energy Development Specialist, West Virginia Division of Energy

11:45am–
12:45pm

Networking Lunch (Vail Room)

2019 State Energy Program National Training Forum Agenda

Concurrent Sessions

1:00pm–
2:00pm

Breakout 1: Introduction to SEP (Majestic Room)

This session will serve as an SEP primer for newcomers to the program and will include an overview of the SEP Operations Manual, PAGE reporting, actions requiring Contracting Officer approval, and a discussion around closeout responsibilities.

Presenters:

- **John Merenda**, Project Officer, State Energy Program, U.S. Department of Energy
- **Robert Hu**, Analyst, Allegheny Science and Technology
- **Elizabeth Grimes**, Energy Program Manager, Alabama Department of Economic and Community Affairs

1:00pm–
2:00pm

Breakout 2: Strategic Planning for Formula Funds (Terrace Room)

Whether it be a phased approach to program implementation or a one-time initiative to meet State policy goals, expect an interactive discussion around short and long-term strategic planning for the use of SEP Formula funds. Also included will be an introduction to the many tools that can be utilized to support long term planning efforts.

Moderator:

- **Pete Gingrass**, Project Officer, State Energy Program, U.S. Department of Energy

Presenter:

- **David Gipson**, Energy Division Director, Georgia Environmental Finance Authority

Concurrent Sessions

2:15pm–
3:15pm

Breakout 1: Administrative Best Practices Roundtable (Terrace Room)

During this roundtable discussion, States will have the opportunity for an open conversation with peers and DOE on tasks associated with successfully administering their SEP Formula award. Both newcomers and those wishing to hone their skills are encouraged to attend.

Moderators:

- **Julie Howe**, Project Officer, State Energy Program, U.S. Department of Energy
- **George Thompson**, Federal Grant Officer/State Energy Program Manager, Oregon Department of Energy
- **Kari Moeller**, Grants Coordinator, Minnesota Department of Commerce

Breakout 2: Maximizing Financing Programs (Majestic Room)

This session will puzzle out the financial landscape and explore the potential for SEP formula funds to support financing programs. ARRA-funded financing programs, repurposing, and associated flow-down requirements will also be considered.

Presenters:

- **Sharon Gill**, Project Officer, State Energy Program, U.S. Department of Energy
- **Ryan Young**, Energy Team Project Manager, Iowa Economic Development Authority
- **Catherine Reed**, Deputy Director, Energy Office South Carolina Office of Regulatory Staff
- **Ann Riley Harmon**, Sr. Fiscal Manager, Department of Administration, SC Office of Regulatory Staff

2019 State Energy Program National Training Forum Agenda

3:15pm– 3:30pm	Break
3:30pm– 4:30pm	<p>Designing Effective Programs through Stakeholder Engagement (Majestic Room)</p> <p>Do you have the right people in the room to move your initiative forward? Who are the players that can help leverage your SEP dollars? Identifying, analyzing and engaging stakeholders can be critical to the success of your project or program, and full communication with your stakeholders is a key to success. Attendees will have the opportunity to learn effective strategies from other energy program managers and fellow State officials.</p> <p><i>Moderator:</i></p> <ul style="list-style-type: none"> • Charles Satterfield, Project Officer, State Energy Program, U.S. Department of Energy <p><i>Presenter:</i></p> <ul style="list-style-type: none"> • Michelle Gransee, Director, Minnesota State Energy Office
5:30pm– 7:00pm	<p>Networking Happy Hour Sheraton 15 FIFTY Lounge</p>
Wednesday, August 14: Day Two	
8:00am– 8:30am	Continental Breakfast
8:30am– 9:30am:	<p>SEP Updates: Reporting Guidance, Market Titles and Metrics (Majestic Room)</p> <p>This session will cover exciting updates to the SEP formula program. Topics to be covered include refreshed metrics, the State-led initiative to revise market titles, and a Historical Preservation status update.</p> <p><i>Moderator:</i></p> <ul style="list-style-type: none"> • Pete Davis, Branch Chief, State Energy Program, U.S. Department of Energy <p><i>Presenters:</i></p> <ul style="list-style-type: none"> • Molly Cripps, Director, Tennessee State Energy Office • Robert Hu, Analyst, Allegheny Science and Technology • Diana Heyder, Environmental Protection Specialist, U.S. Department of Energy • Casey Strickland, Environmental Protection Specialist, U.S. Department of Energy
9:30am– 10:30am	<p>Energy Efficiency Leadership Framework: Overcoming Barriers to Unlock Energy and Cost Savings (Majestic Room)</p> <p>The WIP Partnerships and Technical and Assistance Team (P&TA) is excited to announce the launch of the Energy Efficiency Leadership Framework (Leadership Framework) — an initiative designed to maximize energy and cost savings for states, local governments, and K-12 school districts by more strategically targeting high-impact DOE technical assistance opportunities. Jenah Zweig, Supervisor of Partnerships & Technical Assistance with DOE, will describe how the Leadership Framework seeks to identify some of the most pervasive barriers preventing significant energy and cost savings. WIP also invites your input, so we can: (1) make solutions and replicable models more accessible, (2) enable strategic planning of potential technical assistance that is responsive to your most impactful needs, and (3) identify gaps where additional resources are needed.</p> <p><i>Presenter:</i></p> <ul style="list-style-type: none"> • Jenah Zweig, Supervisor, Partnership & Technical Assistance Program, U.S. Department of Energy

2019 State Energy Program National Training Forum Agenda

10:30am– 10:45am	Break
10:45am– 11:45am	Demonstrating Innovation and SEP (Majestic Room) <p>In this session, you will learn about how your annual summaries are helping DOE to better analyze the impact of the SEP formula program and also hear from peers on how their formula funds were used to support highly innovative projects. Success stories from the field will be highlighted and DOE will describe what it is looking for in a success story, the process involved, and current priorities.</p> <p><i>Moderator:</i></p> <ul style="list-style-type: none">• Amy Kidd, Team Lead, State Energy Program, U.S. Department of Energy <p><i>Presenters:</i></p> <ul style="list-style-type: none">• Kelsie Bell, Project Officer, State Energy Program, U.S. Department of Energy• Michael Spencer, Energy Manager, Alaska Housing Finance Corporation• Kari Moeller, Grants Coordinator, Minnesota Department of Commerce
11:45am– 12:45pm	Networking Lunch (Vail Room)
1:00pm– 2:00pm	Subrecipient Monitoring Best Practices: Arizona’s journey towards a Statewide Plan (Majestic Room) <p>Join the State of Arizona’s Office of Grants and Federal Resources as they present on practical implementation, cost-effective strategies, and personal experience of implementing a “Statewide Subrecipient Monitoring Plan” as required in Federal Uniform Guidance. Discussion will include both subrecipient monitoring policy and practical implementation of monitoring activities as a Statewide enterprise.</p> <p><i>Presenters:</i></p> <ul style="list-style-type: none">• Anna N. Haney, Deputy Statewide Grant Administrator, Office of Grants and Federal Resources, Arizona Department of Administration• Veronica Peralta, Grants Compliance Manager, Office of Grants and Federal Resources, Arizona Department of Administration
2:00pm– 4:30pm	Peer Exchange (Majestic Room) <p>Get ready to apply what you’ve learned during the Forum to work with a team in developing a hypothetical SEP program! Using the activities we often see pursued using Formula funds, the SEP team has developed a list of topics to discuss in small groups with your peers. <i>A list of several core topics for consideration along with session expectations can be found in your registration packet.</i></p>
4:30pm– 4:45pm	Forum Wrap-up and Final Thoughts
Thursday, August 15	
8:30am– 11:30am	Optional Tour of NREL <p>For those who have received a registration confirmation, a tour of the NREL Energy Systems Integration Facility (ESIF) is arranged from 8:30am-11:30am. Transportation will be provided from the hotel to and from NREL. The bus will depart from the hotel lobby at 8:30am.</p>