



June 21, 2017

Ms. Rosemary Chiavetta, Secretary  
Pennsylvania Public Utilities Commission  
North Office Building  
P.O. Box 3265  
Harrisburg, PA 17105-3265

Re: Sustainable Development Fund of the PECO Energy service territory  
Docket No. R-00973953

Dear Secretary Chiavetta:

At its meeting on May 17, 2017, the board of the Sustainable Development Fund (“SDF”) approved the nomination of nine new board members to the SDF board. These new members are

- Alex Dews (Delaware Valley Green Building Association)
- Michael Freeman (Emerald Energy Consulting)
- Matthew Madia (Bridgeway Capital)
- Sonny Popowsky (retired)
- Richard Schlesinger (PECO)
- Christine Simeone (Kleinman Center for Energy Policy)
- Sidharth Singh (Strategic Finance Group)
- Lori Van der Voort (PWI Engineering)
- Sherif Youssef (Philadelphia Gas Works)

This election followed the board nomination process required by the SDF bylaws, including public announcements on March 3, 2017 (by letter to the parties of the PECO restructuring proceeding and the PECO/Unicom merger proceeding, email notices to the SDF email list and notice on the SDF website), interviews of the ten nominees by the SDF staff and board members (on May 2 and May 4, 2017) and the election at the SDF meeting on May 17, 2017.

The introductory letters and resumes of the nine candidates are attached and their qualifications to serve on the SDF board are summarized below.

**Alex Dews.** Since January, 2015, Alex has served as the Executive Director of the Delaware Valley Green Building Association. He is also an Adjunct Professor in the sustainable design program at Philadelphia University School of Architecture and he serves as a board member of the Chester County Economic Development Council's Smart Energy Initiative. Alex worked for five years as Policy and Program Manager at the City of Philadelphia Mayor's Office of Sustainability. Alex has a B.A. in English from the University of Vermont and a M.S. in Sustainable Design from Philadelphia University.

**Michael Freeman.** Michael cofounded Emerald Energy Consulting, LLC in 2013 and provides energy market analysis to power generation developers, transmission project developers, Regional Transmission Organizations, large retail customers, demand-response providers and electric generation suppliers. Michael is also an adjunct professor of economics at Villanova University and at Drexel University. From 1997 to 2013, Michael was a Senior Originator on the Exelon Power Team, where he was a leading voice on demand-side programs, wind, solar and other technologies of interest to SDF. Michael has a B.S. in economics from Temple University and a M.S. in energy economics from the University of Pennsylvania.

**Matthew Madia.** Matt is chief strategy and development officer at Bridgeway Capital, a community financial development institution in Pittsburgh, where he is working on building up Bridgeway's energy lending portfolio. Earlier, Matt worked as a policy analyst at OMB Watch in Washington, DC. Matthew has a B.A. in Political Science and a B.S. in Landscape Contracting from Pennsylvania State University and a M.B.A. with a focus on sustainability from Duquesne University.

**Sonny Popowsky.** Sonny worked for the Consumer Advocates Office from 1979 to 2012 and was the Consumer Advocate of Pennsylvania from 1990 to 2012. Sonny brings first-hand experience with Act 129, the Alternative Energy Portfolio Standards Act, and all other key utility issues. Sonny has a B.A. degree from Yale and a J.D. degree from the University of Pennsylvania.

**Richard Schlesinger.** Rich has worked at PECO since 1986 and currently serves as Manager of Retail Rates. Rich has been active in PECO's Act 129 program and their new Solar Collaborative. Rich has a B.S. in engineering from Widener University, a B.S. in food science from Pennsylvania State University and a M.B.A. from Saint Joseph's University.

**Christina Simeone.** Since 2014, Christina has been the Director of Policy and External Affairs at the University of Pennsylvania's Kleinman Center for Energy Policy. Before that, she was the director of the Energy Center for Enterprise and Environment at Citizens for Pennsylvania's Future, policy director at the Alliance for Climate Protection (Washington, D.C.) and special assistant for energy and climate at PA DEP. Christina has a B.A. in economics from the University of Miami, a B.S. in music industry from Drexel University and a M.S. in environmental studies from the University of Pennsylvania.

**Sidharth Singh.** Sid is cofounder and partner in the Strategic Finance Group, which focuses on small-to-mid sized sustainability projects across agriculture, energy water and waste sectors. Before

**Letter Regarding the SDF Board of Directors**  
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that, he worked for Serious Capital, Jeffries & Company, Morgan Stanley. Sid has a B.S. in bio-mechanical engineering from Columbia University.

**Lori Van der Voort.** Lori is director of energy at PWI Engineering, where she has experience working on energy issues for a wide variety of clients and settings. Lori was one of the founding board members of Council of Women in Energy and Environmental Leadership (“CWEEL”), a sub-group of the Association of Energy Engineers (“AEE”). Lori has a B.E. in mechanical engineering from the Stevens Institute of Technology.

**Sherif Youssef.** Sherif is director of major accounts, sales and marketing at Philadelphia Gas Works. He developed PGW’s long range strategic plans to grow combined-heat-and-power (“CHP”). Sherif has a B.S. in mechanical engineering from Cairo University and a M.B.A. from LaSalle University. He holds a Professional Engineer (“PE”) license in PA and DE.

One other individual submitted his nomination for the board, but the SDF board felt that the skills and perspectives of this nominee was already well represented on the board and they wanted to have an odd number of members.

Pursuant to Section II.H of our bylaws, we therefore submit to the Commission the nominations of Alex Dews, Michael Freeman, Matthew Madia, Sonny Popowsky, Richard Schlesinger, Christine Simeone, Sidharth Singh, Lori Van der Voort and Sherif Youssef to serve on the board of directors of the Sustainable Development Fund.

Please do not hesitate to contact me if you have any questions.

Sincerely,



Roger E. Clark  
Fund Manager

215.574.5814  
[roger.clark@reinvestment.com](mailto:roger.clark@reinvestment.com)

Attachment: Nominee Resumes and Cover Letters

Copies: Scott Gebhardt, TUS, PA PUC

# 1. Alex Dews

Friday, April 07, 2017

Roger E. Clark  
Reinvestment Fund / Sustainable Development Fund  
1700 Market Street - 19th Floor  
Philadelphia, PA 19103

Dear Roger,

I am writing to express my interest in serving on the Sustainable Development Fund's Board of Directors. In reviewing the board selection criteria and past work of the fund, I think I can make an important contribution and would welcome the opportunity to join SDF's work.

My professional experience aligns well with SDF's mission, and my work supporting large-scale energy conservation policies and programs from both a government and non-profit perspective will lend a unique perspective. I also bring significant board experience with several different organizations, including the Chester County Economic Development Council's Smart Energy Initiative. I look forward to discussing this opportunity further in the future and am happy to answer any questions you may have about my candidacy.

Thank you for your consideration,

A handwritten signature in black ink, appearing to read "Alex Dews", with a long, sweeping underline.

Alex Dews

Executive Director

Delaware Valley Green Building Council

## PROFESSIONAL EXPERIENCE

- 1/2015 - Present Executive Director, Delaware Valley Green Building Council  
Strategic, financial, and day to day oversight of non-profit organization focused on green building education and advocacy in Southeastern Pennsylvania and Delaware.
- 1/2010 - 1/2015 Policy and Program Manager, City of Philadelphia Mayor's Office of Sustainability  
Director of Philadelphia's Energy Benchmarking and Disclosure program and City Energy Project. Led implementation and progress reporting for *Greenworks*, the City's sustainability plan. Supported internal and external partners in developing strategic sustainability plans, metrics, and reports. Served as Liaison to City Council, as well as the Carbon Disclosure Project, C40, and ICLEI.
- 1/2011 - Present Adjunct Professor, Philadelphia University School of Architecture  
Thesis instructor in the Philadelphia University M.S. in Sustainable Design program.
- 1/2008 - 12/2009 Development Associate, Brown Schroeder & Associates, Inc.  
Supported senior partners at an executive search and development consulting firm. Researched and developed proposals, presentations and candidates for academic and not-for-profit clients.
- 9/2008 - 12/2009 Graduate Research Assistant, Philadelphia University  
Teaching assistance and curriculum support for faculty in Sustainable Design master's program.
- 1/2004 - 12/2007 Project Manager, JRA, Inc.  
Managed operations and staffing for a boutique real estate development and consulting firm. Responsible for coordinating construction management, property management, and project marketing. Completed projects totaling more than \$10 million in sales.

## VOLUNTEER ACTIVITIES

- 1/20 - Present Board Member, Southeastern Pennsylvania Smart Energy Initiative
- 9/2011 - Present Board Chair, Camphill Soltane  
Lead for strategic, legal, and fiscal oversight for a non-profit organization serving young adults with special needs based in Glenmoore, PA.
- 2/2009 - 12/2009 Sustainability Policy Intern, Philadelphia City Council  
Researched and drafted legislation focused on sustainability, while serving as internship program manager. Acted in a government relations capacity on behalf of Philadelphia University.

## EDUCATION

- 2010 Philadelphia University - M.S., Sustainable Design
- 2003 University of Vermont - B.A., English

## 2. Michael Freeman

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Michael S. Freeman  
822 Montgomery Avenue  
Suite 300  
Narberth, PA 19072  
610-667-1737 (office)  
610-937-5625 (cell)

March 27, 2017

Roger E. Clark  
Manager, Sustainable Development Fund  
Reinvestment Fund / Sustainable Development Fund  
1700 Market Street - 19th Floor  
Philadelphia, PA 19103

*Via email: roger.clark@reinvestment.com*

Dear Roger,

I would like to be considered for nomination to the SDF board, and I appreciate the opportunity to participate in the process. I think I could provide a useful perspective to the Board based on my experience as a longtime originator at Exelon Generation Company and now as an independent consultant.

I have an extensive track record in transactions, analysis, strategy, energy product development, contracts, settlements and operations with respect to renewable energy, demand response and energy efficiency applications. From 1997 until leaving Exelon in 2013, I played a major role in the development of the corporation's renewable energy portfolio, including:

- The 2010 acquisition of John Deere Renewables (now Exelon Wind)
- The 2011 acquisition of the (240 MW) Antelope Valley solar plant in California
- The 2009 construction of a 10 MW solar PV resource in Chicago
- Beginning in 2001, the first four transmission-level wind resource projects in PJM
- Beginning in 2007, the first transmission-level solar PV projects in PJM
- In 1998, development and execution of the first renewable energy credit transaction in PJM
- Significant assistance to PJM-EIS in the development of PJM GATS
- Participation in the drafting of the Pennsylvania AEPS law (I was part of a small industry group that provided policy and technology guidance to the sponsoring legislators)
- Participation in the development of a national RPS law (I was asked to provide policy guidance to the staff economist of the U.S. Senate Committee on Energy and Natural Resources)
- Development of numerous business cases for the consideration of Exelon senior management, including the acquisition of Enron Wind (rejected), a joint venture with General Motors to initiate a pilot electric vehicle project (also rejected), a collaboration with demand response providers to offer a new, hourly call option product (accepted), participation in load auctions (accepted), and several innovations in the methodology used to financially model intermittent resources (accepted and still used)

I only mention my experience in advocating for a wide range of concepts and projects because my understanding is that the SDF Board is responsible for evaluating a wide range of concepts and projects – for market feasibility, financial assumptions and calculations, technology assumptions and other considerations. Having been on the other side many, many times (and learning how, along the way, to be more effective in communicating why my ideas made perfect sense . . . even those that got shot down!), I think I am adept at spotting weaknesses and strengths in financial models and input assumptions. Also, I believe a markets perspective can be quite valuable in the evaluation.

The majority of my origination work at Exelon was not renewable energy-related, but I had (and have) a strong interest in trying to make renewable energy work commercially. In fact, I have always maintained that the greatest chance for sustainability will be the valuation and integration of renewable energy and demand management as *physical* resources, just like anything else in the sense of system reliability.

As an originator, my responsibility was to improve Exelon's supply and demand positions, working with traders and portfolio management. This was applicable to both supply and load. On the load side, for example, I was wholesale power marketing's representative on the design team for the Illinois load auction, and I was the commercial leader for Exelon's participation in load auctions there and in New Jersey, Pennsylvania and Ohio.

I wanted to highlight one other aspect of my career: my experience at Philadelphia Electric/PECO Energy before I transferred to wholesale power marketing in 1997. I was hired in 1991 to design and analyze demand side management programs. DSM of course never got off the ground in Pennsylvania, but we did manage to launch DSM programs in Maryland for the Conowingo Power Company, which PECO owned at the time. I was right in the middle of that work, and I also led the successful revamping of PECO's Large Interruptible Load Rider ("LILR") in 1995. I was the lead (and only) technical witness in that case.

After my work on the LILR, I transferred to PECO's electric rates department to assist in the company's restructuring filing. I was part of a team that worked on the rate design, IT and operations development of retail choice, and I was a technical witness in the case. After I went to the wholesale side, I developed, analyzed and sold wholesale energy products to the competitive retail market, and I worked on the unforced capacity sale provision and other aspects of the PECO-Unicom merger settlement.

As an independent consultant, I have worked for merchant generation and transmission developers, large retail customers, demand response providers, an RTO and competitive retail suppliers. Most of the work falls under a general category of "market analysis," which usually means supply and/or demand asset valuation in the wholesale markets, but can also mean energy procurement strategy and execution for retail load; contract structure guidance for generators and load; and energy and capacity product valuation for equity funds that are considering asset acquisition.

Should I be selected as a Board member, there may be instances when I have to recuse myself from Board discussions – though overlap between my clients and those associated with the SDF is highly unlikely, judging from information in SDF annual reports.

One of the advantages of consulting is the opportunity to hear about, read about and talk about many different types of projects and ideas. Keeping an open mind is an absolute necessity for a consultant. In that regard I think I can help bring potential projects into SDF's pipeline, or at least put ideas in front of the appropriate people. And I pride myself on being known as someone who generates ideas and is willing to look at things in new ways.

Thank you for considering my application. And last but not least:

I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any current criminal investigations.

Kind regards,

A handwritten signature in cursive script, appearing to read "Mike", written in dark ink.

Michael S. Freeman

**Attachment: resume of Michael S. Freeman**

# MICHAEL S. FREEMAN

822 Montgomery Avenue  
Suite 300  
Narberth, PA 19072  
Email: michael.freeman@emeraldenergyconsulting.com

Phone: +1 610 667 1737

Fax: +1 866 241 0010

LinkedIn: <http://www.linkedin.com/in/michaelfreeman/>

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## SUMMARY

Longtime originator in wholesale power marketing; known as creative problem-solver, new product developer and “deal closer.” One of the people Exelon management often turned to for execution of complex transactions.

## PROFESSIONAL HIGHLIGHTS

### EMERALD ENERGY CONSULTING, LLC

#### *Partner and Co-Founder*

2013

- **Generation (solar, wind, biomass, conventional) developers** – regulatory impact and positioning strategy; off-take PPA valuation, marketing and negotiation; acquisition strategy development
- **Large retail customers** – supply portfolio planning and execution; renewable energy investment evaluation; cogeneration contract structuring; sub-tenant billing and rate design; regulatory tracking
- **Municipal utilities** – renewable energy planning; net-metering tariff design and strategy
- **Retail suppliers** - retail pricing tool; price-to-compare tracking and forecasting
- **RTO/ISOs** - state tariff evaluation, federal vs. state jurisdictional evaluation
- **Demand response providers** – executive and sales force market training, transaction brokering, software development
- **Private equity** – New market education; acquisition valuation
- **Transmission developers** - capital investment evaluation; new market entry decision making
- **Foreign utilities** – U.S. market interpretation and comparison

CONSTELLATION • Baltimore, MD

EXELON POWER TEAM • Kennett Square, PA

#### *Senior Originator*

1997-13

- Responsible for assisting trading and portfolio management in meeting hedging goals by originating sales and purchases with generation companies, vertically integrated utilities, power marketing companies, public power and competitive retail suppliers
- Responsible for originating purchases from power generation assets, including conventional and non-conventional technologies
- Originated, negotiated and closed hundreds of structured and standard energy and capacity transactions

## SELECTED PROJECTS

- 2012: Trade Floor integration with Constellation (significant contributor)
- 2011: Acquisition of large-scale solar project in California (significant contributor)
- 2010: Keystone Solar Project (commercial lead)
- 2010: Acquisition of John Deere Renewables (significant contributor)
- 2009: Development of largest urban solar plant (commercial lead)
- 2008: Acquisition of large wind power purchase agreement, Com Ed transmission zone (commercial lead)
- 2007: First large-scale solar project in PJM (commercial lead)
- 2006: Illinois Auction participation (commercial lead)
- 2004-05: Illinois Load Auction design team (significant contributor)

# MICHAEL S. FREEMAN

822 Montgomery Avenue  
Suite 300  
Narberth, PA 19072  
Email: michael.freeman@emeraldenergyconsulting.com

Phone: +1 610 667 1737

Fax: +1 866 241 0010

LinkedIn: <http://www.linkedin.com/in/michaelfreeman/>

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- 2002: Development of load-following energy valuation model (commercial lead), and execution of first load-following deal in PJM (commercial lead)
- 2001-03: First four wind power purchase agreements in PJM (commercial lead)
- 1999-2000: Integration with Unicom (significant contributor)
- 1998-99: Completion of first non-PJM power purchase agreement (Midland Cogeneration, Michigan, commercial lead)
- 1998: First renewable energy certificate trade in PJM (commercial lead)
- 1998: First power purchase agreement with landfill generation in PJM (commercial lead)

## PECO ENERGY • Philadelphia, PA

1992-97

### *Marketing Analyst*

- 1996-97: Development of retail choice structure for PECO Energy (significant contributor and technical witness)
- 1996: Development of interruptible rate design for large industrial customers (commercial lead and lead witness)
- 1995: Development of marginal cost pricing for large industrial customers, PECO Energy (commercial lead)
- 1994: Development of demand-side management plan for Conowingo Power Company, Elkton, MD (significant contributor)
- 1993: Development of marginal cost model for PECO's electric heat pump program

## VILLANOVA UNIVERSITY • Villanova, PA

- 2014-present: Adjunct professor of Economics

## DREXEL UNIVERSITY • Philadelphia, PA

- 2014-present: Adjunct professor of Biodiversity, Earth & Environmental Science

## PROFESSIONAL AWARDS

- PennFuture, "Green Power Award," 2008 and 2005 (shared with MESA Environmental Sciences, Inc.)
- American Wind Energy Association, "Market Maker Award," 2002 (on behalf of Exelon Power Team)
- PECO Energy, "President's Award," 1996 (development of interruptible electric rate); 1995 (contribution to margin model); 1994 (Spectrum II HVAC project)

## EDUCATION

- MS Energy Economics (minor in Statistics), University of Pennsylvania
- BS, Economics, Temple University

## OTHER COURSEWORK

- Quantitative Methods, Princeton Energy Group, 2000
- Power Distribution Systems, Philadelphia Electrical Society, 1999
- Applied Calculus, Villanova University, 1998-99

## MICHAEL S. FREEMAN

822 Montgomery Avenue  
Suite 300  
Narberth, PA 19072

Phone: +1 610 667 1737

Fax: +1 866 241 0010

Email: [michael.freeman@emeraldenergyconsulting.com](mailto:michael.freeman@emeraldenergyconsulting.com)    [LinkedIn: http://www.linkedin.com/in/michaelfreeman/](http://www.linkedin.com/in/michaelfreeman/)

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- Programming in Visual Basic, PECO Energy, 1996
- Engineering Economics, PECO Energy, 1995

### **EMERALD ENERGY CONSULTING, LLC, WEBSITE**

<https://www.emeraldenergyconsulting.com/>

### 3. Matthew Madia

Matt Madia  
Chief Strategy and Development Officer  
Bridgeway Capital  
707 Grant St., Suite 1920  
Pittsburgh, PA 15219

April 7, 2017

Roger Clark  
Director, Clean Energy  
Reinvestment Fund  
1700 Market Street – 19th Floor  
Philadelphia, PA 19103-3904

Dear Roger,

Thank you for considering me for a seat on the Board of the Sustainable Development Fund. The Fund has an impressive track record of making high-impact investments in energy efficiency and alternative generation projects. I would be pleased to serve on the Board and support your important work.

I have devoted my career to issues of social and environmental justice and would bring a variety of skills to the Fund. I have experience in environmental policy, sustainable development, nonprofit fundraising and communications, and community development deal structuring. I pride myself on my ability to balance a vision for a more equitable and sustainable future with a pragmatic, results-oriented approach to decision-making. I am also a strong strategic thinker and believe I could help the Fund in pursuit of its goals.

As a Board member, I would commit myself to applying creativity to the Fund's decision-making and agenda setting. In my experience I have found that mission-driven investing is often about finding creative solutions in the face of complex transactions. I would hope to work with you to accelerate investing and, in turn, increase impact.

I look forward to further discussing the open Board positions and the future direction of the Sustainable Development Fund.

Sincerely,



Matt Madia

# Matthew R. Madia

130 44th Street, Pittsburgh, PA 15201  
(412) 779-9498 - mr.madia@gmail.com

## PROFESSIONAL EXPERIENCE

**Chief Strategy and Development Officer**, Bridgeway Capital, Pittsburgh, PA February 2014 – present  
(Development Director from February 2014 – December 2015)

- Work with CEO and Board of Directors to identify key drivers for future direction of the organization, to set a strategic agenda, and to oversee implementation
- Identify unmet market demand for mission-driven investment and develop new lending and service programs in response; Oversee asset-liability management for existing investments at the program level
- Write grant proposals to foundations and state and federal agencies; Manage relationships with existing funder and develop new opportunities; Work with banks to raise borrowed capital
- Capitalize the organization's rapidly growing community development portfolio of commercial real estate, multi-unit residential, and community services loans
- Report to funders and other key stakeholders on lending activity, business education services, and community development; Analyze data on social impact, such as job creation, economic mobility, and minority-ownership

**Credit Analyst**, Bridgeway Capital, Pittsburgh, PA August 2012 – February 2014

- Underwrote to assure the financial health, debt repayment ability, personal credit, and collateral support of new credits
- Strengthened credit and social impact policies for Aeris – a third-party ratings agency for the CDFI industry
- Conducted portfolio-level credit reviews for past performance and predictive indicators; Recommended adjustments to improve alignment of credit risk with loans' risk ratings and the portfolio's loan loss reserve

**Federal Regulatory Policy Analyst**, OMB Watch, Washington, D.C. December 2006 – June 2011

- Led advocacy campaigns to achieve greater transparency and public participation in the regulatory process; Organized diverse coalitions of labor unions, environmental groups, and other public interest advocates around regulatory issues; Chaired coalition meetings and shaped group strategy; Drafted and distributed research and analysis
- Built and managed relationships with U.S. Congressional offices, White House officials, and federal agencies; Lobbied on behalf of the organization, presented policy positions to high-level officials, and coordinated strategy with allies
- Composed articles, reports, blog posts, and congressional testimony on behalf of the organization, including occasional opinion pieces published on *The Huffington Post*;
- Became a recognized expert in federal regulatory policy, leading to appearances on television and radio and in print news, including NBC Nightly News, CNN, National Public Radio, and *The Washington Post*

## EDUCATION

**MBA, Sustainability Concentration**, Duquesne University July 2012

- Learned core business competencies including financial decision-making, accounting, marketing, and strategy
- Practiced and studied leading edge theories and techniques that better account for the full social, environmental, and financial impacts of business decisions
- Engaged local organizations, including H.J. Heinz Co., PPG Industries, and Pennsylvania Environmental Council, in student-run consulting projects that recommended solutions to their most pressing sustainability challenges

**BA, Political Science**, Pennsylvania State University May 2006

**BS, Landscape Contracting**, Pennsylvania State University May 2006

Minor in History

## ACHIEVEMENTS, SKILLS, PUBLICATIONS, AND AFFILIATIONS

- Board of Directors, YMCA of Greater Pittsburgh, Homewood-Brushton branch
- Beta Gamma Sigma member (international honor society for business school students) with a 3.86 GPA
- Graduate, with honors, of the 2013 Pennsylvania Bankers Association School of Commercial Lending
- W. Spangler, R. Sroufe, M. Madia, J. Singadivakkam, "Sustainability-Focused Knowledge Management in a Global Enterprise," *Journal of Computer Information Systems* (55:1), 2014, 70-82.
- Invited guest lecturer, Georgetown University Public Policy Institute and Carnegie Mellon University Heinz College

## 4. Sonny Popowsky

### Roger Clark

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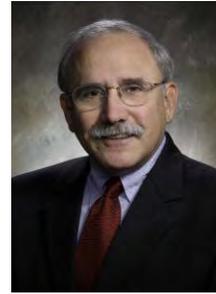
**From:** spopowsky@gmail.com  
**Sent:** Tuesday, April 04, 2017 10:42 AM  
**To:** Roger Clark  
**Subject:** RE: Request for your service on the SDF board of directors - nomination due Friday, April 7, at noon  
**Attachments:** Biographical Sketch of Sonny Popowsky -----.docx

Thank you Roger. I would be pleased to be considered for a position on the Board of the Sustainable Development Fund. As set forth in the attached bio, I have many years of experience in the Pennsylvania energy field, with a particular emphasis on the needs of utility consumers. I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any current criminal investigations.

Sonny Popowsky  
4240 Osage Avenue  
Philadelphia, PA 19104

Cell Phone: 215-279-2915  
E-mail: [spopowsky@gmail.com](mailto:spopowsky@gmail.com)

## Biographical Sketch of Sonny Popowsky



Sonny Popowsky served as the Consumer Advocate of Pennsylvania from 1990 to 2012. He started his career at the Office of Consumer Advocate (OCA) as an Assistant Consumer Advocate in 1979. He served as the President of the National Association of State Utility Consumer Advocates (NASUCA) from 1996 to 1998 and was previously Chairman of the NASUCA Electric Committee. He served on the Board of Trustees of the North American Electric Reliability Council (NERC) from 1997 to 2001 and the NERC Stakeholders Committee from 2001 to 2006. In 2010, Mr. Popowsky was appointed by Secretary of Energy Steven Chu to the Department of Energy's Electricity Advisory Committee and served as Vice Chair of that Committee from 2012 to 2016. Mr. Popowsky currently serves on the Executive Committee of the Advisory Council to the Electric Power Research Institute, the City of Philadelphia Water, Sewer and Storm Water Rate Board, the Board of Directors and Executive Committee of the Energy Coordinating Agency of Philadelphia, the Executive Council of the Pennsylvania AARP, the Board of Directors of Regional Housing Legal Services, the External Advisory Board of the Kleinman Center for Energy Policy at the University of Pennsylvania, and as a pro bono member of the Certification Decision Committee of the Center for Sustainable Shale Development. In 1988, he briefed and argued the United States Supreme Court case of *Duquesne Light Company v. Barasch*, in which the Court upheld the position of the OCA that two Pennsylvania electric utilities had no constitutional right to charge consumers for the costs of four cancelled nuclear power plants. Mr. Popowsky graduated Cum Laude from Yale University and received his J.D. Cum Laude from the University of Pennsylvania, where he was an Associate Editor of the Law Review and was elected to the Order of the Coif. Between college and law school, Mr. Popowsky worked as a newspaper reporter for the Press of Atlantic City, New Jersey. Prior to joining the OCA, he was an Associate at the Philadelphia law firm of Pepper, Hamilton and Scheetz from 1977-1979.

4240 Osage Avenue  
Philadelphia PA 19104

[spopowsky@gmail.com](mailto:spopowsky@gmail.com)  
(215)279-2915

## 5. Rich Schlesinger

### Roger Clark

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**From:** Jiruska, Frank J:(PECO) <frank.jiruska@exeloncorp.com>  
**Sent:** Tuesday, March 28, 2017 1:41 PM  
**To:** Roger Clark  
**Subject:** RE: Sustainable Development Fund is seeking new board members - nominations due April 7  
**Attachments:** Richard Schlesinger 2017 resume1.docx

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

Roger

I am sending this letter to officially nominate Richard Schlesinger for a board position. Rich has been an employee of PECO for many years and has deep knowledge of many technologies and energy efficiency practices across both residential and commercial applications. Rich has strong knowledge of solar applications and understands the technology from both a utility and customer perspective.

Rich would be a strong addition to the board and I recommend him highly for consideration. I have attached a copy of his resume.

Please let me know if this is sufficient or if you would prefer this be placed on my letterhead.

Thanks

Frank

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# Richard A. Schlesinger

111 Colwyn Terrace

Lansdale, PA 19446

215-519-7609 | rich.schlesinger@peco-energy.com

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## SUMMARY STATEMENT

- Accomplished regulatory professional who possesses extensive management, technical, financial, strategic and project management background.
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## PROFESSIONAL EXPERIENCE

- **PECO Energy Company**, Philadelphia, PA

- **Manager Retail Rates**

*December 2010 – Present*

- Manages a team of seven professionals in conducting regulatory projects and overseeing electric and gas tariffs.
- Key interface with the PAPUC on electric and gas rate and tariff issues.
- Responsible for the timely and accurate submission of over 150 filings and reports annually to the PAPUC.
- Tariff witness for PECO's 2015 electric distribution rate case, developing testimony and exhibits.
- Regulatory lead and cost witness for PECO's 2013 and 2016 Energy Efficiency & Conservation Plans (EE&C). Developed testimony and exhibits to support cost allocation/ pricing. Testified in front of the PAPUC to defend the cost recovery portion of the plan.
- Regulatory lead for PECO's Solar Collaborative, developing strategies to ensure rules that are equitable to all stakeholders. Assisting in the improvement and redesign of several of PECO's internal distributed generation processes.

- **Principal Regulatory & Rates Specialist**

*December 2005 – December 2010*

- Supported the preparation of testimony and exhibits for PECO's 2010 gas and electric distribution rate case filings.
- Co-project lead for the 2007 PAPUC Management & Operations Audit and the 2009 Management Efficiency Investigation, leading a core team of five employees and a broader team of over 40 subject matter experts to support data requests, interviews and field visits.
- Regulatory lead and cost witness for PECO's 2009 EE&C Plan. Developed testimony and exhibits supporting cost allocation and pricing to ensure proper cost recovery.

- **Senior Rate Specialist/Senior Rate Engineer**

*February 2004 – December 2005*

- Coordinated and prepared regulatory filings for both the gas/electric business.
- Testified as a Company witness as part of litigated PAPUC proceedings.
- Leveraged expert knowledge of the electric and gas tariffs to analyze and address business issues raised by internal and external stakeholders.
- Performed financial analysis to support various regulatory and finance projects.

- **E-Commerce Manager/Project Manager**

*September 2000 – February 2004*

- Managed the design, development and implementation of e-Commerce strategies, products and services to enhance customer satisfaction and sustain PECO's competitive position.
- Was the lead interface for IT projects for Customer & Marketing Services that ranged in size and scope from several thousand to several million dollars in costs.
- Managed two employees in the performance of various IT projects, provided supervision/coaching and conducted performance reviews.

- **Project Manager, Customer Choice Implementation** **September 1997 – September 2000**
    - Responsible for planning and implementing changes required for PECO's transition to the competitive electric and gas markets.
    - Managed the Customer Choice Implementation Team and represented PECO's strategic position as part of the Pennsylvania Electric Association's and the PAPUC's Pilot & Phase-In Committees. Areas of focus included: unbundled rates, electric/gas tariffs, regulatory issues, information systems redesign (billing and bill print) and default service.
  - **Rates Engineer** **September 1992 – September 1997**
    - Responsible for the design and modification of innovative energy tariff rates.
    - Subject matter expert for state mandated restructuring of PECO's electric business.
    - Provided electric/gas tariff interpretations, bill analysis, rate calculations and training for internal and external stakeholders.
    - Testified before the PAPUC as part of customer complaint proceedings.
  - **Technical Monitor** **July 1991 – September 1992**
    - Provided corrective actions and ensured implementation of identified quality deficiencies in programs, procedures and operating practices.
  - **Shift Technical Advisor** **May 1988 – July 1991**
    - Provided technical expertise to engineering and operations staff during normal plant operations and during equipment troubleshooting and testing.
    - Monitored critical reactor parameters and verified safety system actuation during transients.
  - **Systems Engineer** **June 1986 – May 1988**
    - Solved technical and operational problems involving electrical distribution and power generation systems.
  - **Lehigh Valley Farms, Allentown, PA**
    - **Quality Control Supervisor** **1983**
      - Directed lab technicians in the performance and evaluation of quality and sanitary testing of dairy products.
  - **Pet Incorporated, Greeneville, TN**
    - **Production Supervisor** **1982**
      - Supervised 20 employees in the manufacture and quality control of evaporated milk, ice cream, taco shells and nacho chips.
- 

#### CERTIFICATIONS/MEMBERSHIPS

- Institute of Electrical and Electronics Engineers (IEEE)
  - Shift Technical Advisor Nuclear Certificate
  - The Penn State Alumni Association – Life Member
- 

#### EDUCATION

- SAINT JOSEPH'S UNIVERSITY, Philadelphia, PA  
*Masters of Business Administration*, 1995
- WIDENER UNIVERSITY, Chester, PA  
*Bachelor of Science in Engineering*, 1986
- Pennsylvania State University – University Park, PA  
*Bachelor of Science in Food Science*, 1981

## 6. Christina Simeone



April 4, 2017

Roger E. Clark  
Reinvestment Fund/Sustainable Development Fund  
1700 Market Street, 19<sup>th</sup> Floor  
Philadelphia, PA 19103

Re: Board Nomination

Please allow this letter and attached resume to serve as my request to be considered for nomination to the Sustainable Development Fund's (SDF) Board of Directors.

I believe my background demonstrates competency in the stated qualification criteria for Board, including knowledge of clean energy policies, project finance needs, and market opportunities, as well as experience with Pennsylvania policy relevant to electric utilities, efficiency, and renewables.

I have experience in the regulatory, environmental advocacy, and academic sectors, all with a focus on the intersection between energy and the environment. I also have private sector experience in environmental consulting and financial management.

I look forward to the opportunity to contribute my time and knowledge to advance the goals of the SDF.

I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any current criminal investigations.

Sincerely,

Christina Simeone  
**Director of Policy and External Affairs**  
csimeone@upenn.edu

# CHRISTINA E. SIMEONE

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838 Lombard Street • Philadelphia, PA 19147 • (267) 997-7257 • christina.e.simeone@gmail.com

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## **University of Pennsylvania's Kleinman Center for Energy Policy**

**Philadelphia, PA**

Director of Policy and External Affairs

November 2014 - Present

- Publish original reports and blogs on a wide range of applied energy policy topics.
- Lead the Center's energy policy activities and interactions with external (off-campus) entities.
- Maintain ongoing expertise in wholesale and retail electricity policy, commodity market movements, nuclear energy policy, significant local, state and federal energy policy trends, and electricity-related technology developments.
- Facilitate multi-stakeholder proceedings on energy policy topics.
- Collaborate with Penn faculty, students, and other centers on original energy research topics.
- Explain and promote publications to media and policymakers.

## **Citizens for Pennsylvania's Future (PennFuture)**

**Philadelphia, PA**

Director of Energy Center for Enterprise and Environment

May 2011 - October 2014

- Guided the strategic direction of PennFuture's clean energy policy goals and priorities.
- Frequently provided legislative language, amendments, policy analysis, recommendations, and testimony to legislators.
- Maintained expertise in a wide range of topics, including: electric and natural gas utility policy, renewable energy markets, alternative transportation fuels, energy efficiency and renewable energy policy, competitive electricity markets, and other areas.
- Served as organizational lead on PJM Interconnection issues.
- Organized and promoted clean energy business interests related to state and federal policies.
- Regularly communicated with the press on energy related matters.
- Managed Center staff, grant programs, and key projects. Secured several hundreds of thousands of dollars of environmental and energy related grant funding.

## **Alliance for Climate Protection**

**Washington, DC**

Policy Director

August 2009 - April 2011

- Analyzed federal climate change and energy-related legislation and regulations.
- Identified concerns and recommended changes to legislative and regulatory proposals.
- Developed policy recommendations for legislators.
- Approved of policy related statements made publicly by the organization's Repower America campaign (via TV, radio and print media).
- Performed research and managed projects related to climate change and energy policy.
- Managed staff of 3-7 people working in policy and research projects and analysis.
- Represented the Alliance in national and international meetings and conferences.

## **Pennsylvania Department of Environmental Protection (DEP)**

**Harrisburg, PA**

Special Assistant for Energy and Climate

February 2009 - July 2009

- Assisted and advised DEP's Secretary on matters related to energy and climate change.
- Communicated with state legislators regarding energy and climate legislation and policies.
- Assisted in developing and drafting legislative language.
- Analyzed legislative proposals and amendments to inform the Secretary and the Governor's Office.
- Prepared presentations, research and testimony for the Secretary's public speaking engagements and legislative hearings.
- Developed or coordinated special energy and climate projects, including Recovery Act programs.

Executive Policy Specialist (Climate and Energy)

April 2007-January 2009

- Co-managed the Climate Change Advisory Committee process.

- Performed technical analysis and quality control on proposed greenhouse gas reduction initiatives and drafted emissions inventories and projections.
- Coordinated agency-wide comments on proposed federal climate change regulations.
- Attended and spoke at international, national, state, and local conferences as a representative of the Commonwealth of Pennsylvania.
- Researched special projects for the Governor's Policy Office and the DEP Secretary.
- Reviewed and edited proposed regulations and technical guidance documents.
- Additional areas of focus included: mineral resources (coal mining, mining reclamation, oil & gas drilling) and radiation protection.

**ALC Environmental Incorporated**

**Philadelphia, PA**

Compliance Officer

June 2005 – April 2007

- Reviewed current and historic lead-based paint reports for federal, state, and local compliance per an EPA consent agreement.

Project Manager

- Managed and completed 'requests for proposals' documentation for federal, state, and local competitive bids, as well as commercial vendor pre-qualification applications.

*Additional work experience in financial asset management and music industries.  
Information available upon request.*

**EDUCATION**

**University of Pennsylvania**

Philadelphia, PA

Master of Environmental Studies (Master of Science)

Sept 2004 – August 2006

- GPA 3.9

**Drexel University**

Philadelphia, PA

Bachelor of Science

January 2003 – May 2004

Music Industry - majored in vocal performance (opera), minored in piano performance

- Summa Cum Laude

**University of Miami**

Coral Gables, FL

Bachelor of Arts

December 1999

Majored in Economics, Minored in Business Administration

- GPA in major 3.8, Cum Laude, Dean's List, Provost Honor Roll, Golden Key National Honor Society

**Recent Publications**

- A Case Study of Electricity Competition Results in Pennsylvania, October 28, 2016 (Kleinman Center)
- Nuclear Decommissioning: Paying More for Greater Uncompensated Risks, August 8, 2016 (Kleinman Center)
- Philadelphia Gas Works' LNG Expansion Efforts: A Guide to Understanding and Evaluating Project Benefits and Risks, June 29, 2016 (Kleinman Center)
- Rate Decoupling and Economic and Design Considerations, June 6, 2016 (Kleinman Center)

**Selected Boards and Activities**

- Member of University of Pennsylvania's Advisory Committee to the Masters of Environmental Studies and Applied Geosciences Programs
- Member of the Board of Directors, Simeone Automotive Foundation Museum
- Co-chaired Governor Wolf's transition team for the Pennsylvania Department of Environmental Protection.
- Former member of the Board of Directors, Eastern Pennsylvania Association for Clean Transportation (U.S. DOE sponsored organization) (2013 – 2015)

- Former member of Climate Change Advisory Committee to the Pennsylvania Department of Environmental Protection (2012 - 2016, Chair from 2012 - 2014)
- Former member of the Board of Directors, Pace Controls, LLC (a clean tech startup company) (2012 - 2014)
- Former member of the Board of Directors, Mid-Atlantic Renewable Energy Council (MAREC) (2012-2014)
- Philadelphia Business Journal's 2012 "Who's Who in Energy"
- European Union Visitor's Program awardee. Nominated to the program by Governor Edward G. Rendell and selected by the EU Commission (2010)

## 7. Sidharth Singh

Sidharth Singh  
265 Upper Gulph Road  
Radnor, PA 19087-2414

Roger E. Clark  
Reinvestment Fund / Sustainable Development Fund  
1700 Market Street - 19th Floor  
Philadelphia, PA 19103

April 3, 2017

Dear Roger:

Please find this letter and the enclosed résumé as a nomination of myself for consideration to join the Sustainable Development Fund (SDF) Board of Directors. My professional experience in clean/renewable energy, finance background, and personal desire as a PECO customer to promote energy conservation make me a strong candidate for this position.

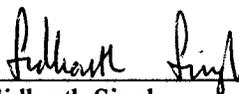
For the past 6 years, I have exclusively focused on the development and financing of small-to-mid sized sustainability projects across the Agriculture, Energy, Water, and Waste sectors. During this period, I approached the Reinvestment Fund on several occasions and successfully closed two debt financings: \$1.5M for a greenhouse farm in Yardley and \$600k for a combined heat and power (CHP) system in Philadelphia. With respect to the former, I was the finance lead for the developer and was involved in structuring, negotiating, and closing both a deal with the Reinvestment Fund and with a private equity source for the remaining capital needs. Regarding the CHP project, I was the developer and created commercial agreements with the building owner that the Reinvestment Fund deemed financeable during underwriting. I successfully worked with PECO to interconnect this clean energy generation project to its grid.

On the investment side, I worked for two private equity firms focused on generating market-rate, risk-adjusted returns for sustainable projects with low technology risk and predictable, long-term cash flows. Most recently, I was part of the founding team of Ultra Capital, a sustainable real asset investor based in San Francisco, where I developed their underwriting process and metrics, sourced transactions, and engaged with investors. While at Clean Feet Investors, a \$25M fund, I structured and closed a \$5M project finance facility for an energy storage company based in San Francisco.

My experience developing and financing projects in PECO territory was enhanced by hands-on organizations like the Reinvestment Fund where principals helped identify additional sources of capital and navigate utility programs. Project developers face many challenges, including risk mitigation, utility and government approvals, and identifying appropriate capital sources. Organizations like SDF play a critical supporting role for clean energy projects by offering guidance as well as capital. If selected to join the Board, I would look to enhance both of these offerings to facilitate a greater volume of sustainable transactions completed in the PECO Energy service territory. Thank you for your time and consideration.

*I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any current criminal investigations.*

Sincerely,

  
\_\_\_\_\_  
Sidharth Singh

**EXPERIENCE: ENERGY, INFRASTRUCTURE, AND ARGICULTURE FINANCE**

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- 4/12-Present **Strategic Finance Group** Radnor, PA  
*Infrastructure Development and Finance*
- Representative Clients**
- Solar Power Generation System Developer (1/16-Present)* Boise, ID
- CFO, raising corporate equity, debt, and project finance capital for financed lighting pole solar offering
- Multi-family Building Owner (7/14-Present)* Philadelphia, PA
- Design, build, own, and operate a 225kW combined heat & power system via energy services agreement
- Indoor Agriculture Developer (7/14-Present)* Ijamsville, MD & Fort Collins, CO
- Joint developing hydroponic greenhouse farms on East and West Coasts to grow traditional and specialty crops
  - Structuring and negotiating trade and finance agreements with customers and capital sources
- Sustainable Real Asset Project Finance Platform (6/15-12/16)* San Francisco, CA & King of Prussia, PA
- Originated and structured financing transactions for projects in the agriculture, energy, water, and waste sectors
  - Developed templates for project screening, financing structures, terms delivery, and investment memorandums
- Impact Investment Private Equity Firm (4/13-12/15)* Farmington, CT
- Analyzing investment opportunities in areas of clean energy and sustainable agriculture
  - Structured \$5M preferred equity investment into energy management services company
- Renewable Portfolio Solutions Provider (5/13-7/14)* Frederick, MD
- Acquiring solar projects from developers to package and position for sale to financiers by improving financial reporting, adjusting contracts, generating diligence items, creating data rooms, and negotiating terms
  - Successfully acquired 10MW, or approximately \$25M, of solar projects
  - Developed multi-technology renewable energy offerings for facilities of Fortune 500 companies
- Bright Farms, Localized Agriculture (7/12-1/13)* New York, NY
- Provided organizational leadership by challenging and improving business strategy, market positioning, development timeline, project revenue and cost forecasting, and corporate budgeting and fundraising
  - Primarily focused on raising debt and equity project development capital to build urban greenhouse farms which grow local, healthy produce for communities, create jobs, and eliminate transportation GHG emissions
  - Developed relationships with financing providers local to projects including commercial banks, community development financial institutions (CDFIs), venture and project equity investors, foundations, and other mission-driven or impact capital sources
  - Successfully raised capital for first greenhouse farm built in Yardley, PA
  - Coordinate diligence preparation and review including business plans, financial models, PPAs (Produce Purchase Agreements), tax, accounting, real estate, insurance, environmental, and legal
- Wind Resource Assessment Software Company (4/12-6/12)* New York, NY
- Feasibility analysis of PPA financing offerings for small (<100kW) wind turbine deployments
- 3/11-3/12 **Serious Capital** Sunnyvale, CA; New York, NY  
*Product Manager (Division of Serious Energy LLC)*
- Enabled Venture Capital-backed green building start-up to offer financing for energy efficient and SaaS products
  - Originated relationships with customers, channel partners, suppliers of products and services, utilities, government agencies, legal and accounting advisors, insurance providers, and equity and debt financing sources
  - Collaborated with CFO to diligence financing sources and prepare division-level P&L reports
  - Managed execution process from project identification, translating energy audits into financial products, to vendor evaluation, deal structuring, contract negotiation, and capital procurement
  - Designed customer-facing materials (presentations, flyers, website), spoke at industry conferences, and provided sales training to company sales force and channel partners
- 1/10-3/11 **GreenBiz.com** New York, NY  
*Blogger on Clean Technology & Renewable Energy Sectors*

## EXPERIENCE: INVESTMENT BANKING

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- 2004-2009 **Jefferies & Company, Inc.** New York, NY  
*Vice President, General Industrials Group*
- Provided investment banking advisory services to companies and investors in the industrial and energy sectors
  - Completed over 30 mergers & acquisitions (M&A) and financing transactions with publicly- and privately-held corporations and private equity investors during eight years of investment banking
  - Lead industrial and energy services companies coverage effort to develop client relationships and identify creative capital raising or M&A solutions – over 50 new relationships brought to the firm, several resulting in transactions
  - Managed multi-disciplinary professional teams to conduct business, customer, supplier, financial, legal and other due diligence on companies in a sale or financing process
  - Developed marketing materials to present a company's business plan, industry overview, competitive landscape, financial model, and valuation to buyers and investors
  - Negotiated with clients, lawyers, prospective buyers or sellers, and investors during transaction processes
- 2003-2004 *Analyst, Technology M&A Group (Broadview); Fairness Opinion Manager* Foster City, CA
- Developed specific technology market expertise in various areas of enterprise software and IT services
  - Managed the Fairness Opinion development process including collaborating with firm counsel, conducting final due diligence processes, and leading internal partner committee conferences
- 2000-2001 **Morgan Stanley** New York, NY; Hong Kong, China  
*Corporate Finance Analyst, Global Technology Group*
- Experience in multiple areas of technology including semiconductors, enterprise software, communications and networking, contract manufacturing and distribution
  - Gained exposure to banking issues specifically related to the Asia Pacific region
- Summer 1999 *Analyst, Debt Capital Markets*
- Liability management for Fortune 100 companies including tenders, exchanges, and consent offers

### **Representative Transactions (Industry Sub-Sector)**

#### *M&A*

- United Toll System's sale to Roper Industries (Infrastructure Technology)
- Claymont Steel's \$565 MM sale to Evraz (Steel Mini-Mill)
- Altra Industrial Motion's Electronics Business Divestiture to Vacon (Industrial Machinery)
- VistaScape Security Systems sale to Siemens Building Technologies (Security Software)
- NationsRent's \$1Bn sale to Ashtead Group (Rental Equipment Services)

#### *Equity / Equity-Linked Capital Raising*

- A.M. Castle & Co.'s \$165 MM Follow-on Offering (Metals Service Center)
- Altra Industrial Motion's \$155 MM Initial Public Offering (Industrial Machinery)
- Claymont Steel's \$170 MM Initial Public Offering (Steel Mini-Mill)
- Solar Integrated Tech \$37 MM Convertible Senior Subordinated Notes (Solar Roofing Services)
- Huntsman \$1.4 Bn IPO (Chemicals)

#### *Debt Capital Raising*

- International Aluminum Corp.'s \$145 MM Sr. Credit Facility and \$45 MM Mezz. Notes (Building Products)
- Panolam Industries \$155 MM Sr. Sec. Credit Facility and \$151 MM Sr. Sub. Notes Offering (Building Products)
- CitiSteel's \$75 MM Senior Secured PIK Notes Offering (Steel Mini-Mill)
- Thilmany \$175 MM Senior Secured Credit Facility (Paper & Packaging)
- Altra Industrial Motion's \$165 MM Senior Secured Notes Offering (Industrial Machinery)

## EDUCATION

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- 1996-2000 **Columbia University, School of Engineering and Applied Science** New York, NY  
Bachelor of Science, Major: Bio-Medical Engineering; Minor: Computer Science  
Honors/Activities: Dean's List, King's Crown Leadership Award, Squash Team Captain, Activities Board President

## 8. Lori Van der Voort



ENGINEERING

ENERGY SERVICE

April 3, 2017

Mr. Roger E. Clark  
Reinvestment Fund / Sustainable Development Fund  
1700 Market Street – 19<sup>th</sup> Floor  
Philadelphia, PA 19103

### **RE: Nomination to the Board**

Dear Mr. Clark,

I would like to nominate myself to the Board for the Sustainable Development Fund.

As PWI Engineering's Director of Energy, I am responsible for the management of the energy consulting practice. PWI provides facility solutions in planning, engineering, construction, operations, energy management and energy procurement.

Since joining PWI in 2006, I have led the development of sustainable energy design services, while managing energy planning projects for such clients as Yale New Haven Hospital, Carolinas Healthcare System, Abington Memorial Hospital, Rider University, Dow Chemical, Wistar Institute and others.

Over the past 10 years I have also lead the transformation of PWI's Energy practice from an informal service to having the reputation as the leading firm in the region for sustainable systems design including Combined Heat and Power Plants. In addition, my vision has also grown the Energy Practice's services to include a licensed utility brokerage group that has a proven track record of doubling our client's savings on sustainability projects; as well as a grant writing and utility incentive group that has 100% track record of receiving awards and has raised over \$25 million in grants and incentives for client projects in recent years.

Raised in Central Jersey, I have lived and worked in this region and have over 20 years experience in the industry. I have involvement in several local, regional and international energy sustainability groups. As one of the founding board members of Council of Women in Energy and Environmental Leadership (CWEEL) a sub-group of the Association of Energy Engineers (AEE); I was instrumental in the development of the Mentoring Program and continue to be passionate about the advancement of women as future industry leaders.

**New Jersey Office**  
10 Melrose Avenue, Suite 430  
Cherry Hill, NJ 08003  
215-241-9112 (f)

**Pennsylvania Office**  
One Pitcairn Place, Suite 2200  
165 Township Line Road  
Jenkintown, PA 19046  
215-241-9114 (f)

This will give me the ability to network and identify potential clients and business opportunities to help SDF expand its project pipeline and deal flow.

I have been a speaker at numerous events on topics related to energy management solutions and planning, Combined Heat and Power, energy procurement, demand side management and the roles of utilities, suppliers and consultants in energy markets. Speaking engagements include; Pennsylvania Society for Healthcare Facility Engineers, the Oncology Nursing Society, Philadelphia Gas Works, the Association of Energy Engineers, local Healthcare Associations and others.

Through my 20 years of experience providing energy solutions to a variety of customers, I have gained an in-depth understanding of how each organization interacts with their utility provider. I understand the variety of purchasing options, technical support, and project financing and incentive options that PECO and other utilities provide in order to meet these varying needs. I have also has the opportunity to attend various user group and purchasing consortium meetings on behalf of my clients, reviewing the impacts of tariff changes and providing perspectives to be used in negotiations with utility companies.

I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any current criminal investigations.

Sincerely,

A handwritten signature in black ink, appearing to read "Lori Van der Voort", is centered within a light gray rectangular box.

Lori Van der Voort  
Director of Energy

# LORI A. VAN DER VOORT, CEP

DIRECTOR OF ENERGY

[lvandervoort@pwius.com](mailto:lvandervoort@pwius.com)

215-241-9100 Ext. 104



## Years with PWI

11

## Years within Industry

21

## Education

BE in Mechanical Engineering  
Stevens Institute of  
Technology  
1996

Certified Energy Purchaser  
Certified Carbon Reduction  
Manager

## Professional Organizations

American College of Healthcare  
Executives (ACHE)

Association of Energy  
Engineers (AEE)

Council of Women in Energy and  
Environmental Leadership  
(CWEEL)

## Speaking Engagements

Pennsylvania Society for  
Healthcare Facility Engineers

Oncology Nursing Society

Philadelphia Gas Works

Association of Energy Engineers

New Jersey Healthcare  
Engineers Association

## Professional Profile & Responsibilities

Lori has accumulated over 21 years of experience in engineering development and project implementation. Her responsibilities include monitoring project specifications, cost estimation, risk reduction, and the utilization of alternative design approaches.

Her range of project experience includes healthcare, manufacturing, biomedical research, research & development, pharmaceutical, educational, and commercial facilities.

Lori's expertise is in the areas of energy management, technology and the application of integration technologies, and engineering master planning.

## Selected Project Experience:

### Healthcare

#### **Yale New Haven Hospital**

New Haven, Connecticut

Master Plan Project  
Strategic Energy Plan

#### **Abington Health System**

Abington & Lansdale, Pennsylvania

Strategic Energy Planning  
Utility Procurement

#### **Abington Memorial Hospital**

Abington, Pennsylvania

Cogeneration Analysis  
Lighting Study  
Grant Writing  
Cogeneration Design  
Lighting Design  
Curtailment Study  
Curtailment Procurement Workshop  
Demand Response Management

#### **Lansdale Hospital**

Lansdale, Pennsylvania

Energy Conservation Study  
Grant Writing  
Lighting Design

#### **Aria Health System**

Torresdale Campus, Pennsylvania

Cancer Center  
Combined Heat and Power (CHP)

#### **Warminster Hospital**

Warminster, Pennsylvania

Energy Conservation Study  
Grant Writing

#### **Lancaster General Hospital**

Lancaster, Pennsylvania

Cogeneration Study



ENGINEERING

ENERGY SERVICES

# LORI A. VAN DER VOORT, CEP

DIRECTOR OF ENERGY

[lvandervoort@pwius.com](mailto:lvandervoort@pwius.com)

215-241-9100 Ext. 104

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Grant Writing  
Lancaster North Campus Project – Master Plan

**Lankenau Hospital**  
Wynnewood, Pennsylvania

Master Plan Peer Review  
Cogeneration Study

**Bryn Mawr Rehabilitation Hospital**  
Bryn Mawr, Pennsylvania

Master Plan Project  
Spruce Renovations

**Jersey Shore University Medical Center**  
Neptune, New Jersey

Low Voltage Project  
Technology Integration Project  
New Construction Project  
Smart Start Program  
CAT Cogeneration Analysis

**Williamsport Hospital**  
Williamsport, Pennsylvania

Master Plan Project  
Technology Integration Project  
Strategic Energy Master Plan  
Cogeneration Analysis  
Grant Writing  
Operational Management  
Curtailement Study  
Demand response Management

**Divine Providence Hospital**  
Williamsport, Pennsylvania

Cogeneration Study  
Grant Writing

**Bridgeton Hospital**  
Bridgeton, New Jersey

Master Plan Infrastructure Evaluation  
Master Plan Implementation

**Overlook Hospital**  
Summit, New Jersey

Energy Plan and Co-Generation Feasibility

**Morristown Memorial Hospital**  
Morristown, New Jersey

Cogeneration Analysis  
Smart Start Program

**Keystone Mercy Hospital**  
Philadelphia, Pennsylvania

Facility Systems Assessment



ENGINEERING

ENERGY SERVICES

# LORI A. VAN DER VOORT, CEP

DIRECTOR OF ENERGY

[lvandervoort@pwius.com](mailto:lvandervoort@pwius.com)

215-241-9100 Ext. 104

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## **Virtua Memorial Hospital**

Mt. Holly, New Jersey

Facility Master Plan

## **Holy Redeemer Health System**

Huntington Valley, Pennsylvania

Energy Audit  
Propane to Natural Gas  
CHP Feasibility Study  
Energy Workshops

## **AtlantiCare Regional Medical Center – Mainland**

Pomona, New Jersey

Facility Master Plan  
CHP Feasibility Study  
NJ EDA Grant Application  
Smart Start Incentive  
Infrastructure Assessment

## **Susquehanna Health System**

Williamsport, Pennsylvania

Utility Procurement

## **AtlantiCare Health System**

Egg Harbor Township, New Jersey

Utility Procurement

## **Higher Education**

### **Rider University**

Lawrenceville, New Jersey

Energy Study  
CHP Feasibility Study  
NJ EDA Grant Application  
Smart Start Incentive  
Energy Planning

### **Drexel University**

Philadelphia, Pennsylvania

Cogeneration Feasibility

## **Manufacturing, Industrial**

### **Rohm & Haas Company**

Spring House, Pennsylvania

Chiller Replacement  
On-Site Electric Generation  
Campus High Temperature Hot Water Loop Replacement  
Strategic Energy Master Plan



ENGINEERING

ENERGY SERVICES

# LORI A. VAN DER VOORT, CEP

DIRECTOR OF ENERGY

[lvandervoort@pwius.com](mailto:lvandervoort@pwius.com)

215-241-9100 Ext. 104

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**Public**

**Philadelphia Gas Works**

Philadelphia, Pennsylvania

Energy Consulting

Cogeneration Feasibility Study

**Philadelphia Water Department**

Philadelphia, Pennsylvania

Bio Digester Plant



ENGINEERING

ENERGY SERVICES

## 9. Sherif Youssef

March 21, 2017

The Sustainable Development Fund (SDF)

Attention: Roger Clark

Dear Sir,

My interest in joining the board of directors of the SDF is derived from my professional experience in the areas of financial and clean energy projects.

Each year, my team and I conduct seminars to educate and raise customer awareness about new and green energy technology. I developed and implemented long range strategic plans that resulted in increases in the number of Combined Heat and Power (CHP) and fuel cells projects. I took the lead and managed the process of installing a 200 kW Capstone micro-turbine at Philadelphia Gas Works headquarter office.

For our large commercial and industrial customers we developed customized studies with an objective to reduce their energy and operation costs. We also researched and implemented the latest federal regulations for green initiatives to support the compliance of local and federal requirements by local businesses and entities.

I also served as an energy expert to all sales force members so we can provide our customers with new and creative ideas to reduce their emissions rate and improve their performance. For customers with limited financial capabilities, we identified and developed new approaches to finance the projects with minimum hurdle from the customer side.

My attached resume provides information on my professional and academic backgrounds. Please contact me to discuss your organization's needs and my capabilities.

I certify that I do not have any criminal convictions, including felonies and misdemeanors, and that I am not the subject of any criminal investigations.

Thank you for your consideration.

Sincerely,

Sherif Youssef

sherif.youssef@pgworks.com

Tel: 267-249-7469

**SHERIF WILLIAM YOUSSEF**  
103 Buckley Drive, Philadelphia, PA 19115  
(267) 249-7469 / sherifyoussef@comcast.net

Experienced marketing executive and energy leader with extensive experience in strategic planning and execution and a proven track record for developing talent, driving results and improving business performance.

## **PROFESSIONAL EXPERIENCE**

### **PHILADELPHIA GAS WORKS (PGW)**

Philadelphia, PA

#### **Director, Major Accounts, Sales and Marketing**

March 2007 to present

- Developed and implemented long range strategic plans that resulted in increase in sales and in the number of Combined Heat and Power (CHP) projects
- Expanded customer base and maintained loyalty of existing customers by developing and launching annual seminars to educate and raise their awareness about new and green technology and CHP systems
- Identified new creative approaches to finance large projects for new customers with limited financial exposure to the company
- Recommended new technology for our customers such as fuel cells and supported the implementation of the product
- Negotiated with suppliers and identified ways to streamline costs and reduce capital expenses of projects thus increasing the company's profitability
- Lead strategy development and execution for a \$5MM department
- Managed a diverse team of 9 individuals in the Marketing Department

#### **Manager, Major Accounts, Sales & Marketing**

February 2005 to March 2007

- Developed customized studies for large entities to reduce their energy and operation costs; implemented recommendations that resulted in expansion of customer pool
- Developed and conducted HVAC training programs for in house sales force to increase product knowledge and address competitive threats thus increasing sales and productivity
- Learned about and identified the latest approaches to generating cooling and heating by identifying and maintaining relationships with outside industry organizations
- Researched the latest federal regulations for green initiatives to support the compliance of local and federal requirements by local businesses and entities

#### **Senior Staff Engineer**

February 1998 to February 2005

- Served as an energy expert to all sales force members to provide customers with ideas and solutions to promote natural gas and reduce customer operations cost
- Provided customers with technical and financial tools to support project implementation

### **JT&T AIR CONDITIONING CORP**

Maspeth, NY

#### **Construction Manager**

October 1994 to January 1998

- Implemented field construction techniques and procedures, including estimating design and construction of mechanical projects for large commercial and industrial entities
- Coordinated multi-system projects including HVAC, Electrical and Plumbing for large scale residential and commercial buildings
- Managed all aspect of the construction projects, including budgets, work sequence to ensure timely and successful completion Supervised projects ensuring implementation compliance with the design parameters and objectives
- Designed HVAC components and systems including equipment, duct, pipes heat load and ventilation indexes

## **JAM CORP, ELECTRO MECHANICAL DIVISION**

Dubai, United Arab Emirates

### **Project Manager**

July 1981 to December 1990

- Directed the in-house design team in developing rapid response to contractor queries regarding design changes thus implementing projects on time and on budget
- Worked on design and installation of HVAC equipment and system components to assure compliance with design parameters and objectives
- Performed trouble shooting of failures in mechanical systems; arranged for replacement and retrofitting to ensure efficiency and to deliver high quality end product
- Conducted technical studies, evaluated the results compared with the original design

## **E.G. ENGINEERING CORPORATION**

### **Sales Engineer**

- Worked on sales and design of large commercial refrigerators and freezers including heat load calculations and selection of equipment
- Managed and communicated with an internationally diverse team to install of equipment and cold storages for multiple projects

## **EDUCATION & LANGUAGE SKILLS**

- Master of Business Administration-- Finance Major, LASALLE University, Philadelphia PA
- Bachelor of Science - Mechanical Engineering, , Cairo, Egypt
- Fluent in French

## **LEADERSHIP**

- Represented PGW as a guest speaker for national and international Energy Association seminars
- Developed curriculum for fundamentals of HVAC, CHP and gas cooling applications for PGW employees
- Tutored students in the Community College of Philadelphia in Statistic, Math and Economics
- Volunteered at local schools to help students with science and engineering projects; served as judge to identify the most creative project

## **LICENSES & COMPUTER SKILLS**

- Professional Engineer's License (PE), in the State of Pennsylvania and Delaware
- Certified Energy Manager (CEM), Certified Energy Auditor (CEA)
- Certified Demand Side Management (CDSM), Certified Green Building Engineer (GBE)
- AIMS, BCCS, and Goldmine

## **MEMBERSHIPS**

- Association of Energy Engineers (AEE)
- American Society of Heating, Refrigerating and Air-conditioning Engineers, Inc. (ASHRAE)
- American Gas Cooling Center (AGCC)
- The Engineer's Club of Philadelphia
- Gas Equipment Guild of Delaware Valley - former President
- International District Energy Association (IDEA)
- Energy Solution Center (ESC)