



Smart Management for
Small Water Systems

Managing Energy at Your Small Drinking Water System – A Workshop Series for North Carolina Utilities

Workshop 3 – Thursday, 01/26/17

Land-of-Sky Regional Council,
Asheville, NC

Facilitators – David Tucker and
Carol Rosenfeld (UNC EFC)

This program is made possible under a
cooperative agreement with EPA.



UNC
ENVIRONMENTAL
FINANCE CENTER



Southwest
Environmental
Finance
Center



Environmental
Finance
Center
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- www.efcnetwork.org



About the Environmental Finance Center Network (EFCN)

The Environmental Finance Center Network (EFCN) is a university-based organization creating innovative solutions to the difficult how-to-pay issues of environmental protection and improvement. The EFCN works with the public and private sectors to promote sustainable environmental solutions while bolstering efforts to manage costs.

The Smart Management for Small Water Systems Program

This program is offered free of charge to all who are interested. The Project Team will conduct activities in every state, territory, and the Navajo Nation. All small drinking water systems are eligible to receive free training and technical assistance.

What We Offer

Individualized technical assistance, workshops, small group support, webinars, eLearning, online tools & resources



- **Environmental Finance Center at University of North Carolina at Chapel Hill**
- Southwest Environmental Finance Center
- Syracuse University Environmental Finance Center
- Environmental Finance Center at Wichita State University
- EFC West
- Environmental Finance Center at University of Louisville
- Great Lakes Environmental Finance Center at Cleveland State University
- New England Environmental Finance Center at University of Southern Maine
- American Water Works Association





Areas of Expertise

- Asset Management
- **Energy Management**
- Meeting Regulatory Compliance
- Fiscal Planning and Rate Setting
- Multi-funding Coordination
- Communications and Decision-making
- Water Loss Reduction
- Working with Other Water Systems
- Financing
- Funding Programs
- Managing Small Utilities in Drought

The screenshot shows a web browser window with the address bar containing efcnetwork.org. Below the address bar is a subscription form with the text "Enter your email to subscribe..." and a "Sign Me Up" button. The main header features the EFCN logo and the tagline "Innovative Finance Solutions for Environmental Services". The navigation menu includes links for HOME, ABOUT, WORKSHOPS & WEBINARS, ASSISTANCE, RESOURCES, BLOG, and ARCHIVES. A dropdown menu is open under the RESOURCES tab, listing "Resource Library", "E-Learning Modules", "Funding Sources by State" (highlighted with a yellow box and an arrow), and "Map of Water and Wastewater Rates Dashboards". The main content area has a blue background with orange text and graphics, including a person with question marks and a person sitting at a desk.

Navigating to Funding Tables

Step 1: efcnetwork.org

Step 2: Select "Funding Sources by State" under the Resources Tab



www.efcnetwork.org



UNC RURAL & SMALL TOWN FINANCE CENTER

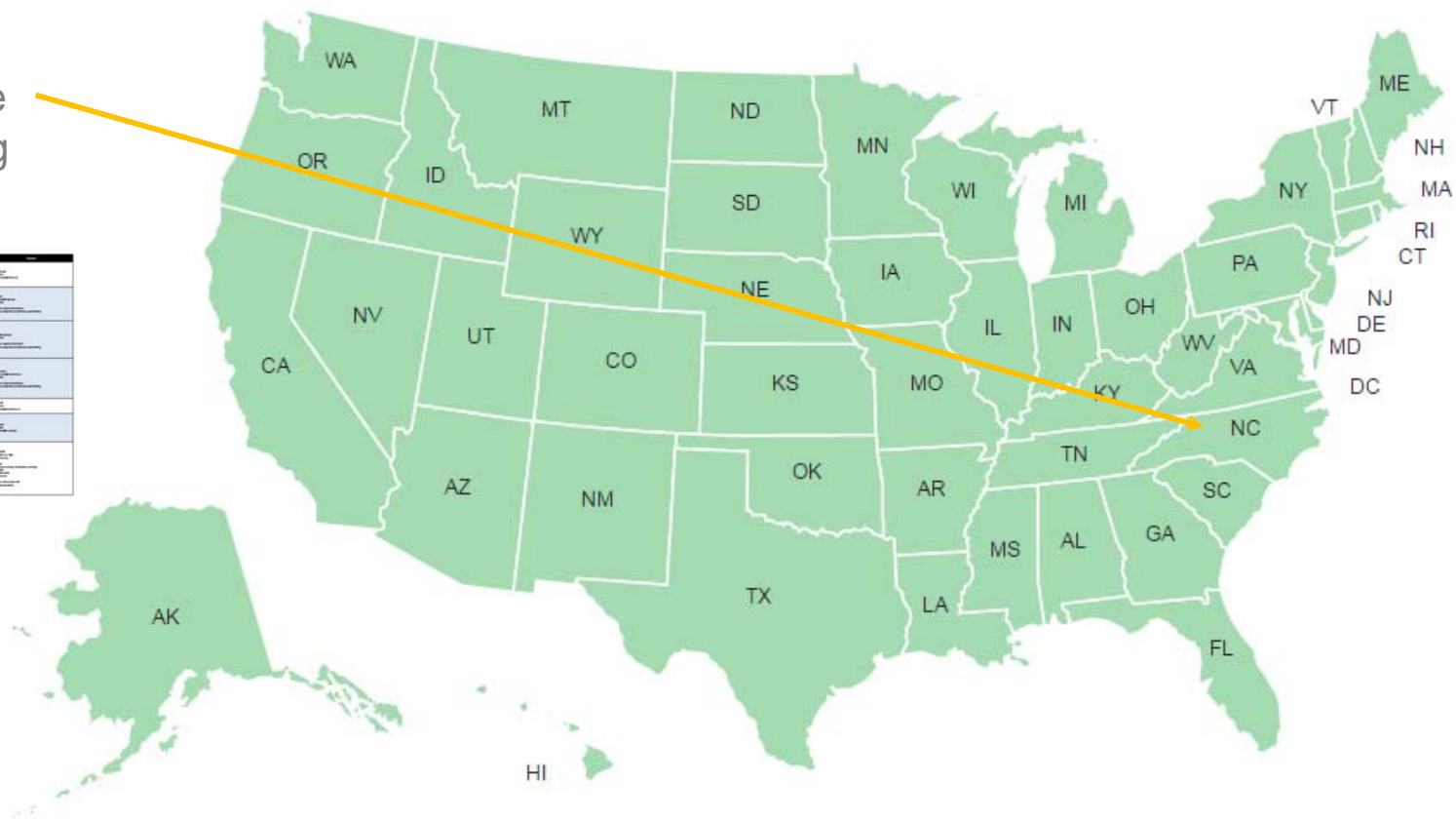
Funding Sources by State

Note: Some states may have additional resources listed below the map.

Click on the map below to view funding sources for each state:

Click on an individual state to view funding table.

Funding Source	Amount	Contact Information
State of North Carolina	\$100,000,000	John Smith, Director, Water Resources Institute
Federal Government	\$50,000,000	Jane Doe, Program Manager, EPA
Local Government	\$25,000,000	Bob Johnson, Mayor, Charlotte
Private Industry	\$15,000,000	Alice Brown, CEO, ABC Corp
Non-Profit	\$10,000,000	Charlie White, President, XYZ Foundation





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UNC SCHOOL of GOVERNMENT

Dedicated to enhancing the ability of governments and other organizations to provide environmental programs and services in fair, effective, and financially sustainable ways through:

- Applied Research
- Teaching and Outreach
- Program Design and Evaluation



How you pay for it matters



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<http://efc.sog.unc.edu>

 @EFCatUNC



Energy Management Workshop Series

- In-depth workshop focused on building system-specific energy management plans
- Aim is to create a peer network
 - Workshop 1: Collecting data and getting started
 - Workshop 2: Prioritizing and funding projects
 - Workshop 3: Implementing, progressing, and special topics



Process: Energy Management Workshop Series



Who: Dawn Nall, Southwest Environmental Finance Center

What: On-Site Level 1 Energy Assessment

Where: Your Water System



Energy Management Workshop Series



Who: Stacey Isaac Berahzer, Environmental Finance Center at UNC, Luis Adorno, NHDES; Paul Hausmann, Eversource Energy

What: One Day Workshop Covering:

- Overview of Energy Management Planning
- Review of Energy Assessments
- Understanding Energy Bill

When: Tuesday, July 19th, 2016

Where: Ashland, NH



Energy Management Workshop Series



Who: David Tucker, Environmental Finance Center at UNC;
Various speakers on financing options and VFDs

What: One Day Workshop Covering:

- Approaches to Project Prioritization
- Traditional Financing Mechanisms
- Funders Forum

When: Wednesday, August 24th, 2016

Where: Lincoln, NH



Energy Management Workshop Series



Who: David Tucker, Environmental Finance Center at UNC

What: One Day Workshop Covering:

- Special Financing Mechanisms for Energy Projects
- Maintaining Momentum
- Communication Strategies

When: Wednesday, September 28th, 2016

Where: Plymouth, NH

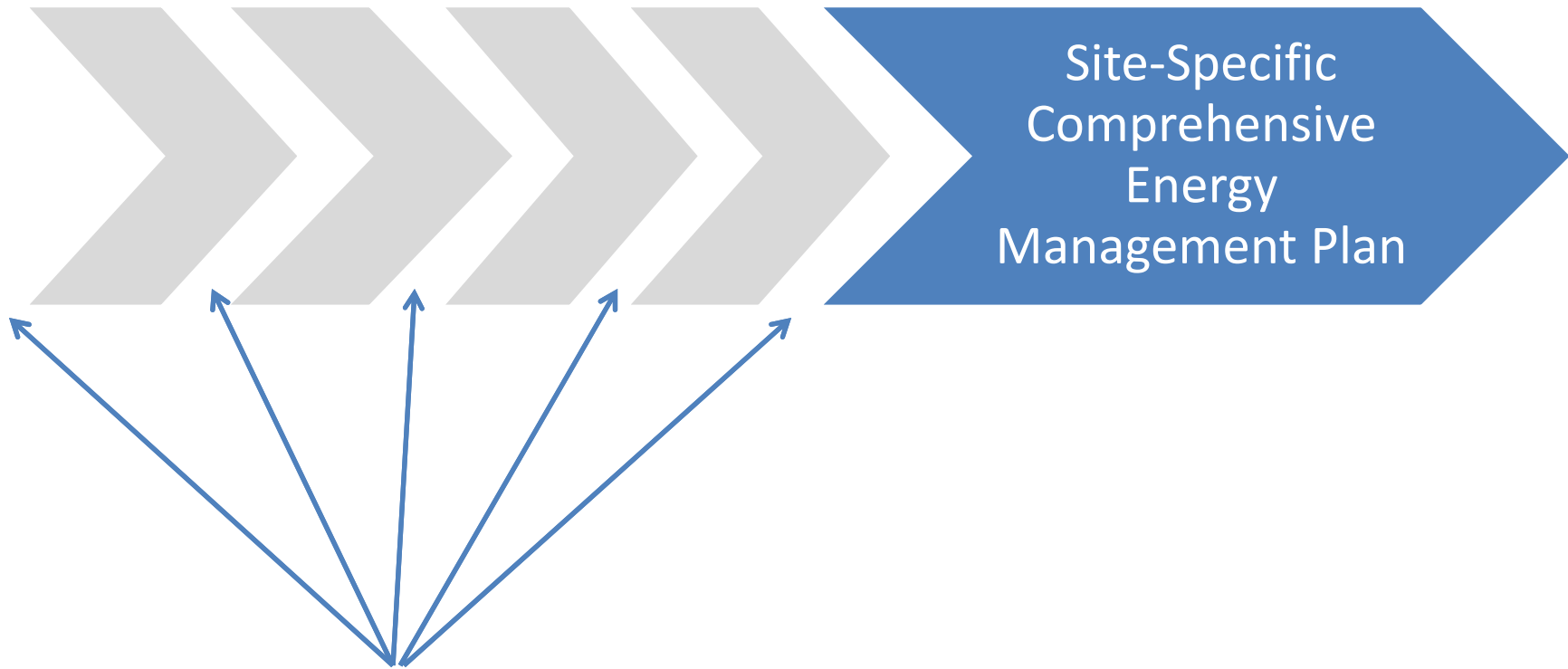


Energy Management Workshop Series





Energy Management Workshop Series



😊 Assignments between meetings 😊



Workshop 3 Agenda

Start Time	Topic
9:00	Welcome Back, Review from Workshop 2, and Questions
9:30	Presentations and Discussion on How to Prioritize and Pay for Your Projects
10:00	Developing an Implementation Plan
10:45	<i>Break</i>
11:00	Interactive Demo of the Internal Energy Revolving Fund tool
11:30	Overview of Waste Reduction Partners
12:00	<i>Lunch Break (on your own)</i>
1:00	Infrastructure: The Movie” (short video)
1:15	Overview of Duke Energy Incentives for Lighting and HVAC
2:00	Progress Tracking and Reporting
2:45	<i>Break</i>
3:00	Value of Communication / Message Mapping
3:45	Workshop Series Close-Out and Evaluations
4:00	<i>End Day</i>



Checking In and Questions

- Beech Mountain, Town of
- Canton, Town of
- Marshall, Town of
- Mayodan, Town of
- North Wilkesboro, Town of
- Robbinsville, Town of
- Wilkesboro, Town of



Checking In and Questions

- Name, organization, and role at organization
- Favorite thing about winter?
- Questions from Workshop Two, or anything from this workshop series?



Water System Presentations

- For the 3 to 5 ideas you have come up with for energy management projects, how are you thinking of prioritizing them?
 - Can be process changes, capital projects, energy rate schedule changes, etc.
- How are you thinking of paying for them?



Upcoming *Free* Webinars for Small Water Systems | Jan - Feb 2017

- Thursday, February 9, 2017, 1:00-2:00 PM ET
Communicating with the Public About Water Infrastructure | [Register](#)
- Thursday, February 16, 2017, 1:00-2:00 PM ET
Financing for the Future – Financial Longevity for Municipal Operations | [Register](#)
- For more info, go to: efcnetwork.org



2017 SOG / EFC Water and Wastewater Finance Workshop, Feb. 28 – Mar. 1

- This year's workshop will include sessions on rate setting and legal updates including the recent court decision related to impact fees.
- The session will also highlight innovative water and wastewater partnerships, and will address capital planning and capital funding sources (grants and loans).
- The workshop will be held at The Friday Center in Chapel Hill.
- Click here to register: <https://www.sog.unc.edu/courses/water-and-wastewater-finance-strategies>
- Seats are limited and the program often sells out. The program is eligible for a range of professional development credit programs – check the registration page for more details.



Energy Star, EPA, and DOE Webinars

- ENERGY STAR webinars (e.g. on Portfolio Manager):
<https://esbuildings.webex.com/mw3100/mywebex/default.do?siteurl=esbuildings>
- US EPA's Climate and Energy Resources for State, Local, and Tribal Governments:
<https://www.epa.gov/statelocalclimate>



Energy Management Program - Basic Steps

- Step 1. Establish Organizational Commitment
- Step 2. Develop a Baseline of Energy Use
- Step 3. Evaluate the System and Collect Data
- Step 4. Identify Energy Efficiency Opportunities
- Step 5. Prioritize Opportunities for Implementation
- Step 6. Develop an Implementation Plan
- Step 7. Provide for Progress Tracking and Reporting

Source: NYSERDA