Technical Assistance Resources:
What's Available Now and Previewing What's to Come

September 28th, 2022

Prepared for the SEP National Training Forum

Agenda

1. Message from SEP Acting Program Manager
2. Existing Technical Assistance Resources
3. Forthcoming Technical Assistance Resources under the Bipartisan Infrastructure Law

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U.S. DEPARTMENT OF ENERGY

Office of ENERGY EFFICIENCY & RENEWABLE ENERGY

Technical Assistance Resources for States

Sean Williamson, Advisor for Partnerships and Technical Assistance, U.S. Department of Energy
Laura Carpenter, Advisor for Partnerships and Technical Assistance, U.S. Department of Energy

Partnerships and Technical Assistance (P&TA) Team

Working in partnership with states, local governments, K-12 school districts, and stakeholders to:

- Convene **PEER EXCHANGES** to showcase replicable models
- Create **TOOLS AND SOLUTIONS** that address pervasive barriers
- Provide **TECHNICAL DATA AND INFORMATION** from leading experts

Goal:
Maximize energy and cost savings

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Public-Sector Partnerships

239 Partnerships*

38


State Governments

Financing Investments

ESPC Accelerator
$2.1 Billion

C PACE Working Group
$70 Million

173


Local Governments

Buildings Savings

Better Buildings Challenge
$1.3 Billion
133 Trillion BTU
3.3 Billion
Gallons of Water

28


K-12 School Districts

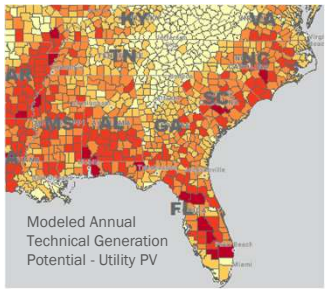
Infrastructure Savings

Sustainable Wastewater Infrastructure of the Future (SWIFt) Accelerator
131 Million kWh

Outdoor Lighting Accelerator
$48 Million
per year

Cumulative unless noted otherwise.
** Public-sector partners since 2011 that signed a formal partnership agreement and worked or are working toward a voluntary goal.*

Develop Plans and Programs



Modeled Annual Technical Generation Potential - Utility PV

Initiatives

Sustainable Wastewater Infrastructure of the Future (SWIFt) Initiative

- **Goal:** to engage **300** wastewater treatment facilities in a voluntary partnership to help them achieve **5% short-term** and **25% long-term** facility-wide energy savings and implement one next-generation technology (e.g., renewable energy or resource recovery)
- **Progress:** as of August 2022, **111 signatory partners** that represent **256 wastewater facilities** across **40 states.** These facilities serve over 25 million people (8% of nation's population) and treat over 4 billion gallons of wastewater daily (~13% of wastewater treated by publicly owned facilities).
- **Results**: the SWIFt Toolkit helped more than 70 SWIFt Phase 1 (2016-2019) partner facilities cumulatively achieve almost **7% (131 million kWh)** in energy savings and put plans in place for **30% long-term** energy savings. SWIFt Phase II partners have identified over **195 million kWh** in potential energy savings

Sustainable Corrections Infrastructure Partnership (SCIP)

- **Goal:** a voluntary partnership launched in January of public departments of corrections working with DOE over three years to achieve **portfolio-wide energy savings of 20%** and create replicable solutions to catalyze energy resilience
- **Progress:** as of July 2022, **17 partners** (16 states and one county) that represent almost **30%** of state correctional facilities

Example Solution

How Distributed Energy Resources Can Improve Resilience in Public Buildings

"How to" guide that describes the benefits of integrating energy efficiency with other distributed energy resources to assess resilience benefits through the specific application of two DOE tools (REopt Lite and DER-CAM), including resilient energy system cost reductions of over $400,000 at a single critical facility through energy efficiency

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Establish Financing

Example Solutions

ESPC Toolkit

Tools and resources that **25** state and local government partners developed in partnership with DOE (2014-2016) to invest **$2.1 billion** in energy efficiency and create a legacy to support ESPC into the future, including sector-specific primers (K-12 schools, fleets/fueling infrastructure, water resource recovery facilities, and small projects).

eProjecteXpress

eProject eXpress (ePX)

A streamlined, tailored pathway for state and local governments to track, report, and demonstrate the ongoing value of their energy savings performance contracting projects and programs. Built on the established eProject Builder data management platform, ePX was designed expressly to meet the unique data management and reporting needs of the municipal and state governments, universities and colleges, K-12 schools, and hospitals (MUSH) market.

Commercial Property Assessed Clean Energy (C-PACE) Toolkit

DOE's C-PACE Toolkit is an outcome of DOE's C-PACE Working Group. The C-PACE Working Group was a three-year partnership (2018–2020) of state and local governments that worked together to learn about, launch, and refine C-PACE financing programs. By 2021, the working group stimulated **$70 million** in C-PACE investments among **17** state and local partners. The Toolkit provides a four-part compilation of resources that any state or local government can use to navigate barriers and benefit from C-PACE financing.

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Implement Data Management

Initiatives

Better Buildings Challenge (BBC)
75+ state, local government, and K-12 school district partners have committed to an energy savings target of 20% within 10 years

DOLLARS SAVED

ENERGY SAVED

WATER SAVED
3.3 BILLION GALLONS

GOAL ACHIEVERS
25 PUBLIC-SECTOR PARTNERS

Cumulative public-sector partner achievement since 2011

Better Climate Challenge (BCC)

- **Goal:** Through the BCC, organizations can partner with DOE to **reduce portfolio wide GHG emissions by at least 50% within 10 years**. DOE will provide technical assistance and opportunities to learn and share actionable best practices for carbon reduction
- **Progress:** As of August 2022, BCC has 21 public-sector partners (three K-12, one state, 17 local partners)

Example Solution

Energy Data Management Guide
Interactive, online platform that provides a seven-step approach to establish a robust and sustainable energy data management program that can sustain energy savings of 2% a year.

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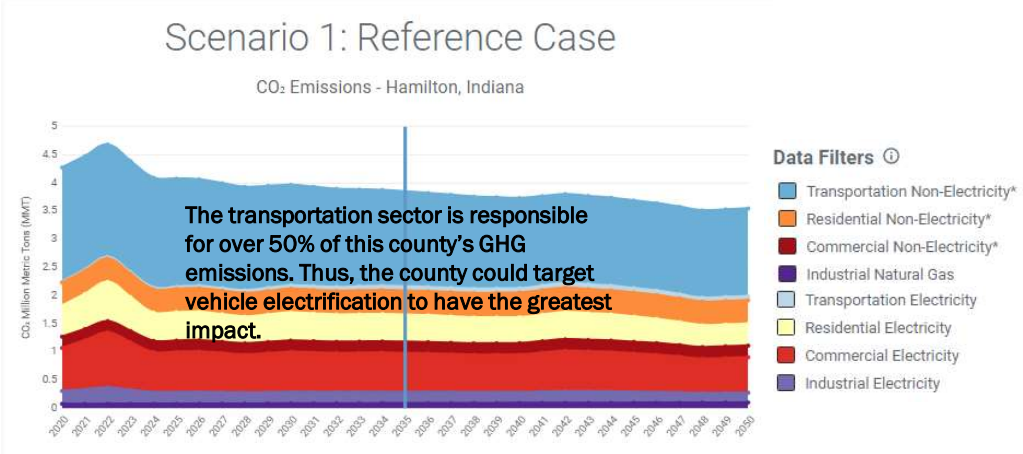
Popular Tools & Resources: State and Local Planning for Energy (SLOPE) Platform

SLOPE is a free, easy-to-use online platform to support data-driven state and local energy and decarbonization planning

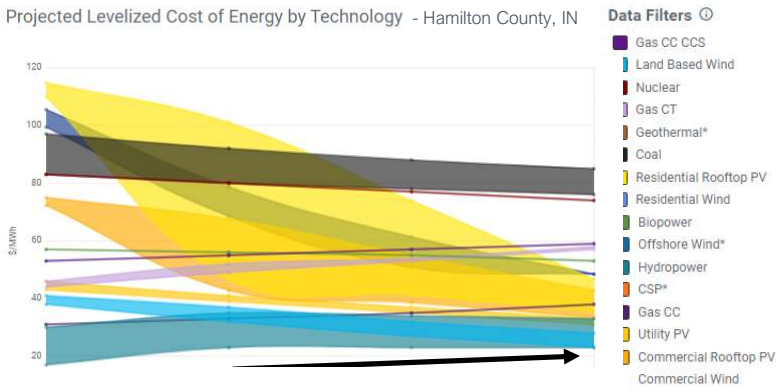
Scenario Planner

Build, visualize, and compare the impacts of different clean energy strategies (energy efficiency deployment, grid decarbonization, and electrification) on future energy consumption, CO_2 emissions, and system costs within your state or



Data Viewer

Explore interactive maps and charts of energy efficiency, renewable energy, sustainable transportation, energy equity, energy cost data, and more at the state-, county-, city-, and census tract-levels.



SLOPE is responsive to user feedback with new features and data regularly added to enhance the platform's impact.

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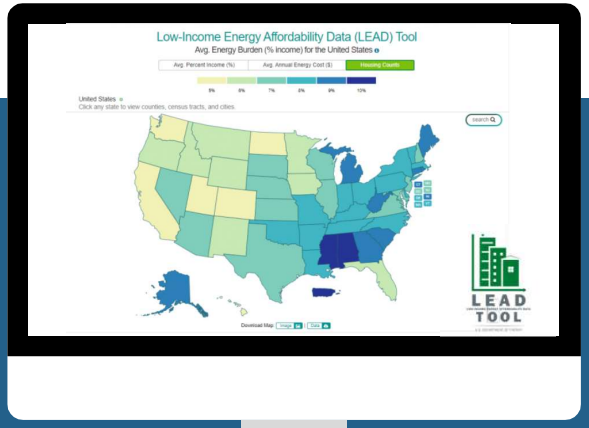
Popular Tools & Resources Cont.

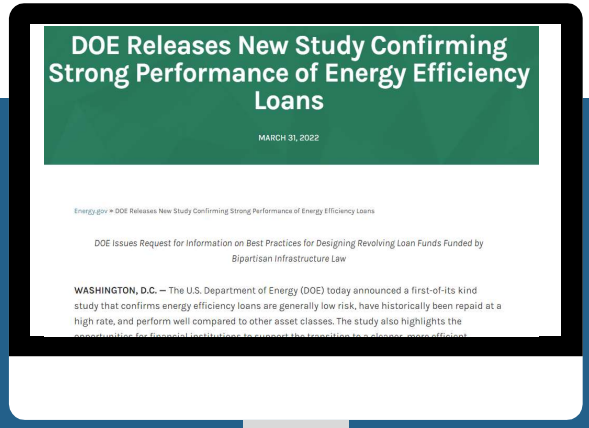
Low-Income Energy Affordability Data (LEAD) Tool

- A web-based interactive tool that enables stakeholders to visualize energy burden and housing characteristics across the U.S.
- Provides customizable data, maps, and charts available at the national, state, city, and census tract level for all 50 states plus Puerto Rico and Washington, D.C.

Long-Term Performance of Energy Efficiency Loan Portfolios

- A first-of-its-kind study that confirms energy efficiency loans are generally low risk, have historically been repaid at a high rate, and perform well compared to other asset classes.
- "The findings in this study are a compelling invitation to financial institutions to invest with homeowners, states, and local governments to maximize clean energy deployment under the Bipartisan Infrastructure Law and beyond."
  - U.S. Secretary of Energy Jennifer Granholm





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Empower Organizations

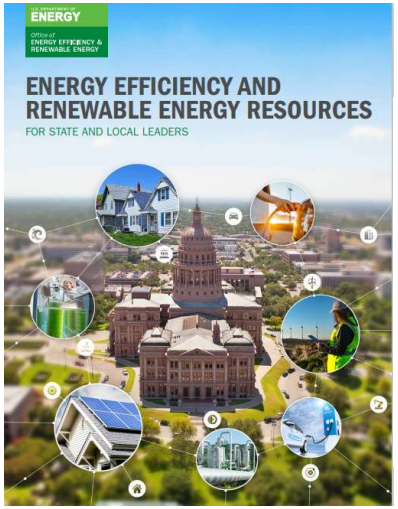
Outreach

State and Local Spotlight
Monthly newsletter with more than 33,000 subscribers: http://energy.gov/eere/slsc

State and Local Solution Center
Over 400 tools, resources, and best practices

State and Local Inbox - stateandlocal@ee.doe.gov
We are committed to a three-business-day-or-less response time for all state, local government, and K-12 school district inquiries

Better Buildings Webinars
Webinars reviewing the most pressing topics for energy professionals to save resources



Download Our Resource Guide: Energy Efficiency and Renewable Energy Resources for State and Local Leaders

Technical Assistance and Transformation Collaboratives

For IIJA State Energy Program Formula Grants (Sec. 40109)

Goals of this session

1) Review 40109 technical assistance (TA) approach – Transformation Collaborative (TC) opportunities, broad-based TA, and structure of TA delivery

2) State expectations and benefits of TC's

3) Example collaborative roll-out

4) Next steps and state questions/concerns

What is a transformation collaborative?

Cohort-based, voluntary assistance on broad high-impact topics.

Topics are flexible and tailored to common state goals and SEP requirements.

The TA will provide:

- Support for states to meet new statutory requirements
- State flexibility to leverage a myriad of 3rd-party and subject-matter experts
- Alignment with established DOE and Admin goals: J40, increased workforce, energy security, reduction of energy costs and emissions
- Planned approach for measuring success; state autonomy in objective/goals
  - *Metrics and impacts will be decided amongst states throughout implementation of TCs; Metrics may be the focus of the cohort-based outcomes or pre-determined metrics may be used to track other types of outcomes*

Topics of Transformation Collaboratives

Five Key Focus Areas	Possible State Activities/Potential Topic Outcomes
Energy Planning: New mandatory SEP element on transmission and distribution planning	T&D Convenings, local and tribal government T&D planning, state-cohort and goal-based technical analysis/modeling, stakeholder engagement coordination, siting solutions and modeling
Energy Planning: System-wide planning for grid expansion, modernization & clean technologies	Coordination with other BIL funding streams and TA (in coordination with GDO), policy analysis, EV load on grid capacity
State Energy Security Plans (SESP)	Assistance with grid-hardening, protection, risk assessment (in coordination with GDO and CESER), stakeholder engagement coordination, support in addressing/implementing SESPs
Community Energy Planning	Workforce training plan, local adoption of community benefit agreements, energy planning and policy support around defining disadvantaged communities and J40, designing impactful programs, calculation of benefits, stakeholder engagement
Clean Energy Manufacturing Planning	Policy support for domestic manufacturing and supply chains,

Topics align with broad state priorities, existing state activities and planned investment

Topics are intended to be activities for *possible or potential* assistance in a TC

Core Principles

Outcomes determined by the states' participation

Reduce state burden in convenings and working with Labs

Transformation Collaborative – Expectations and Benefits

Benefits:

- Reaching state goals through DOE facilitation of multiple TA providers including consultants, universities, DOE Natl Labs, NGOs, and convenors
- Advanced deployment timelines by addressing collective technical needs through tool training, modeling and analyses

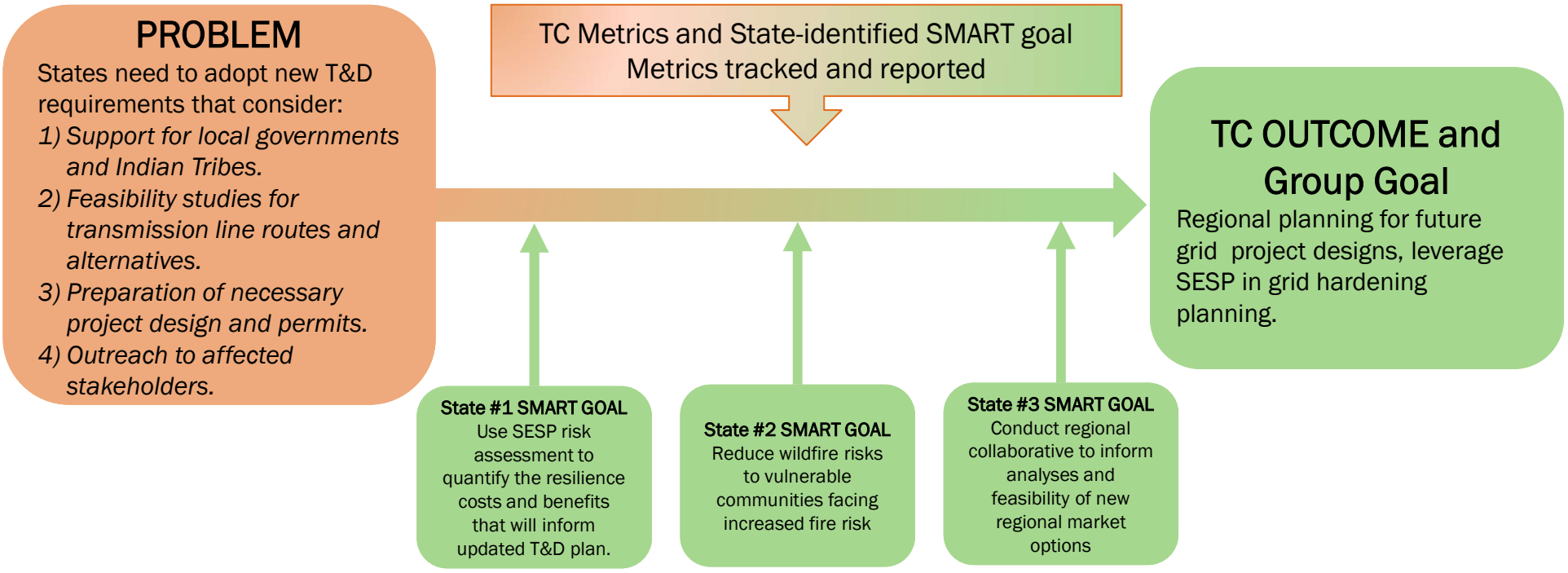
Expectations:

- A financial appropriation of funds (minimum $45,000) into the topic of choice
- Creation of a specific, measurable, actionable, realistic, and time-bound (SMART) goal:

  Goals will be developed as the scoping process for each TC begins. States will create a collective outcome related to the TC topic area that each state will create their own individual state SMART goal around.

Components of Transformation Collaborative

Topic: Transmission & Distribution



Example and Steps – Transformation Collaborative Lifecycle

1. **Opt-in.** Sign up for an opt-in area or areas by submitting a TC Opt-In template form with application
   a. Discuss with your office and key stakeholders (agencies, local governments, NGOs) to define a list of needs and priorities
2. **Talk with DOE.** Engage in a discussion with DOE and states to develop scope and design of the TC
   a. DOE will host several 'listening sessions' with the primary aim to listen closely to state needs
   b. Calls may include a topic-relevant lab or TA provider to facilitate the scoping process
3. **Define Goals.** Designate cohort-wide TC goals and milestones
   a. DOE will draft for input by states, including outcomes and identification of indicators meeting key programmatic design goals such as J40, economic development and workforce, and support for deployment-related needs.
4. **Refine Goals.** Develop TC Action Plan
   a. In partnership with fellow cohort states, define feasibility and capacity for high impact, and realistic admin burden
   b. Clarify expectations to allocate and plan for TC participation.

Example and Steps – Transformation Collaborative Lifecycle

5. Review and Sign Action Plan. Based on state input and goals, DOE will develop an Action Plan for the TC

a. Action plan includes the following elements: identification of relevant TA providers and NGOs, project scope and timeline phases, priority goals, success metrics, stakeholder engagement processes, project activities with descriptors of each party's responsibilities (TA provider, DOE, and SEOs) and deliverables with go/no go's
b. Action plan will define contract with technical and facilitation service providers
    i. Example #1 - A lab contract where states can get dedicated lab time for analysis and other program design support
    ii. Example #2 - Contract with NASEO to convene states for a facilitated discussion, policy and program support and written summary of results

6. Participate in TC

a. Participate in regular calls with DOE, Labs and TC cohort
b. Provide written updates on progress in PAGE
c. Offer feedback and opportunities to improve, expand or refine the TC discussion topics,
d. Explore how TCs can support future SEP funded activities or braiding of other IIJA funding opportunities

What is Broad-based TA?

- No opt-in required
- Structure will be based through WIP-proven TA models, e.g. accelerators and working groups (SWIFt), Better Buildings Challenge, toolkits, data, case studies, outreach & dissemination
- Topics covered will include:
  - RLF Capitalization Grant Programs
  - J40/equity - identification of DACS; development and tracking of metrics
  - Workforce development – use of community benefit agreements (CBAs) with local governments; workforce training, matching workforce needs to technology development/deployment in the state and communities, including DACs, etc.
  - Private financing and leveraging of IIJA funds

Next Steps

Milestone	Date
Funding Announcement – Formula ALRD	By or before 8/29/22
Full Applications Due	12/05/22
Awards Made	1/31/23 – 3/31/23
Transformation Collaboratives Launch and Scoping Process	February – June 2023
Transformation Collaborative Go/no Go Decision	June 2023
Go/No Go Decision to continue TC, or offer new iteration with new allocation of funds	June 2025

"Insert your own idea here" – we're here to take your feedback, answer your questions and adapt the TCs to meet your needs!