



State Energy Program Office Hours

February 16th, 2024
12:00 – 2:00 PM ET



Agenda

- Welcome
- Upcoming SEP Events and Engagements
- Feedback Request: Workforce development case studies and best practices
- Clean Energy Innovator Fellowship: Host application deadline on 3/5
- SEP BIL Technical Assistance Implementation Plan
 - SEP BIL Direct Technical Assistance
 - Transformation Collaboratives
 - Feedback and Discussion
- SEP Monitoring Overview
- Open Q&A and Discussion

Upcoming Engagements with SEP

Date	SEP Engagement
February 21st 1:00 – 2:00 ET & February 28th 1:00 – 2:00 ET	Peer Exchange Opportunities: <i>RLF Program Design</i>
March 14th 1:00 – 2:30 ET	Quarterly Round Up: <i>Reporting: SEP Annual, SEP-BIL, and BIL Supplemental</i>
March 15th 12:00 – 2:00 ET	Office Hours: <i>Previewing Federal in Perpetuity Close Out for RLF and Financing Programs</i>
April 2nd - 4th	DOE's Better Buildings, Better Plants Summit in Washington, DC
April 19th 12:00 – 2:00 ET	Office Hours: <i>Reporting: RLF QPR and RLF Supplemental</i>

- Please send suggested topics, questions, or other feedback to StateEnergyProgram@hq.doe.gov and your Project Officer
- Visit the [SEP TA Webpage](#) to find the most updated schedule of upcoming Office Hours and Quarterly Round Ups

Workforce Development: Seeking Feedback

- State interest in best practices and case studies related to workforce development
- For discussion: what are the most optimal formats for this information?
 - White paper
 - 1- to 2-page factsheets/case study write-ups
 - Interactive web platform
 - Other

Clean Energy Innovator Fellowship (CEIF)

Apply by March 5th!

- DOE's CEIF program funds recent graduates and energy professionals to support critical energy organizations in advancing clean energy solutions that will help decarbonize the power system, electrify transportation and industry, and make the U.S. power system more resilient, equitable and inclusive.
 - Each Fellow's time is supported for up to two years, with opportunities for peer-to-peer learning and professional development support.
- Program Purpose:
 - Support critical clean energy institutions with additional capacity.
 - Attract new, more diverse talent to clean energy careers.
 - Expand job opportunities to early career energy professionals.
- Apply to become a host institution for the CEIF program by March 5th here: <https://www.energy.gov/eere/jobs/clean-energy-innovator-fellowship>
- Preview the application here: https://www.energy.gov/sites/default/files/2024-01/ceif-host%20institution-application-preview_01-2024.pdf

SEP BIL TA Implementation Plan Overview



U.S. DEPARTMENT OF ENERGY

State Energy Program

Bipartisan Infrastructure Law
Technical Assistance Implementation Plan

March 2024



SEP BIL TA Implementation Plan: Timeline

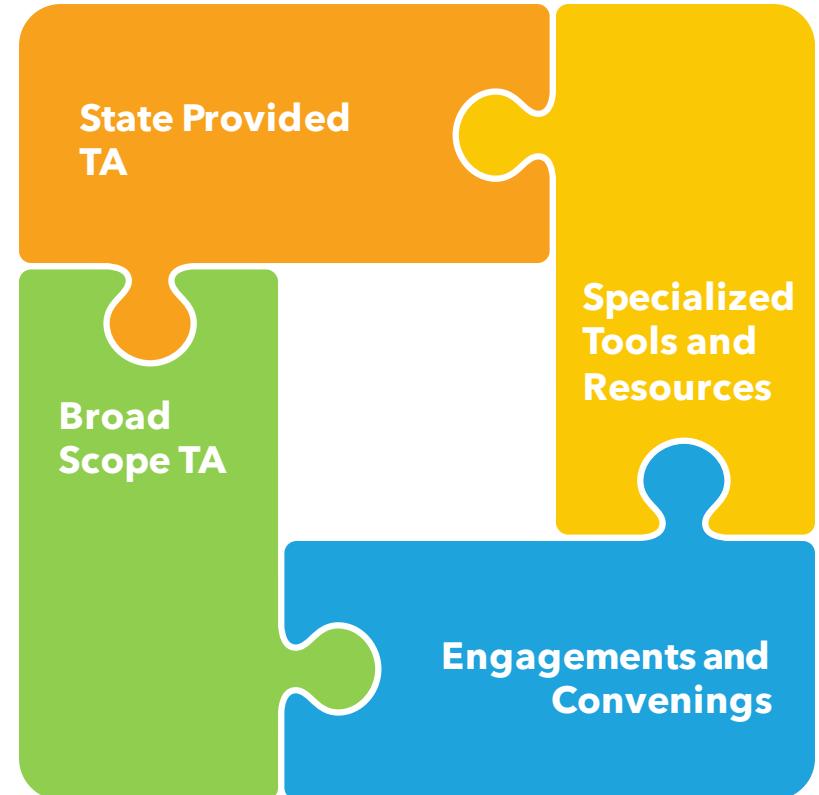
September 2023	SEP holds stakeholder engagement workshops and office hours for all State Energy Offices to gather feedback on TA needs
October - December 2023	SEP drafts BIL TA Implementation Plan
January 2024	SCEP leadership and NASEO review draft plan
Mid-February 2024	SEP gathers ongoing feedback on draft from states through written means and office hours
March 2024	SEP releases finalized BIL TA Implementation Plan
April 1st – 12th	Request form for 1st round of SEP BIL Direct TA opens
Mid to Late April	Review and scoping of Direct TA requests with states
Early May	Execution of TA requests with 3rd party provider(s) begins

SEP BIL TA Workshops

SEP invited all State Energy Offices to participate in a series of stakeholder engagement workshops designed to build off ongoing conversations and inform and advise the development of the SEP BIL TA program.

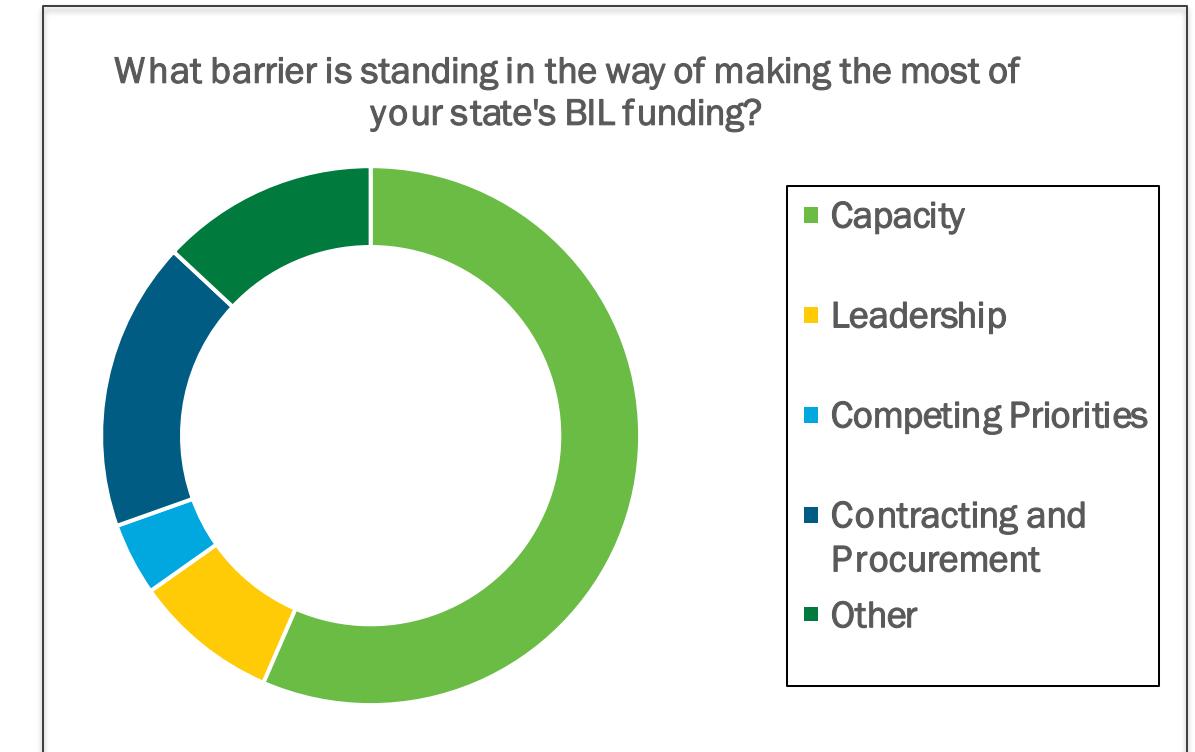
Throughout September 2023, SEP hosted four days of workshops, with each day split into 6 sessions by NASEO region. Topics covered included:

- Broad Scope Technical Assistance
- Engagements and Convenings (e.g., conferences, cohorts, workshops, trainings)
- Specialized Tools and Resources (including Revolving Loan Fund and Transformation Collaboratives)
- General Discussion (covering topics like Stacking/Braiding funding and Federal Compliance)



Workshop Findings & Key Takeaways

- Development of BIL TA should be an iterative process - needs may be different in two years vs. today
- Federal compliance and reporting are key challenges with BABA, Davis Bacon, and NEPA being the main bottlenecks.
- TA can most effectively alleviate capacity restraints through centralized information, flexible TA options, and examples of program design
- Peer exchanges and cohorts will be valuable resources to share use case examples and best practices



BIL TA Implementation Plan: Strategy & Implementation

- DOE collected all SEP BIL TA feedback and bucketed key challenges and needs into Topics Areas, which include:

Limited staff capacity

Assistance in meeting reporting requirements and regulations

Guidance on braiding/stacking funding

- We then created strategies with corresponding projects to address the key challenges and needs. High-level strategies with solutions include:

Direct TA with subject matter experts

Educational Repositories and Guidebooks for DOE Resources

Trainings and other Engagements

Peer Exchange Opportunities and Cohorts

- This process will be iterative, and the strategies and action items SEP undertakes will be flexible as states' needs change throughout BIL's implementation.

Direct TA with Subject Matter Experts

TA Project	Description	Delivery Time (Calendar Year)
Direct 1-on-1 TA	Direct 1-on-1 TA provides dedicated technical expertise to states on specific, requested topics. Topics will be collaboratively designed with states and DOE.	Updated Quarterly
Clean Energy Innovator Fellowship Program	The Clean Energy Innovator Fellowship (CEIF) program funds recent graduates and energy professionals to support states to advance clean energy solutions that will help decarbonize the power system, electrify transportation and industry, and make the U.S. power system more resilient, equitable and inclusive.	Annually
Davis Bacon Reporting Platform	This online platform will provide states with guidance, tracking, and expertise to meet reporting requirements related to the DBA.	Updated Monthly
State Energy Security Plan TA	CESER will provide TA for states, comprehensive support for SESP review, and long-term TA. This includes implementing and validating SESPs. Updated resources are included on the SESP Resources page.	Updated Quarterly

Educational Repositories and Guidebooks

TA Project	Description	Delivery Time (Calendar Year)
State and Local Solution Center	This online database includes a library of existing and new TA resources.	Updated Quarterly
SEP TA Webpage	This webpage provides updated information about SEP BIL and annually funded TA programs and initiatives.	Updated Monthly
RLF Resource Library	The RLF Resource Library provides foundational information to learn about, design, and manage an RLF program.	Updated Quarterly
State Energy Program Guidance	This webpage provides documents to help states report and manage SEP program funding, including BIL funding.	Updated Monthly

Trainings and Other Engagements

TA Project	Description	Delivery Time (Calendar Year)
Training and Webinars	The updated training webpage will provide easy-to-navigate information and recorded trainings and webinars.	Beginning in Q4 2023
Office Hours	SEP is hosting monthly office hours to present TA information, engage in direct Q&A with SMEs, and host a general discussion on SEP matters.	Monthly, beginning in Q4 2023
SEP Quarterly Roundups	SEP is leading quarterly meetings to share upcoming administration deadlines, present administrative information, engage in direct Q&A with subject matter experts, and host general discussion.	Quarterly, beginning in Q4 2023
SEP Bulletin	The monthly SEP Bulletin will highlight opportunities for TA, updates from states, information about upcoming events, and other DOE resources.	Monthly, beginning in Q4 2024

Peer Exchange Opportunities and Cohorts

TA Project	Description	Delivery Time (Calendar Year)
Transformation Collaboratives	TCs represent a voluntary opportunity to participate in a learning and best practices partnership with DOE, focused on topic areas that align with Congressional direction and state interest.	Q3 2024
Peer Exchanges	Regularly recurring, open channel of communication for states to exchange best practices, and for DOE to support states quickly and efficiently. Specific topics will be determined based on state feedback.	Ongoing, beginning in Q2 2024
Campaigns and Cohorts	Cohorts and Campaigns are partnerships between DOE and states to develop solutions for common barriers, leveraging innovative and best-practice approaches for success. For example, a finance-focused campaign, similar to the ESPC Campaign , could be offered to states.	Ongoing, beginning in Q2 2024
Federal Funding Stacking Opportunities Peer Exchange	In collaboration with DOE, this cohort of states will work together to learn and share examples on how to stack and braid federal funding across DOE and other federal agencies.	Q2 2024

We want your feedback!



Share your thoughts and questions at the end of this presentation



Send written feedback to your SEP Project Officer by March 1st



Send written feedback to Erin.Taylor@hq.doe.gov,
Monica.Andrews@hq.doe.gov, and/or
StateEnergyProgram@hq.doe.gov by March 1st



DOE will provide an annual report, quarterly TA updates and collect feedback on an ongoing basis

SEP BIL TA

Implementation Plan:

Direct TA Process & Topics

TA Intake and Management

TA Request Intake

- States submit requests through **Microsoft Forms** and/or through their PO to submit

TA Request Management

- SEP will triage, **scope projects** and match requests

TA Request Delivery

- TA providers **will** include national labs and 3rd party contractors

Direct TA Schedule

2024

April 1-12
•TA request intake form opens

Early May
•TA delivery begins

Late July
•DOE works with states to scope TA

October 1-15
•TA request intake form opens

Early November
•TA delivery begins

Late January
•DOE works with states to scope TA



Late April
•DOE works with states to scope TA



July 1-12
•TA request intake form opens



Early August
•TA delivery begins



Late October
•DOE works with states to scope TA



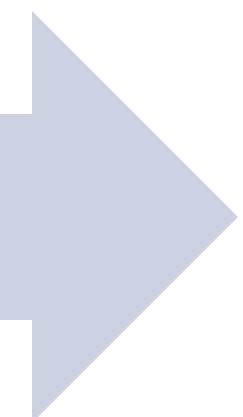
January 1-15
•TA request intake form opens



Early February
•TA delivery begins

2025

Late January
•DOE works with states to scope TA



Measuring Progress and Impact

Measuring Progress

- **DOE will measure and share the outputs, benefits and outcomes of TA and the SEP BIL TA Implementation Plan.** As we develop projects, DOE will continue to build in progress reporting/ measuring as needs and requests change. DOE recognizes that state needs may change as BIL funds are expended and new programs are stood up; **this process will be iterative, and DOE will plan to gather consistent feedback on what resources are most helpful to states.**
- DOE will measure progress of TA by tracking outputs, including TA requests, recipients, performers, and performance information. DOE will track information from the time of application submission through after the engagement has ended.

Communicating Impact

- To measure the impact of TA to states, states should plan to **include the results and outcomes of TA in their BIL reporting** to DOE (e.g., PAGE Quarterly Progress Reports, SEP BIL Supplemental).
- To amplify impact across the country, DOE will ask states **share lessons learned and best practices** with other states via peer exchange, webinars, cohorts, and other informative forums.
- A **SEP BIL TA Annual Report** will include outputs of TA requests and projects, qualitative and/or quantitative impacts, and high-level budget tracking. On a quarterly basis, DOE will also share, at a high level, the types of TA requested and provided to states

Brainstorm: Potential Topics for SEP BIL Direct TA

- Analytics and Modeling
 - Clean energy jobs forecasting, workforce development, application of specific DOE tools (REopt, SLOPE, LEAD, etc.), Justice40 support, Transmission and Distribution Planning (in coordination with other DOE offices)
- Energy Education Materials & Resources
 - Use cases, guidebooks, informational resources, financing, planning for multiple funding streams, etc., for states and stakeholders
- Energy Planning
 - Integrating new technologies, benchmarking, clean energy implementation, state and federal incentives for adoption
- Other

Questions and Feedback?

SEP BIL TA Implementation Plan: Transformation Collaboratives (TCs)

Transformation Collaboratives

Help states make significant progress towards their goals through peer exchange and additional topical technical assistance from subject matter experts.

Transformation Collaboratives

Benefits

- Participation is voluntary
- States will receive TA from subject matter experts, National Labs, and DOE
- TA will be tailored to best meet the needs of the participating states
- Access to additional peer exchange and peer networking opportunities
- Creation of targeted resources and analyses
- SEO impacts will be amplified through expert TA and peer exchange

Requirements

- Completed *Transformation Collaboratives Opt-in Template*
- *Transformation Collaborative* Activity in PAGE Annual File
- Dedication of SEP BIL Formula Allocation to TC-related efforts, e.g., staff time, program execution activities
 - \$45,000 for one TC
 - \$25,000 per activity for three TCs
- Active participation in TC discussion, TA efforts

Transformation Collaboratives Launching in 2024

**9
States**

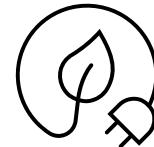
Energy Planning
• Transmission and Distribution Planning

**5
States**

Energy Planning
• System-wide Planning for Grid Expansion, Modernization, and Clean Energy Technology Integration

**7
States**

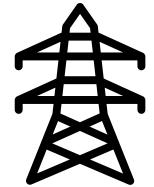
Community Energy Planning



Energy Planning: Transmission and Distribution (T&D) Planning

Goal: Enhance States' Transmission and Distribution Planning Efforts

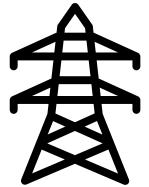
How will DOE be helping states with their T&D Planning efforts?



- ✓ DOE will seek feedback from the participating states on their specific T&D planning technical assistance needs.
- ✓ States will have the opportunity to participate in DOE-facilitated engagements specific to those TA requests.
- ✓ SEP team will explore different TA providers and work with them to develop a plan to specifically address states' T&D planning efforts.

Energy Planning: Transmission and Distribution (T&D) Planning

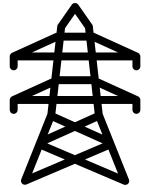
Examples of TA provided by the SEP Team may include:



- Stakeholder Engagement: Identify best practices to engage stakeholders regarding T&D.
 - For example: DOE could help state and local planning efforts to accommodate increased electricity loads from electric vehicle expansion.
- Equity: Identify strategies on how to better and more realistically incorporate equity in T&D.
- Grid Modernization Strategies: Provide assistance in grid modernization design to provide maximum economic impact and resiliency when implementing clean energy deployment.

Energy Planning: Transmission and Distribution (T&D) Planning

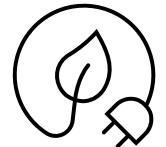
Collaboration with DOE Grid Deployment Office (GDO):



- The SEP team will be collaborating with GDO on providing support to states with their energy planning efforts, including Transmission and Distribution as well as with System-wide Planning for Grid Expansion, Modernization, and Clean Energy Technology Integration.

- What is the Grid Deployment Office?
 - GDO is responsible for accelerating the deployment efforts to modernize, strengthen, and transform the Nation's electricity infrastructure for all consumers to have access to resilient, secure, and clean sources of electricity. They are working towards maintaining and investing in critical generation facilities to ensure resource adequacy and improving and expanding transmission and distribution systems.
 - www.energy.gov/GDO/grid-deployment-office.gov

Goal: Assist States' System-Wide Planning Efforts for Grid Expansion, Modernization, and the Integration of Clean Grid Technologies

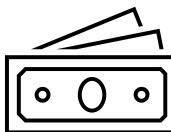


- ✓ DOE will be seeking feedback from participating states on their specific grid-related planning efforts and TA needs, to include both current and future needs.
- ✓ DOE will offer facilitated discussions based on states requests and grid expansion, modernization, and clean energy technology integration requests.
- ✓ DOE will engage and recruit internal and external TA providers to help develop and present relevant tools necessary for states to plan grid expansion and modernization efforts.

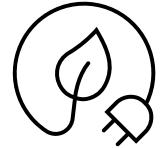
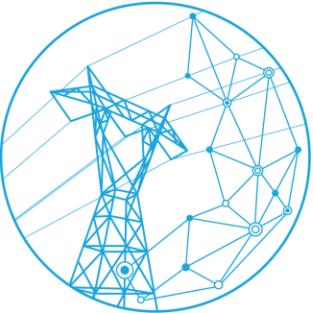
Examples of technical assistance provided by SEP Team may include:



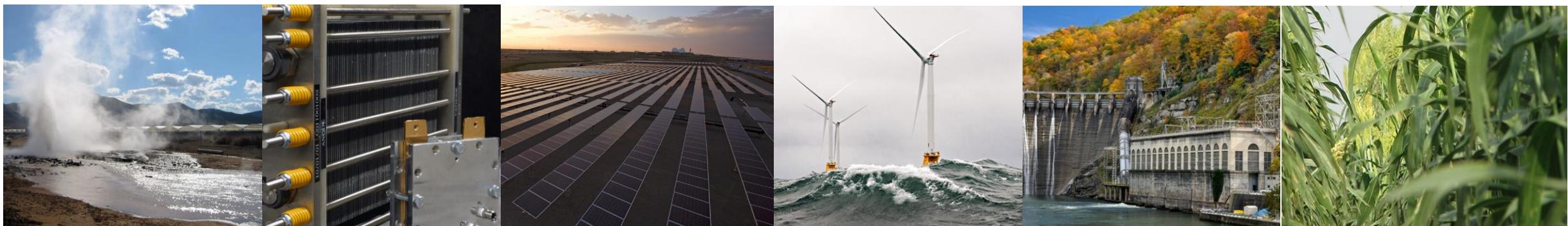
- **Stakeholder Engagement**: Understand regional opportunities to maximize states' grid expansion and modernization efforts.
 - For example: states will engage each other to collectively address needs for system-wide planning.
- **Cost-Savings**: Identify clean grid-technologies not currently in place that support cost-reduction opportunities.



Collaboration opportunities:



- DOE Internal:
 - Grid Deployment Office (GDO)
 - Technical experts
- External:
 - States
 - Subject Matter Experts



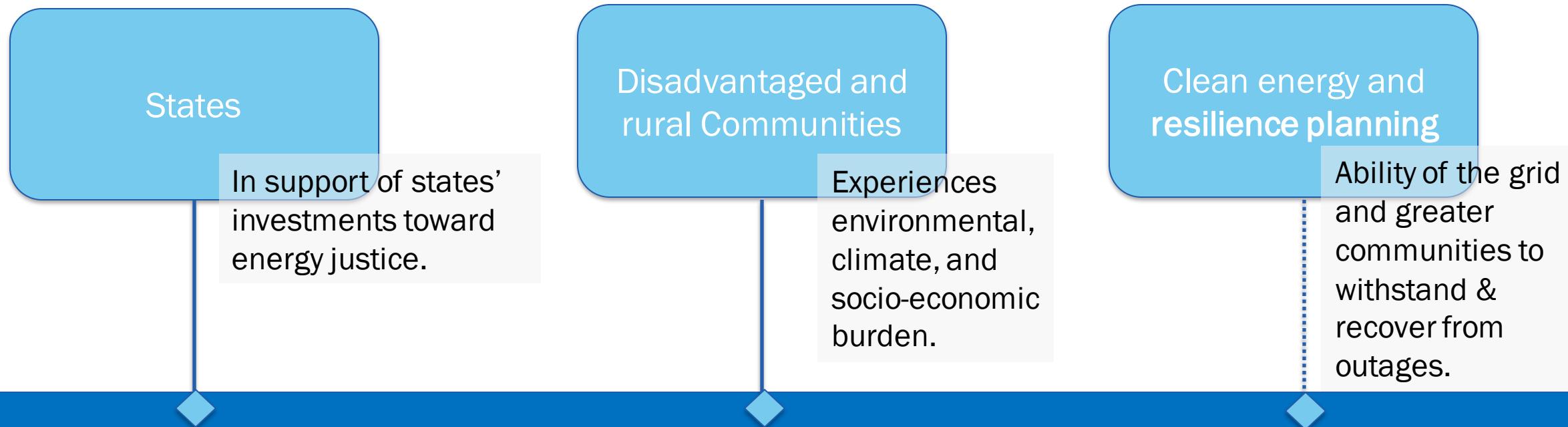
Community Energy Planning



Connecting states, communities, and experts to enhance clean energy and resilience planning, especially in disadvantaged and rural communities.

Community Energy Planning

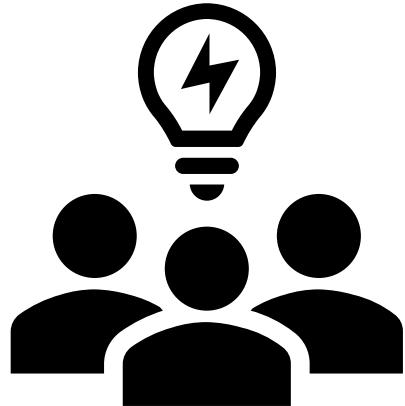
This program is rooted in delivering energy justice benefits as a part of the Justice40 framework, in addition to supporting and maximizing benefits for energy transition communities.



JUSTICE40

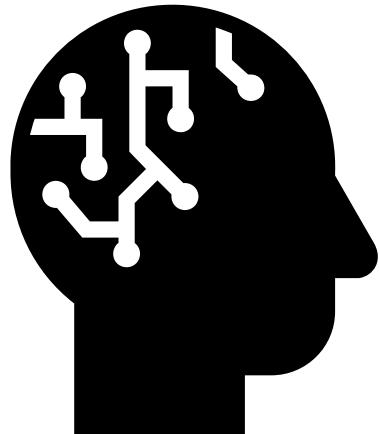
40% of the overall benefits of certain Federal investments to flow to disadvantaged communities.

Collaborative Process and Technical Assistance



- Group work with states to further define the direction and needs of this Transformation Collaborative.
- Sharing best practices

- Consulting or collaborating with experts to support the work (state/local, DOE, NASEO).
- DOE-secured contracts.



- Further engagement with community-based organizations.
- Deepening understanding of what works and does not work when engaging disadvantaged communities.

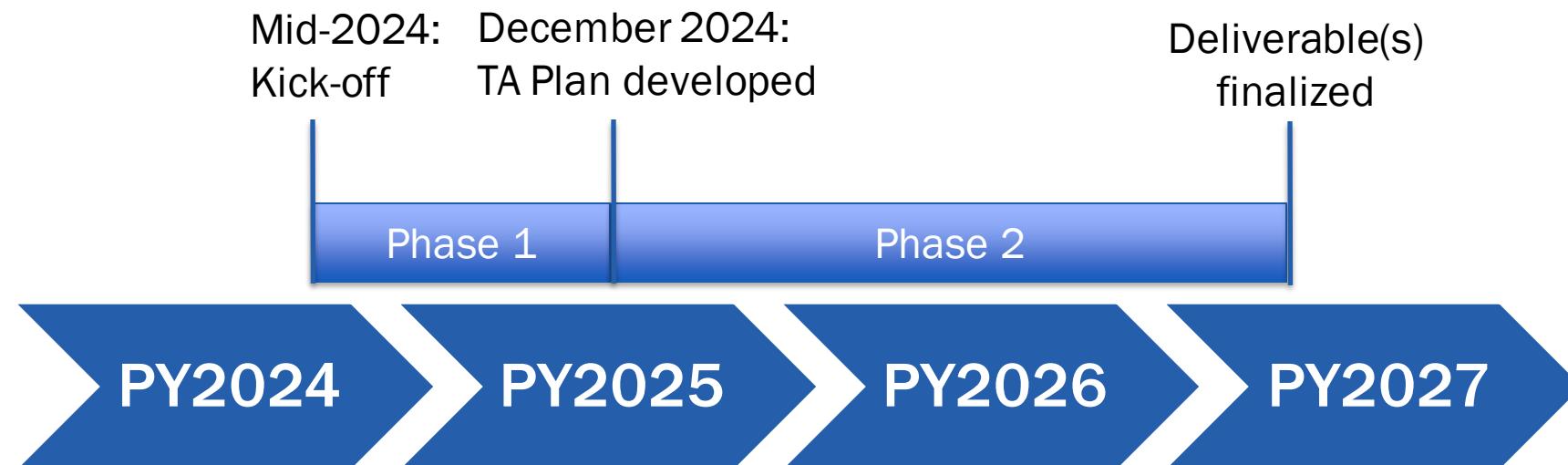
Transformation Collaboratives – Timeline & Next Steps

Changing TC Participation

- Complete/update opt-in form by March 31
- Update PAGE
 - Add/remove/update TC *Activity*
 - Update *Budget* - move funds in/out of *Activity* or *Budget Categories* as necessary
- Formal grant modification

No Changes to TC Participation

- Make sure PAGE is current
 - Refine *Activity* description if necessary
 - Update *Milestones* if necessary



Transformation Collaboratives – SEP Contacts

Energy Planning: Transmission & Distribution

Robyn Reyes-Boyle, SEP Project Officer

Email: Robyn.Reyes-Boyle@hq.doe.gov

Phone No.: 1-240-243-8915

Energy Planning: System-wide Planning for Grid Expansion, Modernization, and Clean Energy Technology Integration

Justin Fisher, SEP Project Officer

Email: Justin.Fisher@hq.doe.gov

Phone No.: 1-240-676-5037

Community Energy Planning

La'Teashia Sykes, SEP Project Officer

Email: Lateashia.Sykes@hq.doe.gov

Phone No.: 1-240-361-8523

Questions and Feedback?

Background

- Federal regulations require DOE to perform formal, on-site monitoring visits to states. During an on-site monitoring visit, the PO reviews the state's performance. A PO may request to observe state personnel monitoring a sub-recipient, or review state procedures for dealing with a problematic sub-recipient.
- Federal regulations also require grantees to monitor each project, program, sub-recipient, function, or activity supported by federal funds to ensure compliance with all federal regulations.

Process

- Pre-Visit Review and Monitoring Instrument
 - At least 45 days prior to the visit, the PO asks the state to complete and provide information.
- Monitoring Visit
 - Monitoring visits typically last from one to three days. They comprise administrative, programmatic, and some financial subject areas.
- Post-Visit Review
 - Within 30 days of the visit, the PO prepares a draft monitoring report containing the results of the on-site visit, including any commendations, concerns, and/or findings. The state is required to address any findings with a Corrective Action Plan submitted to DOE within 30 days
- For more information, review pages 35 – 37 and Appendix F (Monitoring Instrument) of the SEP Operations Manual: <https://www.energy.gov/scep/articles/state-energy-program-operations-manual>

Thank You!



SCEP

STATE & COMMUNITY ENERGY PROGRAMS