Energy Action Team
Portland 2030 District Kick-Off Meeting

Meeting Notes

Wednesday, October 1st, 2014
9:30 a.m. to 11:30 a.m.
Burt Fisher Conference Room, First Floor
One City Center, Portland

9:30 a.m. – 9:35 a.m. Welcome and Introductions – Mark Ouellette, Director, Mobilize Maine

Mark Ouellette welcomed everyone to the meeting and explained what Mobilize Maine is, Portland 2030 District and its relationship to GPCOG. He had individuals introduce themselves. Present at the meeting were Mark Ouellette, Mobilize Maine; Jennifer Puser Brennan, GPCOG; Neal Allen, GPCOG; Jeff Packard, Alodyne/Energy Action Team; Drew Swenson, Paragon Management; Trish Weimer, J.B. Brown & Sons; Pete Quesada, Fore River Co.; Jim O’Donnell, Dirigo Management Company; Todd Dominski, East Brown Cow; and Ed Suslovic, GPCOG Board Chair and Portland City Councilor.

9:35 a.m. – 9:45 a.m. Why is this Initiative Important? - Drew Swenson, Paragon Management

Drew Swenson of Paragon Management made some comments focused on the opportunity that Portland 2030 District presents and its emphasis on being private-sector led. He said that property owners and managers like himself are interested in doing good socially but are also focused financially on the bottom line. His interest is in doing projects getting financing and seeing results. He also emphasized that enhancing Portland’s brand and property owners’ and managers’ brands is a great thing. Talking about and working on energy, water and transportation in their buildings creates benefits by keeping building occupied and taking on deferred maintenance. However, he wants to know what is it going to cost and what is the return on investment? He said there is a lot of data out there but you can’t compare Portland to all other cities, but we can gain and share good information with other 2030 District Cities similar to Portland, anonymously, that will be able to show data and leverage good information. He also said that we need to explore some good local financing options and he’s been talking to some non-profits that are willing to lend money at low interest rates. He concluded by saying that he’s interested and excited in this project.

9:45 a.m. – 10:15 a.m. Overview of 2030 District - Jeff Packard, CEO, Alodyne and co-chair, Energy Action Team & Jennifer Puser Brennan, GPCOG and co-chair, Energy Action Team
What is a 2030 District and what are the Goals?
Timeline for Portland 2030 District
Member Benefits: Benchmarking, Best Practices/Case Studies, 21st Century Technology Tools, Cooperative Purchasing, Revolving Loan Fund & Water/Transportation Plans
Current Members and Status of Portland 2030 District

Jeff Packard described what a 2030 District is and the overall goals which are to reduce energy, water and transportation emissions 50% by 2030 along with some incremental goals along the way within the specific geographic boundaries established by each District, including new buildings.

Jennifer Puser Brennan discussed the proposed timeline of tasks and deliverables for the next six months which includes:
- **Oct. – Dec.:** Energy data collection, benchmarking (5 existing members), begin local baseline, sign charter & member commitment letters. *Meet December 3rd*
- **Dec. – March:** Provide various case studies, (both national and local), hold 1 technical workshop on lighting with local expert resources, financing options, and ROI. *Meet March 4th*

Jeff Packard briefly described the benchmarking associated with the 2030 Districts and the on-line Portfolio Manager tool that all Districts are using.

Jennifer Puser Brennan said that another benefit to members will be special pricing on a number of products and equipment through the existing cooperative purchasing program currently being used through the 2030 Architecture group on LED lighting and the program that GPCOG runs for its municipalities that she will be managing for now on. She said she would like to learn what other products and equipment member owners and managers are interested in purchasing. She also mentioned that GPCOG has an existing RLF that could be used for gap financing and that GPCOG has the expertise to provide businesses with individual transportation plans and eventually water reduction plans.

Jeff Packard gave a review that Portland 2030 District is currently an “emerging” District along with 9 other cities and that there are 5 established Districts that include Denver, Seattle, Cleveland, Pittsburg and Los Angeles.

Ed Suslovic offered that GPCOG through its RLF would like to meet financing needs for this project.

Pete Quesada had to leave the meeting at this time but said he was interested in benchmarking one of their buildings to start.

Jim O'Donnell asked if the 2030 District covers multi-family and Jennifer answered yes it does. He said they have some old properties and water is a big issue including sewer costs.

Ed Suslovic offered a suggestion that for future meetings that we should have clear goals and definitions of success for this project. He was interested to know how we are defining success on this project. He also wanted to know what potential obstacles the City may have in place that might be hindering this project. He also wanted to know what ways the City could be helpful. He said the City stands to benefit from this effort as a green city and from an economic development standpoint. Branding Portland as green will help attract and retain our young people.

Mark Ouellette responded that we want to make sure that this initiative stays private sector led and voluntary and be careful not to require any mandates. Second, Mark asked the City to join the private property owners and benchmark the City’s buildings.
10:15 – 10:45 a.m. Energy Benchmarking through Portfolio Manager – Dave Low, former Seattle 2030 District member and Sustainability Coordinator for Kidder Mathews

Dave Low gave a presentation on benchmarking and specifically how to use Portfolio Manager. He said that it’s really not that hard and for individual accounts should take just a few minutes. He went through each part of the data entry of a building in Portfolio Manager and showed how a building gets an EUI score that looks at energy use per square feet. He said the program takes data from a database of all buildings in the country, normalized it for weather, uses, etc. and puts out a score. It compares your building to other buildings in the U.S.

He said that in the Seattle 2030 District they offered scoping sessions where professional went through every building and made suggestions for capital improvements. He also said that the next step after capital improvements are behavioral improvements from the people using the buildings.

He also said that his experience in Seattle was different because the City required all of the buildings to benchmark and the utilities to provide the data. There was a discussion about our preliminary contact with CMP and that we should be able to get 2 years’ worth of data quickly if each tenant requests it. Further work will need to be done with Unitil and the water district. It is possible that we could get utilities to automatically dump the data automatically but we need to work on that, which is the ultimate goal.

Drew Swenson asked if he had examples of landlords who put standard language in their leases for their tenants to share their energy usage information. Dave said not in Seattle but that is something we could do here in Portland. He has seen some leases like that.

He also said we could provide surveys to tenants eventually to obtain more detailed information to input into Portfolio Manager but for now we can use default settings. Jim O’Donnell said he didn’t think it would be a burden to ask his tenants and they won’t mind providing the information. Portfolio Manager has a form we could provide to tenants.

Dave said the default data goes back to 2003 so whatever projects have been completed since then will be credit toward reduction goals. For buildings rated over 75 which are considered Energy Star Rated, owners are eligible for special loans.

There was a discussion of the complexity regarding benchmarking and Todd from East Brown Cow expressed concern. Dave offered that Portland 2030 District will do the benchmarking and data work for our first five founding members to get things started. Jennifer added that we are working on securing an intern from USM who can help as well.

The group wanted to know the results of benchmarking and if projects are implemented. Dave said that doing projects first in common areas is easiest but there are creative ways to get tenants to sign on to doing projects through competitions, etc. Jim O’Donnell said that you do the data first and then you almost have to provide financing up front to the tenants to get them to act. If landlords can document the savings upfront on their bills and amortize it over a longer period to ensure savings, tenants will act.

Dave concluded that the biggest benefit to this exercise is that property owners and managers get together, and ask these questions collectively and come with solutions.

10:45 a.m. – 11:00 a.m. Next Steps – Mark Ouellette, Mobilize Maine
• Board Formation, Location and Staffing
• Who else needs to be involved?
• Next meeting dates- December 3\textsuperscript{rd}, 2014 March 4\textsuperscript{th}, 2015

Mark Ouellette said that the Mobilize Maine model is putting the right people in the room. This effort is private-sector led and is action-oriented. There are going to be challenges but we will figure them out.

Mark discussed that Portland 2030 District needs to form a Board of Directors in which 40\% needs to be member owners and managers. He would like to keep the Board small, no more than ten people. We plan to talk with the founding members individually and see what your interest is and time commitment is. Mark also asked who else needs to be involved and asked the founding member to think about bringing one party to the table in the future. It was agreed that at some point CMP/Unitil and the PWD will need to be involved on the data collection side. He went over the next two meeting dates December 3\textsuperscript{rd} and March 4\textsuperscript{th} and those dates seemed to work for everyone. He emphasized that we don’t want to hold meetings for no reason and think quarterly meetings will be sufficient.