

Thursday, November 7

9:00 am – 9:30 am (Salon D & E)

Conference Welcome

Chairman Maureen O. Helmer,
New York State Public Service Commission

President William M. Flynn, Esq.
New York State Energy Research and Development
Authority

Dr. Patricia Pine, Director
New York State Office for Aging

Michael Corso, Chief of Residential Advocacy, New
York State Department of Public Service and Chairman
of the LIFE Conference will serve as master of
ceremonies throughout the conference.

9:30 - 10:00 Keynote (Salon D & E)

Susan K. Hager,
United Way of New York State, Inc.

The United Way of New York State heads the 211
Collaborative which has been designated by the New
York State Public Service Commission and the New
York State Telecommunications Association as the lead
entity for implementing 211 service in New York. This
service will provide New Yorkers with an easy-to-
remember number that they can call when they need help
or access to human services in their community.

10:00 – 10:15 Break

10:15 - 11:15 (Salon F,G,H)

Plenary: Accessing Affordable Energy

This Plenary Session will provide the foundation for the
conference. It will consider the range of factors that
influence the ability of low-income households to gain

access to affordable energy. Each of the panelists
authored one of the briefing papers in your conference
packet. The moderator, Jack Ziegler, is the author of
*Ensuring Access to Affordable Energy Services for Low-
Income Customers.*

- **Jack Ziegler, Moderator**
Niagara Mohawk Power Corporation
- **David Hepinstall,**
Association for Energy Affordability
- **Martin Insogna,**
New York State Dept. of Public Service
- **Ben Wiles,**
Public Utility Law Project
- **Peggie Neville,**
New York State Energy Research and Development
Authority
- **Sue Montgomery Corey,**
Community Power Network of NYS, Inc.

11:15 – 11:45 (Salon F,G,H)

Group Discussion on Affordable Access

This is your chance to provide the authors of our
conference briefing papers with feedback about the
challenges facing low-income New Yorkers in the
evolving competitive market as well as the opportunities
for making affordable energy accessible to them.

11:45 – 12:30 (Salon F,G,H)

Plenary: Using Technology to Access Affordable Energy

This Plenary Session will explore the role that
technology can play in providing access to affordable
energy. The moderator, Peggie Neville, is author of the
conference briefing paper *Advances in Energy*

Technology. The speaker, Rick Gerardi, directs the NYSERDA Residential Energy Affordability Program which is bringing energy efficiency resources and technology to the residential market.

- **Peggie Neville, Moderator**
New York State Energy Research and Development Authority
- **Rick Gerardi,**
New York State Energy Research and Development Authority

12:30 – 2:00 Lunch (Salon D & E)

- Lunch speaker:
Hon. Mary O. Donohue, Lt. Governor

2:00 – 3:00 (Salon D & E)

Plenary: The Competitive Market and Accessing Affordable Energy

This Plenary Session will explore how the evolving competitive market is impacting the ability of low-income customers to access affordable energy. The moderator, Martin Insogna, is author of the conference briefing paper *Competitive Markets and Access to Affordable Energy*.

- **Martin Insogna, Moderator**
New York State Dept. of Public Service
- **Michael Meath,**
Agway Energy Products
- **Jonathan Gruchala,**
National Fuel Gas

3:00 – 3:15 Break

3:15 – 4:30 (Salon F)

Breakout #1: Community Investment In Affordable Energy

This session will explore ways to build community investment in local solutions to providing affordable energy to low-income customers. The presenters include a local community action agency which is working with a credit union to develop the State's first Individual Development Account for the energy needs of low-income households and a community loan fund which uses investments from individuals to make loans to low-income small businesses and housing projects.

- **Peggie Neville, Moderator**
New York State Energy Research and Development Authority
- **Earl Hicks,**
Tompkins Community Action
- **Robert Radliff,**
Capital District Community Loan Fund

3:15 – 4:30 (Salon H)

Breakout #2: Aggregation

This session will explore the potential for group buying or aggregation for low-income customers. The presenters represent three very different aggregation efforts: one serves low-income multi-family buildings, one serves municipalities and low-income residential customers, and the third provides oil service to low-income households. Each is at a different stage in its development.

- **Lea Ann Rosenthal, Moderator**
New York State Department of Public Service
- **Stuart Stein,**
Municipal Electric and Gas Alliance
- **Michael Bobker,**
Association for Energy Affordability
- **Tony Figueroa,**
Regional Economic Community Action Agency

3:15 – 4:30

(Salon G)

Breakout #3: Consumer Protection

The evolving competitive market creates many new challenges to New York’s consumer protection requirements. This session will provide an update on consumer protection in New York.

- **Martin Insogna,**
New York State Dept. of Public Service

4:30 – 5:00 Closing

(Salon D & E)

- **Michael Corso,**
New York State Dept. of Public Service

5:30 – 7:00 Reception (Foyer)

November 8

7:30 – 9:00

(Salon D & E)

Registration/Continental Breakfast

8:30 – 9:30

(Salon D & E)

Plenary: Using HEAP and Other Funding to Access Affordable Energy

This Plenary Session will delve into the challenges involved in linking traditional, government-funded low-income energy resources with the competitive market’s System Benefits Charge funding. One of those traditional resources, the Low-Income Home Energy Assistance Program (HEAP) is slated for reauthorization this year by the federal government. That effort may result in changes to the program and the national formula for allocating HEAP resources. The session’s moderator, David Hepinstall, is author of the conference briefing paper *Using HEAP and Other Funding to Access Affordable Energy*.

- **David Hepinstall, Moderator**

Low-Income Forum on Energy, 2002 Statewide Conference

Association for Energy Affordability

- **Meg Power,**
Economic Opportunity Studies
- **Rick Gerardi,**
New York State Energy Research and Development Authority
- **Bruce Bowdy,**
New York State Office of Temporary and Disability Assistance

9:30 – 10:45

(Salon F)

Breakout #1: Using HEAP and Other Funding Discussion

This session will give you a chance to discuss with the panelists how the new and traditional energy resources can be used to address the energy needs of low-income customers.

- **David Hepinstall, Moderator**
Association for Energy Affordability
- **Meg Power,**
Economic Opportunity Studies
- **Rick Gerardi,**
New York State Energy Research and Development Authority
- **Bruce Bowdy,**
New York State Office of Temporary and Disability Assistance

9:30 – 10:45

(Salon G)

Breakout #2: Aging and Energy: New York State Office for Aging’s Project 2015

At the request of Governor Pataki, the New York State Office for Aging has been working with many state agencies to identify the needs of New York’s aging population and how the service delivery system will need to change to meet those needs. Project 2015 refers to the fact that by the year 2015, the Baby Boom

generation will be a significant share of the senior population. The expectations and needs of that group are expected to have a huge impact on service providers at the community level as well as for the state. This session will provide an opportunity to hear what Office for Aging has learned and to share with them ideas and concerns about the energy needs of New York's aging population.

- **Marshall Suess, Moderator**
New York State Office for Aging
- **Jennifer Rosenbaum,**
New York State Office for Aging

9:30 – 10:45 (Salon H)

Breakout #3: Consumer Education

Consumer education is key to helping low-income customers participate effectively in the changing energy market. This session will explore consumer education strategies used to provide residential customers with the information that they need to make informed decisions about their energy service.

- **Cherie Gregoire, Moderator**
New York State Energy Research and Development Authority
- **Rich Gifford,**
New York State Department of Public Service

10:45 – 11:00 Break

11:00 – 12:00 (Salon F,G,)

Plenary: Using Collaboration and Coordination as Tools to Access Affordable Energy

This Plenary Session will explore the role that collaboration and coordination of resources can play in providing access to affordable energy. The moderator, Sue Montgomery Corey, is author of the conference

briefing paper *Using Coordination and Collaboration as Tools to Access Affordable Energy*.

- **Sue Montgomery Corey, Moderator**
Community Power Network of NYS, Inc.
- **Patricia Boynton,**
NYSEG
- **Tina Zerbian,**
Cattaraugus County Community Action
- **Mike Colgrove,**
New York State Energy Research and Development Authority

12:00 – 1:30 Lunch (Salon D & E)

- Lunch Speaker:
Lisa Wood,
The Brattle Group

1:30 – 2:30 (Salon D & E)

Universal Service as a Tool for Accessing Affordable Energy

This Plenary Session will explore the concept of universal service and its role in providing access to affordable energy. The presenter, Ben Wiles, is author of the conference briefing paper *Universal Service As A Tool For Accessing Affordable Energy*.

- **Ben Wiles,**
Public Utility Law Project

2:30 – 3:00 Closing (Salon D & E)

- **Michael Corso,**
New York State Dept. of Public Service

Our Conference Speakers

Michael Bobker has worked in the energy services field for twenty five years, starting with the NYC Weatherization program in the late 1970's. He has hands-on operating as well as analytical experience with all types of mechanical and electrical systems, especially those of apartment buildings. He managed an independent energy services company for ten years, developing energy efficiency projects for many types of clients under various innovative project financing structures. At AEA he is currently focusing on developing information technology products and systems for low-income properties as part of AEA's low-income aggregation work.

Bruce Bowdy is Program Outreach Specialist III for the New York State Office of Temporary and Disability Assistance. He has served the office in various positions since 1977. Currently, Bruce is one of four regional team leaders in the Division of Temporary Assistance, responsible for the western New York region. Bruce is the Low-Income Home Energy Assistance Coordinator for New York State and his regional team is responsible for LIHEAP policy statewide and temporary assistance program and policy support for the 17 western regional counties.

Pat Boynton is the Manager of NYSEG's low-income assistance program Power Partner. She has worked with NYSEG for the past seventeen years and has been an advocate for low-income families and individuals for thirty years. Prior to joining NYSEG, Pat worked for Tompkins County Department of Social Services. Pat's advocacy work continues at the community level through her work with boards and steering committees which focus on low-income issues. Among these: several Broome County boards, FEMA, Catholic Charities, and the Welfare to Work Steering Committee. She is also a member of the Public Service Commission's LIFE Steering Committee and recently joined the Low-Income Public Benefit sub-committee of the Public Service Commission's Competitive Marketing Proceedings.

Michael Colgrove is a Project Manager at NYSERDA's New York City office. He is currently managing NYSERDA's Assisted Multifamily Program, the Multifamily Building Energy Efficiency Conference, and the Multifamily Standardized Training Program. Mr. Colgrove received his B.S. in Environmental Science from the University of Alaska in Fairbanks and his M.S.

in Energy Management from the New York Institute of Technology in New York City. His experience includes work with the Weatherization Assistance Program in multi-family building auditing, energy education, and management of NYSERDA's Direct Install Program. Mr. Colgrove resides in Astoria, Queens, NYC.

Michael Corso serves as Chief of Residential Advocacy at the New York State Department of Public Service. Michael was the principle advocate for the creation of a residential advocacy organization within the Department, representing the concerns of residential customers on a broad range of utility service issues. Those issues have included facilitating the transition to competition in both the telecommunications and energy industries, and ensuring that the benefits of the competitive market reach residential consumers, while at the same time maintaining appropriate consumer protections. He has been a member of the staff of the Department of Public Service since 1986. Michael holds Master's and Bachelor's degrees with concentrations in telecommunications, policy, and management from the University at Albany. He is the current President of the University at Albany Alumni Association, and the past Chairman of the Board of the Northeast Sustainable Energy Association, an organization promoting the use of renewable energy and a zero emission future. Michael is Chairman of the Low-Income Forum on Energy (LIFE).

Tony Figueroa has been involved in community action since the early seventies. During that period he has participated in many innovative approaches in dealing with the social ills of society. Among these were the development of various housing developments (example: TAINO TOWERS in East Harlem, New York) in New York City and involvement with the Youth Action Program that serve as the model for the national YOUTHBUILD program. For the last few years he has been Director of Special Projects/Facilities for the Regional Economic Community Action Program in Middletown, New York where he has worked on various innovative housing and community development projects, the most recent being the HOPI (Heating Oil Purchasing Initiative) project.

William M. Flynn was appointed President of the New York State Energy Research and Development Authority (NYSERDA), in Albany, by the Board of Directors in November 2000. Prior to becoming President, Mr. Flynn served as Vice President, Treasurer, and Secretary to the Board of NYSERDA since January 1999. Established in

1975, NYSERDA provides funding to businesses, local governments, educational institutions, and others for energy, environmental and economic development projects. As President of NYSERDA, Mr. Flynn also serves the State of New York as Chairman of the Energy Planning Board; and as a member of the State Environmental Board, the Water Resources Planning Council, and the Disaster Preparedness Commission. He is Chairman of the Association of State Energy Research and Technology Transfer Institutions (ASERTTI). He is the State's liaison officer to the U.S. Nuclear Regulatory Commission and represents New York State on the National Low-Level Radioactive Waste Forum. He also serves on the Board of Directors of the Center for Clean Air Policy, the Alliance to Save Energy, and the National Oilheat Research Alliance. Mr. Flynn previously served as First Deputy Attorney General, Chief of Staff, and Special Counsel to State Attorney General, Dennis C. Vacco. In the early 1990's, Mr. Flynn was an Assistant United States Attorney and Executive Assistant in the Western District of New York. Mr. Flynn received his Juris Doctor from the University of Dayton Law School in 1987. Prior to law school, Mr. Flynn worked as an executive assistant to two successive New York State Assembly Minority Leaders, Clarence D. Rappleyea, Jr, and James L. Emery. Mr. Flynn holds a B.A. in political science from LeMoyne College in Syracuse, NY.

Rick Gerardi is the Director of the Residential Energy Affordability Programs (REAP) at NYSERDA. NYSERDA is a public authority which conducts a multifaceted research and development program to develop and implement new energy technologies within New York State. Its energy efficiency programs help consumers, schools, hospitals, industries and State agencies implement energy efficiency measures, it provides essential energy planning and analysis to a variety of stakeholders, and plays a vital roll in overseeing the West Valley nuclear waste site. NYSERDA also administers over \$45 million per year of public and ratepayer funds in residential and consumer energy efficiency efforts. REAP, established within NYSERDA by Rick in 1998, implements statewide programs which improve both residential efficiency and affordability. REAP focuses deployment resources to create innovative strategies for improved building performance in New York's residential sector and creative strategies to address the special energy needs of the State's low-income citizens. Market-based initiatives range from increasing consumer awareness of and demand for energy efficient products and services

through an Energy Star® labeling effort, to the support and enhancement of a competent infrastructure of building performance contractors to assure quality work. Mr. Gerardi was the director for the State's low-income Weatherization Assistance Program for 14 years where he managed over a half a billion dollars in efficiency work and instituted a number of innovative practices. He has been in the building trade for over 25 years, having built solar, energy efficient homes prior to his tenure with the State. He is a graduate of Dartmouth College.

Rich Gifford is Manager of Consumer Education in the Department of Public Service's Office of Consumer Education and Advocacy. Rich has a staff of outreach and education specialists located in Albany, Buffalo, New York City and Syracuse. His group is responsible for implementing a Statewide consumer education program to make consumers aware of their choices and for overseeing utility customer education programs. Rich joined the Department of Public Service in 1982.

Cherie Gregoire is an Associate Project Manager for the Residential Energy Affordability Program (REAP) at NYSERDA. Currently, Cherie serves on the LIFE Communications and Outreach Committee. From November 2001 to April 2002, she ran a Public Awareness campaign designed to inform low-income New Yorkers of the variety of energy management and assistance programs available to make energy more affordable.

Jonathan Gruchala is presently the General Manager of the Quality Assurance Department at National Fuel Gas in Buffalo, New York. He is responsible for the company's low income programs in both New York and Pennsylvania, including the LIRA and PACE programs, and has served as the company's witness on consumer issues in regulatory proceedings in both states. In addition to low-income programs, Quality Assurance also resolves consumer complaints to the regulatory commissions in both states, provides outreach and education, conducts internal quality-of-service audits, administers a field compliance auditing program, reports customer service performance measures to the New York State Public Service Commission, and conducts customer satisfaction research and focus groups. He is Past President of the Central New York Chapter of the Society of Consumer Affairs Professionals (SOCAP), and is a member of the Buffalo Area Salvation Army Advisory Board.

Susan K. Hager is the President of the United Way of New York State, a membership organization serving 41 local United Ways which annually provides \$210 million to support health and human services programs in their communities. Ms. Hager has served as chief professional officer of UWNYS for nearly 20 years. Her agency's legislative policy accomplishments include passage of legislation to: Expand the School Breakfast Program, Expand the State Earned Income Tax Credit for working families, Strengthen the Charitable Solicitation Law and improve purchasing and contracting for nonprofits that do business with the state. Ms. Hager is a past chair of the Council of State United Way Associations and previously served as Director of Regional Offices under the late New York State Assembly Speaker Stanley Fink. She earned a B.A. in Political Science and completed two years of doctoral level graduate work in Public Policy at the State University of New York at Buffalo.

Chairman Maureen O. Helmer was appointed Chairman of the New York State Public Service Commission by Governor Pataki in 1998. Ms. Helmer also serves as a board member of the New York State Energy Research and Development Authority, the New York State Environmental Board; the Board of Directors of the State University of New York at Albany Foundation; the New York State Disaster Preparedness Commission; and the National Association of Regulatory Utility Commissioners' (NARUC) Board of Directors, where she also serves as Vice Chair of the NARUC Electricity Committee. She is past president and a founding board member of New York State Women in Communications and Energy. Prior to her appointment as Chairman, Ms. Helmer served as Deputy Chairman, Commissioner and General Counsel to the Department of Public Service. Before joining the Commission, Ms. Helmer held numerous state legislative positions, including Counsel to the Senate Energy committee.

David Hepinstall is the Executive Director of the Association for Energy Affordability, Inc. (AEA). David has extensive program development and management experience in weatherization and other government and utility energy efficiency programs serving low-income communities. For the past 7 years he has been an active participant representing low-income energy efficiency perspectives in various proceedings of the New York State Public Service Commission relating to electric and gas industry restructuring and has been the Chair of the Customer

Aggregation subgroup of the Retail Competition Development Committee in the current "Energy Competition: Next Steps" proceeding. David is also a member of the LIFE Steering Committee and is playing a lead role at AEA in helping to develop the Affordable Energy Solutions, Inc., a statewide, all fuels, public interest energy services company designed to help insure that low-income customers have access to whatever benefits may become available through retail competition while also retaining adequate consumer protections.

Earl Hicks currently directs the PowerSavers Program at Tompkins Community Action in Ithaca; a multifaceted pilot project which incentivises energy conservation, and rewards financial planning (particularly as energy consumers) through matched bank accounts and financial literacy training. Earl's prior endeavors at TCAAction include implementing the NYSEG Power Partner Program, facilitating Weatherization crew BPI certification, developing the Energy Services department OSHA compliant Health and Safety Policies, and establishing EPA credentialing as New York Certification Lead-Based Paint Supervisor for crew leaders. Over the past two decades Earl has been involved in innovative projects focusing on energy conservation, sustainable energy production, energy production/pollution control through waste management, and academic research at Cornell University. Earl holds a bachelors degree from Hampshire College, and has pursued graduate work in Business Administration.

Martin Insogna is a Utility Consumer Program Specialist 4 with the New York State Department of Public Service. Mr. Insogna is assigned to the Office of Consumer Education and Advocacy, where he promotes consumer access to essential services, and opportunities for consumers to realize the benefits of competitive markets. He previously served with the Department's Office of Electricity and Environment with responsibility for a variety of initiatives related to the introduction of retail access and public benefit programs. He was involved in the creation of New York's system benefit charge which funds during public policy initiatives not expected to be adequately addressed by competitive electric retail markets during the transition to the competitive electric retail markets during the transition to the competitive market. Mr. Insogna has worked for the Department of Public Service since 1990. He is a graduate of Colgate University, with a B.A. in philosophy and economics.

Michael Meath is Vice President of Business Development & Public Affairs for Agway Energy Products, a wholly-owned subsidiary of Agway, Inc. Agway Energy Products retails heating oil, propane, natural gas, electricity, gasoline and diesel fuel to over 500,000 customers throughout NY, PA, NJ, and VT. The company also provides HVAC sales, installation and service to homes, farms and businesses. Mr. Meath joined Agway in 1989 and served in a variety of roles including Director of Government & Regulatory Affairs for Agway's six business units located in 25 states. He holds degrees in Business Management/Economics and Fire Protection Engineering from the State University of New York. He also serves as Northeast Gas Policy Chairman for the National Energy Marketers Association in Washington DC.

Sue Montgomery Corey is President of the Community Power Network of NYS, Inc. (CPN). CPN creates opportunities for the needs of New York families and communities to be addressed in the changing energy market. Ms. Montgomery Corey serves as conference manager for the Low-Income Forum on Energy. She has represented the interests of low-income households as Executive Director of the NYS Community Action Association and NYS Weatherization Directors Association. She has also represented rural and urban communities as a member of the staff of the Rural Housing Coalition, Capital District Community Development Loan Fund and the Tug Hill Commission. Ms. Montgomery Corey holds a M.S. in Technical Communications from Rensselaer Polytechnic Institute and a B.A. in Environmental Studies and Government from St. Lawrence University.

Peggie Neville is a Project Manager for NYSERDA's Residential Energy Affordability Program. Ms. Neville's primary responsibilities include the Low-Income Aggregation Pilot Program, the Oil Buying Strategies Pilot Program, and the Low-Income Forum on Energy (LIFE). Ms. Neville serves as NYSERDA's representative for the LIFE Steering Committee, the Weatherization Assistance Program's Policy Advisory Council and the Home Energy Assistance Program's (HEAP) Block Grant Advisory Council. She received her B.S. in Business Administration from the Massachusetts College of Liberal Arts and her MBA from Rensselaer Polytechnic Institute.

Meg Power, Ph.D. is President and Executive Director of Economic Opportunity Studies (EOS) of Washington, DC, a non-profit corporation that provides analysis,

training, and support for organizations and projects that offer low-income families and communities resources to become more self-sufficient. She has specialized in analyzing and designing programs that provide sustainable community development, energy efficiency, and fair access to energy services and environmental benefits. She has also developed expertise in the management and information systems of the community-based organizations that provide such resources. Dr. Power and the staff of EOS regularly organize and contribute to training for local Community Action Agencies, Weatherization subgrantees, and state agencies on energy efficiency, energy market issues affecting the poor, and program management issues. The latter include techniques for client data collection and use, program performance measurement, and program design issues related to the implementation of federal and state assistance programs. EOS also serves as consultant to the National Community Action Foundation in the preparation of sessions and materials for its annual energy and utility restructuring training conferences, supported by the U.S. Department of Energy, in 1997, 1998, and 1999. It provides policy analysis for NCAF initiatives in utility decisions on low-income programs. From 1975 - 1981, Dr. Power served on the US Senate staff; from 1975 - 1978, she was Legislative Assistant to Senator Edward W. Brooke (R, MA) and from 1979 - 1981 she was Minority Staff Director of the Energy and Nuclear Non-Proliferation Subcommittee of the Senate Governmental Affairs Committee. She holds a Ph.D. from the Massachusetts Institute of Technology and a B.A. from Radcliffe College.

Patricia P. Pine, Ph.D., the Director of the New York State Office for the Aging, previously served as Executive Deputy Director of the New York State Office for the Aging, Director of the Ulster County Office for the Aging, the Dutchess County Office for the Aging, and as President of the New York State Association of Area Agencies on Aging. She also is President and founder of the Gerontological Institute, a not-for-profit organization promoting education and training on aging. Over many years, Dr. Pine served as an Adjunct Professor in Sociology at SUNY at New Paltz and has taught many courses in the field of Social Gerontology at Vassar, Marist, Bard, and other New York colleges and universities. Dr. Pine holds a B.A. degree from Vassar College, an M.A. from Columbia University, and a Ph.D. from SUNY at Albany.

Bob Radliff is the Executive Director at the Community Loan Fund, where he has worked since 1996. The Capital District Community Loan Fund, Inc. is a locally-based nonprofit financial institution meeting the needs of the area's economically underserved people and communities. During a transition period, 1995-1996, he had a reconnaissance mission into the banking industry. From 1987 to 1995, he worked with two nonprofit affordable housing and community development organizations, including the Albany Community Land Trust.

Jennifer Rosenbaum is a policy analyst with the New York State Office for the Aging (NYSOFA). She has been with the NYSOFA since 1987. Jennifer works on a variety of policy and program development issues at NYSOFA. Her current responsibilities include serving on NYSOFA's coordinating team for the Governor's *Project 2015: State Agencies Prepare for the Impact of an Aging New York* initiative with New York State agencies, which she will highlight today. Ms. Rosenbaum has a Bachelors Degree in Gerontology and Consumer Economics from Cornell University and a Masters Degree in Public Policy from Cornell.

Lea Ann Rosenthal has worked for the NYS Department of Public Service since 1986 and is currently a Utility Consumer Program Specialist 4. In this capacity, she advocates and negotiates positions on behalf of residential customers in utility rate proceedings including customer service issues, low-income and aggregation programs. She has experience facilitating discussions between utilities and municipal entities to aggregate groups of customers for the purpose of securing competitive energy supplies. Prior to joining the Department in 1986, Lea Ann worked for the NYS Office of General Services and the NYS Dept. of Labor.

Marshall Suess has been employed by the New York State Office for the Aging since 1976. He has been a grant budget specialist, trainer, and program coordinator. Marshall designed and implemented the Weatherization Referral and Packaging Program (WRAP), and supervises the Office for the Aging's HEAP Program. Marshall also supervises generic field staff for NYSOFA.

Stuart Stein is the Executive Director and Chairman of the Board for MEGA (the Municipal Electric and Gas Alliance), a non-profit corporation whose purpose is to aggregate the purchasing power of consumers of electricity and natural gas in the upstate New York

area. The goal of MEGA is to bring lower costs for electricity and natural gas to all utility customers including residential users, businesses, municipalities, school districts and non-profit organizations. He is also a Professor Emeritus in City and Regional Planning at Cornell University. From 1983 to 2002, he was an elected member of the Tompkins County Legislature, and was Chairman of that Legislature from 1994-1997. He served on the Ithaca City Council in the 1970's, and has been a member of many advisory boards and commissions at the local, state and federal levels. These include the State Board for Historic Preservation, the State Parks Council, the Federal Advisory Commission on the Erie Canalway National Heritage Corridor, the Tompkins County Industrial Development Agency, the Ithaca-Tompkins County Transportation Commission, the Ithaca Planning and Community Development Board, the Ithaca Urban Renewal Agency. and many others. He graduated from MIT with degrees in Architecture and City Planning.

Lisa V. Wood is a Senior Consultant with *The Brattle Group* and is based in the Washington, DC office. She was previously a Principal with PHB Hagler Bailly (now PA Consulting) and is involved in electric industry restructuring issues primarily from the retail perspective. Her recent work includes examining retail-restructuring issues in electricity markets in the U.S., estimating benefits and costs of metering technologies, and analyzing demand response programs. She holds a Ph.D. in Public Policy and Management from the University of Pennsylvania. Her recent publications include, "Designing Standard-Offer Service to Facilitate Electric Retail Restructuring" (forthcoming in the *Electricity Journal*, 2002) and "The New Vanilla: Why Making Time-of-Use the Default Rate for Residential Customers Makes Sense" (*Energy Customer Management*, July-August 2002). Dr. Wood also directed (or co-directed) two major national studies on electricity choices in the U.S. (1) *Share Wars Study Results: Predicting Customer Choices in Electricity Markets in the US* (February 2000), and (2) *Predicting Customer Choices Among Electricity Markets: Retail Markets* (November 1998).

Ben Wiles is a Senior Attorney at the Public Utility Law Project (PULP) and has focused his professional time on the developing administrative and legislative issues growing out of the introduction of retail competition in the regulated electric and gas industries. In addition, he has assisted in the Project's efforts to monitor the implementation of telephone Lifeline rates and to

promote and facilitate the introduction of advanced technology networks in low-income communities. He comes to the Public Utility Law Project after seven years working in energy and telecommunications law in a private practice. Prior to this, he served for six years as the Assistant Counsel in the Governor's Counsel's Office responsible for energy, environment and agriculture issues.

Tina Zerbian is the CEO at Cattaraugus Community Action, Inc., a role she has held since September of 1984. Prior to that time, Ms. Zerbian was the Domestic Violence Coordinator, Director of Family and Children's Services, and then Deputy Director at the Community Action Agency, where she began in 1980. Since becoming the CEO, she has worked with her staff and Board to triple the agency's annual budget. Ms. Zerbian is currently the President of the New York State Community Action Association. Ms. Zerbian holds a Masters Degree in Counseling Psychology, and a Bachelor's Degree in Elementary and Special Education. She has been an Adjunct Professor of Sociology and Social Sciences at Jamestown Community College and at St. Bonaventure University. She is a member of the Cattaraugus-Allegany Workforce Investment Board and the WIB Youth Council, and an active participant in the

community's Integrated County Planning Initiative. She is also a member of the Cattaraugus County Sheriff's Advisory Council. Ms. Zerbian is a Certified Credit Compliance Specialist, administering several low-income housing tax credit projects.

Jack Ziegler is Manager of the Customer Assistance Program at Niagara Mohawk Power Corporation. Prior to joining the company, Jack earned a Ph.D. from the University of Toronto and served for more than 21 years in various administrative and pastoral offices for the Roman Catholic Diocese of Syracuse. He is a member of the LIFE Steering Committee and served as co-chair of the Public Benefit Programs Committee for the Public Service Commission's Competitive Markets collaborative proceeding. Jack is a frequent presenter both within the state and nationally on the objectives and impacts of targeted comprehensive low-income utility programs from both business and public policy perspectives.