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PACE In A Box Outreach Agenda and Talking Points

This agenda enables and enhances volunteer presenters' ability to successfully introduce the Texas PACE program and PACE In a Box to local stakeholders and governmental agencies. These include economic development organizations, chambers of commerce, building owners and managers associations, commercial realty organizations and conservation/environmental organizations, among others. Following the Agenda allows consistent, effective delivery of the PACE message, gains involvement of the appropriate parties and/or decision makers, and eases the flow of its acceptance and implementation.

Two key sales tools will be helpful in this presentation:

- The PowerPoint Creating Economic Impact 2015, [Link to PPT on website] and
- The www.keepingpaceintexas.org website, which holds a vast array of resources for interested stakeholders, including overviews, tabs clearly identifying Benefits for specific groups and a Resource Library with a PACE in A Box FAQ and a full set of documents for local use in adopting and implementing PACE.
- The website also offers a link to Volunteer at <http://www.KeepingPACEinTexas.org/support-pace/join-the-effort>
- Keeping PACE in Texas thrives through member's financial support: <http://www.KeepingPACEinTexas.org/join-pace>

For assistance, contact:

Charlene Heydinger

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Michael West

PACE Outreach

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MEETING AGENDA

- I. Introduce yourself as a volunteer and explain why you have assumed the responsibility of gaining and holding this meeting.
TP (talking point): Tell them why you are inspired to be presenting this program. Your desire is to expand their knowledge of the benefits of PACE to their stakeholder group (or local government, as applicable) and to enlist their support in the local adoption and implementation of the PACE program. Introduce the www.KeepingPACEinTexas.org website as a tool they can reference on all aspects of PACE, from national presence to documents and steps for local adoption.
- II. Begin the presentation of the Advancing PACE in Texas Power Point.
TP: Notes have been added to the PPT for your review prior to presenting. Be sure to identify and emphasize points of greatest relevance to this stakeholder.
- III. If time and interest permit, reference the www.KeepingPACEinTexas.org website.
TP: The website has Overview, Stakeholder Support, Benefits, PACE in a Box documents and FAQ. The Library Resources tab provides detailed information on PACE and Commercial PACE implementation in Texas and in other states that have authorized and are in varying steps of implementing Commercial PACE programs across the country.
- IV. Ask for their support for local implementation of the “PACE In A Box” program developed by Keeping Pace in Texas.
PACE in a Box was uniquely developed by Texas stakeholders to avoid the pitfalls and extraordinary expense of PACE in some other states. This model requires minimal government involvement, is market based, scalable and allows for regional collaboration in administration.
- V. Next Steps –
 - a. Who are additional decision makers to contact to further PACE implementation?
 - b. Are there speaking opportunities with this or other local organizations?
Newsletter or magazine articles that could be submitted?
 - c. If there are questions that cannot be easily answered, commit to getting an answer and contact Charlene Heydinger or Michael West.



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MEETING FOLLOW-UP

For the sake of tracking the implementation strategy and the success of this agenda and talking points, and other marketing efforts, please submit information in the following format to Michael.West.ATX@gmail.com:

Meeting Date	
Volunteer Organizer	
Meeting Host	
Organization	
Location of Meeting	
Target Community/County/Region	
Participants	
Primary Contact Phone and Email	
Summary of Outcome	



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OUTREACH PHONE CALL

Introductory Call

Hi A, This is _____. I'm calling to let you know that I've begun working with a great project, Keeping PACE in Texas. You may have spoken with Charlene Heydinger about it. Are you familiar with the Property-Assessed Clean Energy program?

- Determine level of familiarity with PACE

I'm with _____ organization/company, and I've been volunteering to help introduce the program here in this city/county/region and encourage its adoption. I'd like to speak with _____ about the adoption of PACE in [Name of] County.

Key Points depending on familiarity...

- In the last Leg Session, SB385 passed authorizing the Property Assessed Clean Energy Act, or PACE.
- A diverse coalition that includes environmentalists, city officials, bankers and contractors worked on the initial PACE legislation and are now working on its adoption and implementation across the state.
- PACE allows commercial and industrial property owners, including multi-family residential (over four units) and non-profits (like churches) to use a contractual property assessment to finance energy efficiency upgrades like solar panels and water recycling systems. PACE programs bill an owner through the lien and forward payments to a private lender. Under the program, property owners pay less than what they save on their energy bills. If a property is sold, the new owner inherits the debt — a rule meant to further reduce the risks of investment.
- PACE is local option and must be adopted by the local government, city or county in order to be available for local property owners.
- The PACE Act authorizes municipalities and counties in Texas to work with private sector lenders and property owners to finance qualified improvements using an economic development tool available to counties and municipalities – the contractual property assessment. It works like this: the property owner chooses a private lender, who pays for the improvement. The property owner voluntarily requests that the local

government place an assessment on the property, secured with a senior lien, until the assessment is paid in full. The assessment is owed to the local government, which forwards the payments to the private lender.

- While PACE may be adopted by many local governments around the state, those that adopt PACE may enjoy a competitive advantage in economic development over those localities that do not.

What do I want?

1. I would like to visit with you and possibly key staff to provide more information on adoption of PACE in this county.
2. I would like for you, as a community leader and economic developer, to be familiar with and conversant about the advantages of the program and the steps for implementation of PACE, and specifically, to know about PACE in a Box.
3. I want a letter of support to your local government, especially county commissioners, encouraging adoption of PACE in a Box as soon as possible.
4. I want your help in getting the word out to other economic developers and especially to the business community that local adoption and implementation of PACE can offer a competitive advantage to your community over those that fail to choose to adopt PACE.
5. Are you aware of any upcoming retrofit projects that may be a good fit for PACE?
6. How can we at KPT work with you and educate your membership about the advantages of PACE and the steps to implementation?
 - a. Specific organization person to contact/meet with
 - b. Newsletter article
 - c. Outreach to your membership
 - d. Speaker at event



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Why PACE in a Box?

Twenty other states have adopted Commercial PACE programs and allow similar financing plans, though most apply only to energy, unlike in Texas. Most of the states have stumbled, largely because of the objections of mortgage regulators. The Texas legislation calls for permission from the mortgage lender in order to proceed with a PACE application.

In California, observers say the PACE program there has suffered from a patchwork of rules across cities that have discouraged investors from financing projects statewide. Texas stakeholders have taken the time and their own volunteer energies to develop a consistent set of documents for local government, called PACE in a Box, to be a consistent program for business property owners who operate businesses across jurisdictions.

More detailed information, including an FAQ, the full PACE in a Box Toolkit and model documents for local government adoption and implementation are available in the Resource Library at www.keepingPACEinTexas.org.