

**FORM SFEC-126:  
NOTIFICATION OF CONTRACT APPROVAL**  
(S.F. Campaign and Governmental Conduct Code § 1.126)

<b>City Elective Officer Information</b> <i>(Please print clearly.)</i>	
Name of City elective officer(s): Mayor Edwin M. Lee	City elective office(s) held: Mayor, City and County of San Francisco

<b>Contractor Information</b> <i>(Please print clearly.)</i>		
Name of contractor: <b>Institute for Market Transformation</b>		
<i>Please list the names of (1) members of the contractor's board of directors; (2) the contractor's chief executive officer, chief financial officer and chief operating officer; (3) any person who has an ownership of 20 percent or more in the contractor; (4) any subcontractor listed in the bid or contract; and (5) any political committee sponsored or controlled by the contractor. Use additional pages as necessary.</i>		
See attached	BY _____ SAN FRANCISCO ETHICS COMMISSION FILED 12 FEB 24 AM 10:31	
Contractor address: [REDACTED], Washington DC 20036		
Date that contract was approved: 2/21/12		Amount of contract: \$17,800
Describe the nature of the contract that was approved:		
Comments:		

This contract was approved by (check applicable):

the City elective officer(s) identified on this form (Mayor Edwin M. Lee)

a board on which the City elective officer(s) serves \_\_\_\_\_  
Print Name of Board

the board of a state agency (Health Authority, Housing Authority Commission, Industrial Development Authority Board, Parking Authority, Redevelopment Agency Commission, Relocation Appeals Board, Treasure Island Development Authority) on which an appointee of the City elective officer(s) identified on this form sits

\_\_\_\_\_  
Print Name of Board

<b>Filer Information</b> <i>(Please print clearly.)</i>	
Name of filer: Jason Elliott, Mayor's Liaison to the Board of Supervisors	Contact telephone number: ( 415 ) 554-5105
Address: City Hall, Room 200	E-mail: Jason.elliott@sfgov.org

Signature of City Elective [REDACTED] \_\_\_\_\_ Date Signed 2/21/12

Signature of Board Secretary or Clerk (if submitted by Board Secretary or Clerk) \_\_\_\_\_ Date Signed

Washington DC 20036  
 Tel. (202) 525-2883  
 Email IMT: [imtweb@imt.org](mailto:imtweb@imt.org)

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**IMT Board**

**David B. Goldstein, Chair**

David Goldstein founded the Institute for Market Transformation and now serves as the Chair of IMT's board. He is the Energy Program Co-Director for the Natural Resources Defense Council, and has worked on energy efficiency and energy policy since the 1970s.



Dr. Goldstein has been instrumental in the development of energy efficiency standards for buildings and appliances currently in effect at the regional and national level in the United States, Russia, Kazakhstan, and China.

David received a Ph.D. in Physics from the University of California at Berkeley, is a Fellow of the American Physical Society and the recipient of its Leo Szilard Award for Physics in the Public Interest. He received a MacArthur Fellowship in 2002 and the California Alumni Association's 2003 Award for Excellence in Achievement. He is the author of *Saving Energy, Growing Jobs*.

**Peter Graham**

Dr. Peter Graham is Executive Director of the Global Buildings Performance Network, the new ClimateWorks Best Practices Network addressing the mitigation of greenhouse gas emissions from the buildings sector. Peter has been the Technical Advisor and past Coordinator of the United Nations Environment Programme's (UNEP) Sustainable Buildings and Climate Initiative where he has developed and managed many of UNEP's key projects and publications in the building sector. He comes to the GBPN from a position as Head of Discipline for Architecture & Design at the University of New South Wales, Sydney, Australia. In these roles Peter worked closely with the public, civil, and private sectors to assist the global transition to a sustainable building and construction industry.



**Adam Hinge**

Adam Hinge is the managing director of Sustainable Energy Partnerships, a small consulting firm specializing in energy efficiency program and policy issues. Sustainable Energy Partnerships works to initiate and implement viable energy efficiency projects in North America and developing countries around the world. Hinge works as an advisor to utilities, government agencies and others in developing energy efficiency market transformation initiatives. Recent clients of Sustainable Energy Partnerships include the United Nations Development Program, the National Development and Reform Commission of China, the American Council for an Energy Efficient Economy, the World Bank, the International Copper Association, the Consortium for Energy Efficiency, and numerous private energy services providers and consumers.



Hinge has degrees in Mechanical Engineering from Rensselaer Polytechnic Institute, is a registered Professional Engineer in New York, and serves as an Adjunct Research Scholar for Columbia University's Center for Energy, Marine Transportation and Public Policy, a policy research center that is part of School of International and Public Affairs.

**Charlotte Matthews**

Charlotte Matthews is the Vice President of Sustainability for Related Companies, directing corporate sustainability strategy and overseeing green development activities. Related is a real estate developer/owner/manager with a portfolio valued at \$12 billion. The company is in the pre-development stage of a 26-acre mixed-use neighborhood development in midtown Manhattan.



Ms. Matthews is a member of New York City's Green Codes Industry Advisory Committee that reviews and advises on department rules, legislation, research and financing strategies concerning existing building retrofits and new construction. She is a special advisor to Columbia University's Masters in Real Estate Development program.

Prior to joining Related, Ms. Matthews was a Senior Sustainability Manager with Boy's Lend Lease and a green building consultant with Steven Winter Associates. She is a past member of the USGBC's LEED for Labs and LEED for New Construction Core Committees and former chair of Boston's AIA-Committee on the Environment. She has a Bachelor of Science in Environmental Science from Brown University.

**Alan S. Miller**

Alan Miller is a climate change and global environmental expert with more than 30 years experience. He currently is Principal Climate Change Specialist in the Environment Department at the International Finance Corporation, the private sector lending arm of the World Bank Group with general responsibility for climate change policy and analysis. Prior to joining the IFC in October 2003 he was Climate Change manager at the Global Environment Facility (GEF) Secretariat overseeing a portfolio of more than 100 clean energy projects in developing countries. He is a widely published author on climate change, energy, and development including a leading environmental law textbook. His degrees are from Cornell University (A.B., Government 1971) and University of Michigan (J.D. and M.P.P. 1974). He was a Fulbright Scholar in Australia (1977) and Japan (1987).



**Paul Waide**

Paul Waide became the Director of Navigant Consulting's European Energy Practice in July 2009.



From March 2004 until July 2009 he was Senior Policy Analyst in the Energy Efficiency and Environment Division of the International Energy Agency, where he had a prominent role in expanding the agency's work on energy efficiency. While at the IEA he helped the G8 countries to develop their plan of action addressing Climate Change, Clean Energy and Sustainable Development and initiated a process of developing energy efficiency policy recommendations that led to the endorsement of 25 major energy efficiency policy recommendations by the G8 heads of state and IEA member governments. He has provided analysis for the IEA's influential long-range energy scenarios including the World Energy Outlook and Energy Technologies Perspectives publications and is the principal author of some of the agency's main publications addressing energy efficiency policy and technology



He has a Ph.D In Applied Energy from Cranfield University, a M.Sc. from Surrey University and a B.Sc. In Physics from Liverpool University.

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## IMT Staff



**Cliff Majersik**, Executive Director, bears primary executive responsibility for the organization. He directs IMT's research into green building, energy efficiency and property value. Mr. Majersik leads IMT's education and outreach to the finance, appraisal and real estate sectors. He provides expert assistance to federal, state and local officials in developing energy and building policy and legislation. He was a leader in crafting Washington's Energy Act of 2008 and Green Building Act of 2006.

Before joining IMT in 2002, Mr. Majersik served as Director of the eProcurement Project and eBusiness Director for Conservation International's Center for Environmental Leadership in Business. Previously, he worked as a management consultant at the Corporate Executive Board specializing in E-commerce, sales-channel management, and strategic customer relationships. Mr. Majersik advised dozens of firms including Carrier, Chrysler, Cisco, BNSF, Verizon, Coke, Oracle, Sony, Tampa Electric, TI and Marriott. In 1994, he founded a web-based collaboration software company, eventually growing the firm to 25 employees. He currently serves on the board of directors of Greenspace NCR and on the Washington DC Green Building Advisory Council. He received his bachelor's degree, cum laude, in Political Economy from Williams College. He is a LEED accredited professional.

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**Andrew Burr**, Director, Building Energy Rating Program, leads IMT's building energy rating and disclosure activities, providing guidance to policymakers and government agencies, outreach to the real estate and utility sectors, and advocacy for legislative and regulatory policy.

In collaboration with major cities and states, Andrew led the development in 2011 of the nation's first framework for rating and disclosure policy implementation. He oversaw the development of [BuildingRating.org](http://BuildingRating.org), a joint project with the Natural Resources Defense Council establishing an international hub for rating and disclosure policy resources, and the Data Access and Transparency (DATA) Alliance, an industry partnership to enable building owners and managers to access whole-building energy consumption data. He has presented at events throughout the United States and in Europe and China, and has co-authored research papers on building energy labeling with the New York City Mayor's Office of Long-Term Planning and Sustainability and the China Ministry of Housing and Urban-Rural Development.

Andrew was previously a reporter and senior editor with CoStar Group, an international commercial real estate information firm, where he launched and managed the company's editorial coverage of energy and sustainability issues. Andrew received a bachelor's degree in political science from Bucknell University.

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**Mark Chao**, Senior Adviser, leads technical research and writing, especially related to building energy efficiency. Mr. Chao was IMT's first employee. He and David Goldstein founded IMT in 1996.

He has worked as a graduate research assistant to Professor John Holdren and as a research assistant in the Building Energy Analysis Program at Lawrence Berkeley National Laboratory. He has also served as a consultant to the Natural Resources Defense Council (NRDC), Battelle Pacific Northwest National Laboratory, and the Tides Center on energy-efficiency projects in Russia and Brazil. Mr. Chao received his Master of Science degree from the Energy and Resources Group at the University of California at Berkeley. He received his bachelor's degree, summa cum laude, from Yale University.



**Marshall Duer-Balkind**, Program Associate, Building Energy Rating Program, works primarily at the District of Columbia Department of the Environment, where he manages the implementation of [Washington, DC's energy benchmarking program](#) and collaborates with other cities to share best practices. A DC native, he is excited to be working to improve the sustainability of his home city. Marshall brings to his work a strong belief in the power of sunlight and open technology to empower communities, improve markets, and change how we use energy.

Marshall holds a Masters of Environmental Management from the Yale School of Forestry and Environmental Studies, where he focused on the role of energy and land use policies in climate change mitigation and community economic development. He received his Bachelor's degree in Political Science, with a minor in Computer Science, from Oberlin College.

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Donna U. Hope, Policy Analyst for the PlaNYC Greener, Greater Buildings Plan, is an IMT employee working full-time with the New York City government. She assists with quality control and data analysis of newly submitted benchmarking reports; coordinates with GGBP partners and stakeholders; and supports outreach initiatives.

Previously, Hope was program manager of the City University of New York (CUNY) Benchmark Help Center, a helpline to assist in compliance with Local Law 84. Prior to that, she worked in private environmental servicing firms, consulted for an independent food compost company, held multiple research positions, and was a fellow of the National Science Foundation and the Environmental Leadership Program. Hope holds degrees from Spelman College and Rensselaer Polytechnic Institute. She is a LEED Green Associate.



Amanda Kolson Hurley, Communications Manager, coordinates public relations and brings writing and editing expertise to IMT. She was previously the executive editor of *Architect*, the official magazine of the American Institute of Architects. In that role, Amanda reported and edited articles on a wide range of architectural issues, including sustainable design and building performance. In 2010, she was a finalist for a Jesse H. Neal National Business Journalism Award, and *Architect* was nominated for a National Magazine Award for general excellence.

Amanda has also worked as an editor at *Preservation*, the magazine of the National Trust for Historic Preservation. She holds a Ph.D. in literature from the University of Bristol, England, and an M.A. from the University of St. Andrews, Scotland.

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Caroline Kelcher, Program Manager, Building Energy Rating Program, leads IMT's outreach efforts on building energy efficiency policy, providing technical guidance, research, policy, and advocacy support to policymakers, government agencies, and other stakeholders. She holds an M.Sc. in Climate Change and Sustainable Development from De Montfort University in Leicester, UK, where she focused on energy efficiency in the built environment and the analysis of time series energy consumption data in local schools.

Caroline previously worked on the Sierra Club's Global Warming and Energy Team, advocating for an increase in federal fuel economy (CAFE) standards for vehicles, and as the South Atlantic Regional Organizer for the Marine Fish Conservation Network. She is a graduate of Green Corps' Field School for Environmental Organizing and received bachelor's degrees in Environmental Science and Zoology, *summa cum laude*, from the University of Florida. As a North Carolinian, she has strong convictions regarding vinegar-based bbq sauce and sweet tea.

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Andrea Krukowski, Program Associate, works with the Global Building Performance Network on researching best practices for energy code compliance in new and existing buildings. She will also be involved in IMT's building energy rating and disclosure program. Andrea graduated from Brown University with a Bachelor of Science in Mechanical Engineering. While at Brown, Andrea developed a strong interest in sustainable design and energy efficiency through her courses and work with Brown's Department of Facilities Management, which focused on understanding and improving the energy performance of campus laboratory buildings. Previously, she conducted research on the heating, ventilation, and air conditioning systems in large commercial buildings. Andrea is a LEED Green Associate.

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David Lelpziger, Research Associate, focuses on IMT's work with the District's [Sustainable Energy Utility](#) and manages the energy rating website [BuildingRating.org](#). He is also involved in IMT's green leasing and federal buildings programs. David graduated from Brown University with dual degrees in Urban and Architectural Studies. David brings experience in architecture and urban policy, both domestic and abroad. He has worked at Adamstein & Demetriou Architects and the Urban Land Institute in the District of Columbia. Before starting at IMT, he contributed research to urban policy projects in Curitiba, Brazil. David hails from our nation's smallest county, in the Commonwealth of Virginia.

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Ryan Meres, Code Compliance Specialist, is working with the Global Building Performance Network to investigate best practices in energy code compliance in new and existing buildings. He will be documenting case studies on the key challenges and benefits of these best practices in an effort to encourage public and private sectors to improve energy code compliance efforts.

Prior to joining IMT, Ryan was an ICC Fellow at the U.S. Department of Energy where he worked on various federal rulemakings. Ryan also worked at the Georgia Department of Community Affairs as a Building Codes Consultant where he led the adoption of energy and green building codes, including the 2009 IECC and rainwater and gray water codes. He is a LEED

Accredited Professional, an ICC Certified Residential Energy Inspector and holds a Bachelors Degree in Architecture from the Savannah College of Art and Design. His first position after college was as an EarthCraft House Technical Advisor at the Southface Energy Institute, conducting insulation and air sealing inspections and building envelope and duct leakage testing.

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**Robert 'Bob' Sahadi**, Director of Energy Efficiency Finance Policy, leads IMT work to develop and expand energy efficiency financing solutions for homes and commercial buildings. This includes legislative initiatives such as the SAVE Act, a new proposal co-developed by IMT to factor energy cost savings into residential underwriting standards and home appraisal practices.

Bob was previously managing principal of GreenSpace Investment, a green residential financial advisory service. He has held key positions at Fannie Mae, where he was vice president of product development and vice president of mortgage backed securities. While at Fannie Mae, he oversaw the development of the corporation's energy-efficient mortgages and green innovations including Smart Commute for location efficiency, HomeStyle for renovation lending, and a patented protocol to measure residential energy efficiency. He also managed the Home Counselor Online business platform, which served more than 2,000 housing counseling agencies nationwide. He has held multiple positions in the Federal government with the U.S. Department of Housing and Urban Development and the Executive Office of the President, and as chief economist of the Federal Home Loan Bank Board. Mr. Sahadi holds an MBA in finance and an MA in economics from the University of Cincinnati.

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**Lotte Schlegel**, Chief Operating Officer and Program Director, leads operations for the organization including hiring and organizational planning. In addition to her operational role, Lotte works on IMT's energy efficiency and green building programs.

Before joining IMT, Lotte worked as an analyst for the Maine Public Utilities Commission on electric utility rate cases, energy procurement, electric reliability issues, and a residential energy efficiency and clean energy program. She has also worked in scientific research and as a project manager for CESIAK, a Mexican environmental organization. She first became interested in energy efficiency while living in Mexico and relying exclusively on solar and wind power for water pumping and electricity. She is a graduate of Wellesley College.

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**Adam Sledd**, Program Manager, Green Leasing and Federal Buildings Program, works to engage public- and private-sector stakeholders in developing nationally recognized standards for green leasing practices.

As a founding partner at Sledd Properties LLC, Adam brings almost a decade of commercial real estate management experience to IMT. Prior to joining IMT, Adam was a business development and marketing associate at Ready Corporation Worldwide, a leading provider of pre-engineered sustainable building systems. His work there included developing housing proposals for the U.S. Department of Homeland Security as well as the governments of Ghana and Haiti. He has also worked extensively in the film and publishing industries. Adam received his bachelor's degree in Media Studies from Pitzer College and is currently working on his MBA at American University.

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**Sarah Stellberg**, Program Manager, Economic and Policy Analysis, oversees IMT's quantitative and statistical research. Sarah works across all IMT programmatic areas, with a special emphasis on energy-efficiency financing, building energy code compliance, and utility sector energy efficiency policies and programs.

Prior to joining IMT, Sarah contributed to the Environmental Law Institute's work on international environmental governance, including a resource manual on climate change adaptation. She also served as a Research Assistant at RCF Consulting, where her work focused on non-market impacts of Great Lakes water resources. She has travelled extensively throughout Europe and Latin America, where she spent a semester studying an Interamerican Development Bank healthcare initiative in Chile. Sarah graduated summa cum laude from Whitman College with a bachelor's degree in Economics and a minor in Spanish. She is a native of Chicago, Illinois.

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Consultants





**Ron Nelson**, Consultant, leads IMT's contribution to the COMNET collaboration. COMNET aims to establish a national standard for rating commercial buildings and to credential building energy raters, auditors, and trainers. Working with stakeholders in the building assessment industry, his efforts focus on standards for business and worker credentials and the creation of a COMNET business entity to ensure quality and to manage emerging requirements.

Ron's consulting clients include a range of disciplines. He comes to IMT after completing a Masters of Architecture at the University of New Mexico in 2009. He was a physicist with the Los Alamos National Laboratory for 31 years, the majority of which he spent working at the Lujan Neutron Scattering Center. He received a PhD in Physics from Duke University in 1971, an MBA from the University of New Mexico in 1997, and a BS in Physics and Mathematics from Florida State University in 1987.

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**Gary Klein**, Consultant, has been intimately involved in energy efficiency and renewable energy since 1973. One fifth of his career was spent in the Kingdom of Lesotho, the rest in the United States. He has a passion for hot water: getting into it, getting out of it and efficiently delivering it to meet customer's needs. Recently completing 19 years with the California Energy Commission, his new firm, Affiliated International Management LLC, provides consulting on sustainability through their international team of affiliates. Gary received a BA from Cornell University in 1975 with an Independent Major in Technology and Society with an emphasis on energy conservation and renewable energy. Gary is working under contract to IMT to increase the efficiency of hot water design and distribution in model building energy codes.



**Jordan Engel**, Consultant, is focusing on digital strategy for IMT and is currently engaged on projects involving data-standards and information-sharing, visualization, website design, and general strategy.

Jordan was already a DC resident by the time the EPA was created. After studying neuropsychology at Wesleyan University, he returned to DC and worked at a prestigious law firm before embarking on a career in information technology. Work as a programmer and tech lead at companies ranging in size from 1 to 90,000 was followed by several years consulting to homeland security and intelligence clients in telecommunications, GIS and visualization, strategy, and organizational development.

When not flying radio-control helicopters, taking award winning photographs, or both, he now works full time on providing product management, technology, and organizational strategy to non-profit organizations or clean-technology companies in the DC area.



**Dick Meyer**, Building Codes Program Director, leads IMT's efforts to strengthen building codes and improve energy efficiency in residential and commercial buildings across the United States. An enthusiastic advocate for better building practices, his work includes development of innovative practices, policies, incentives and technologies towards this end.

As a building science professional, Dick has many years experience in residential, commercial and industrial construction in addition to being a Certified Building Official and a HERS Certified Rater. A veteran of many model code hearings, he is a member of the International Code Council as well as the National Association of Home Builders. Following graduation from Virginia Tech (A Hokie!), he was commissioned and received his wings as a Navy pilot.

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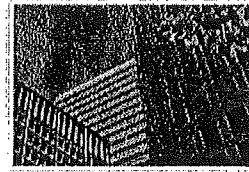
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## Funding

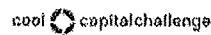
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Current and past funders include:

- ◊ [Alliance to Save Energy](#)
- ◊ [District of Columbia Department of the Environment](#)
- ◊ [District of Columbia Department of Consumer and Regulatory Affairs](#)
- ◊ [Downtown Washington Business Improvement District](#)
- ◊ [Energy Foundation](#)
- ◊ [Kresge Foundation](#)
- ◊ [Natural Resources Defense Council](#)
- ◊ [New Building Institute](#)
- ◊ [NYSERDA](#)
- ◊ [Pacific Gas and Electric Company](#)
- ◊ [Renewable Energy & Energy Efficiency Partnership](#)
- ◊ [Rockville, Maryland](#)
- ◊ [Trust for Mutual Understanding](#)
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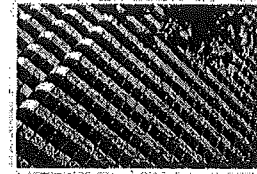
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## Partner Organizations

The Institute for Market Transformation collaborates with many organizations and agencies to advance the work of energy efficiency and environmental protection.

These include:

- [Alliance to Save Energy](#)
- [American Council for an Energy Efficient Economy](#)
- [Architectural Energy Corporation](#)
- [Building Codes Assistance Project](#)
- [Building Energy Efficient Codes Network](#)
- [Center for Energy Efficiency](#)
- [China-US Energy Efficiency Alliance](#)
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