SCEP
STATE & COMMUNITY ENERGY PROGRAMS

U.S. DEPARTMENT OF ENERGY

State Energy Program

Bipartisan Infrastructure Law
Technical Assistance Implementation Plan

March 2024

ACKNOWLEDGEMENTS

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Acronym Index

- Bipartisan Infrastructure Law **(BIL)**
- Davis Bacon Act **(DBA)**
- Energy Savings Performance Contract **(ESPC)**
- National Association of State Energy Officials **(NASEO)**
- Office of State and Community Energy Programs **(SCEP)**
- Performance and Accountability for Grants in Energy **(PAGE)**
- Project Officer **(PO)**
- Revolving Loan Fund **(RLF)**
- State Energy Security Plan **(SESP)**
- State Energy Program **(SEP)**
- Subject Matter Expert **(SME)**
- Technical Assistance **(TA)**
- Transformation Collaborative **(TC)**
- Transmission and Distribution **(T&D)**
- U.S Department of Energy **(DOE)**

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EXECUTIVE SUMMARY

The purpose of this document is to summarize the U.S. Department of Energy (DOE) State Energy Program (SEP) Bipartisan Infrastructure Law (BIL) Technical Assistance (TA) stakeholder outreach process, share the feedback gathered through that process, and present implementation strategies and action items. In September 2023, DOE held four days of regional workshops focused on the challenges that states face in implementing SEP BIL-funded projects. DOE gathered and consolidated states' key challenges and needs into three main categories, listed in the graphic to the right.

Key Challenges and Needs for States

1. Limited staff capacity
2. Assistance in meeting reporting requirements and regulations
3. Guidance on braiding/ stacking funding

The SEP BIL TA Implementation Plan is intended to be a living, iterative document that will change with the needs and requests of states over the next 5+ years of BIL implementation. The SEP BIL TA Implementation Plan will be shared with the National Association of State Energy Officials (NASEO) and states for review in January 2023 and feedback in February 2024, with the goal of beginning TA intake in March 2024.

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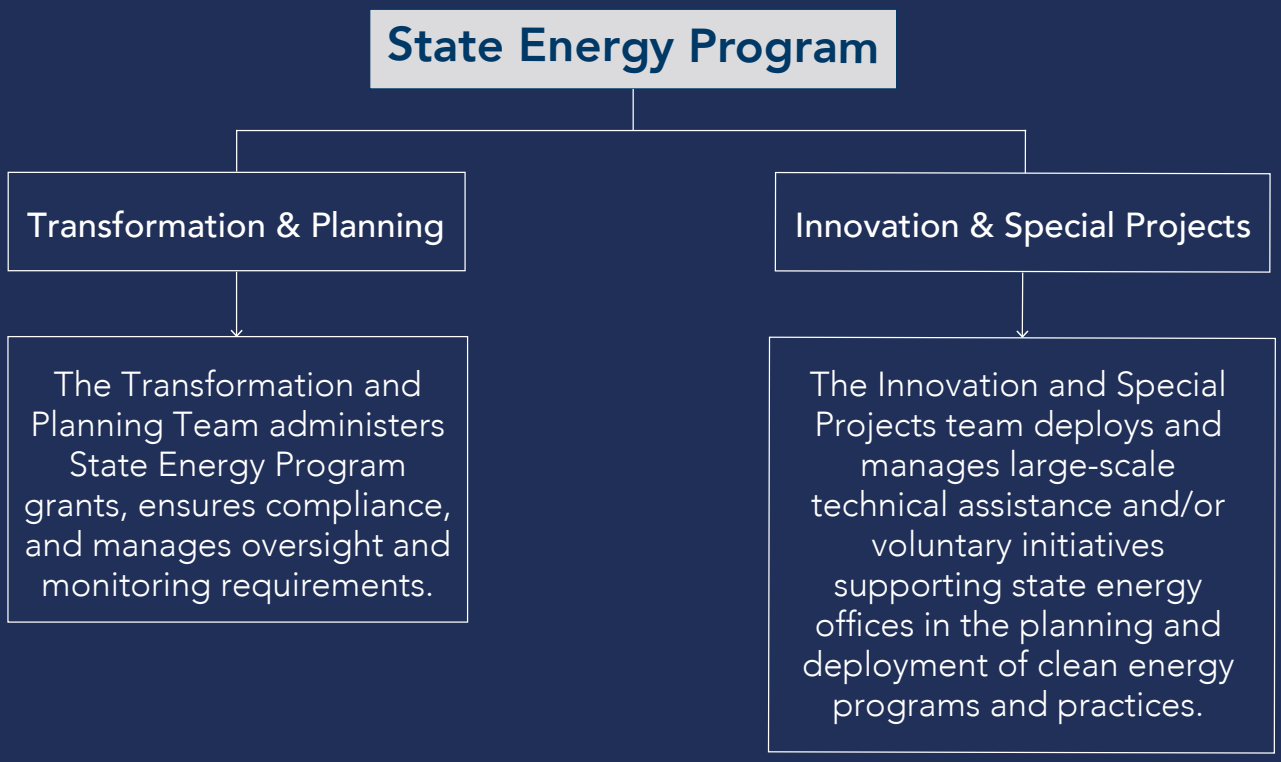
BACKGROUND

The U.S. Department of Energy Office (DOE) of State and Community Energy Programs (SCEP) works with state and local organizations to accelerate the deployment of clean energy technologies, catalyze local economic development, create jobs, reduce energy costs, and avoid pollution through place-based strategies involving a wide range of government, community, business, and other stakeholders. For more than 40 years, DOE's State Energy Program (SEP) has provided funding and TA to states, U.S. territories, and the District of Columbia. States use SEP funds to develop state plans that advance energy solutions through regional networks, strategic energy planning, executive orders, legislation and local ordinances, management of local retrofits, and land-use plans.

SEP provides an avenue for SCEP to work in partnership with state energy officials and policymakers to advance key energy goals by providing annual funding through formula grants while maintaining states' flexibility to pursue activities tailored to their unique resources, delivery capacity, and clean energy goals. SEP emphasizes each state's role as the decision maker and administrator for program activities within their state. Through its collaborative work with states, SEP contributes to the mission of SCEP to support state- and community-led efforts to advance energy efficiency improvements and accelerate renewable energy deployment.



The SEP Innovation and Special Projects team helps states to achieve their clean energy priorities and maximize the impact of federal funding through technical assistance (TA). Historically, SEP TA has included best-in-class DOE resources and subject matter expertise, including tools and guides, planning and modeling/systems analyses, multi-jurisdiction convenings with national and local experts and stakeholders, and other support to help states leverage additional funding streams.

On Nov. 15, 2021, President Biden signed into law the Infrastructure Investment and Jobs Act, also known as the BIL. BIL provides more than $62 billion for DOE to deliver a more equitable clean energy future for the American people by:

- Investing in American manufacturing and workers
- Expanding access to energy efficiency and clean energy for families, communities, and businesses
- Delivering reliable, clean, and affordable power to more Americans
- Building the technologies of tomorrow through clean energy demonstrations.[1]

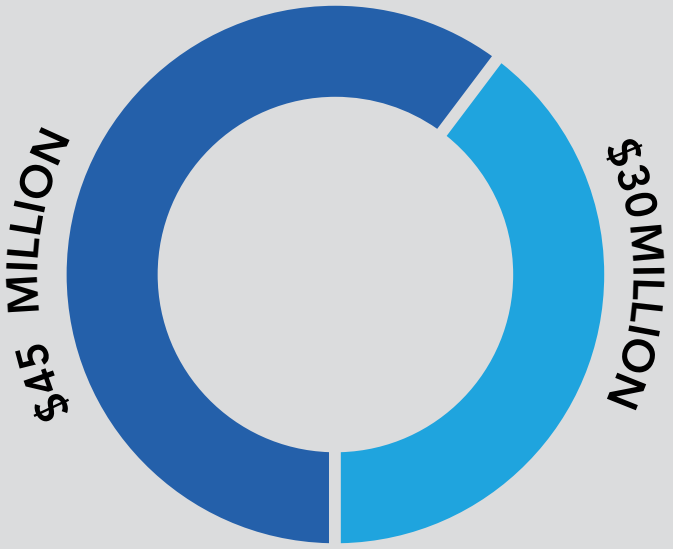
Section 40502 Revolving Loan Fund (RLF) appropriated $250M and Section 40109 of BIL provides $500 million in additional funding to SEP, amends elements included in State Energy Conservation Plans (SESPs), and eliminates cost match requirements. Through the SEP BIL TA Implementation Plan, DOE will continue to provide TA and guidance to states to assist with implementation of efficient and effective programs funded by the November 2021 BIL.

[1] U.S. Department of Energy, Office of State and Community Energy Programs, 2023. "State Energy Program Orientation for New Staff: Module 6 – Bipartisan Infrastructure Law Provisions." https://www.energy.gov/scep/module-6-bipartisan-infrastructure-law-provisions

SEP's TA goals for increasing the impact of BIL-funded work are to:

- Leverage existing resources first; avoid the creation of redundant tools and resources
- Quantify the value added to states and share achievements
- Customize based on state-specific needs and share knowledge
- Retain subject matter experts through bulk procurement while reserving options for state-based TA as appropriate

Congress allocated $500 million to DOE through provision 40109 of BIL for SEP. In Fiscal Year 2022, DOE made $425 million available to states via formula funding. DOE plans to use the remaining $75 million from the provision over the next 5+ years as follows:



- For program direction, oversight, and management, which includes federal staffing to implement the financial assistance program over **5+ years.**
- For use in collaboration with states to design and deliver high-impact TA over **5+ years.**

Within the $30 million:

- Up to **$7 million** will be used for **SESP TA**
- Up to **$4 million** will be used for **RLF TA**
- **$19 million** will be used for **direct TA** to states and other projects

Funding is available until expended. DOE will provide an annual update report on SEP BIL TA projects and associated spending.

OVERVIEW OF TA WORKSHOP SERIES

From September 7–28, 2023, SEP invited all states to participate in a series of virtual stakeholder engagement workshops designed to inform and advise the development of the SEP BIL TA program. Objectives of the workshops were to discuss desired TA activities and format, gain a better understanding of helpful TA deliverables, gather a list of suggested TA providers, subject matter experts (SMEs), partners, and organizers, and to share ideas about future DOE and/or state engagement approaches.

Prior to each workshop, SEP provided attendees with prebrief materials to facilitate conversation and feedback. Throughout the workshop series, attendees had the opportunity to respond to prompts via open discussion and an interactive real-time feedback tool. The key findings gathered throughout 24 regional sessions and four all-hand debriefs are shared in the Summary of Key Challenges and Needs section of this plan. The prebrief materials, slide decks from each debrief, and other ongoing updates can be found on the SEP TA webpage.

Workshops were broken out into the following four TA-related topic areas:

Broad Scope	Including place-based TA, Justice40 initiatives, workforce resources, financing programs, energy planning, energy data, transportation and alternative energy initiatives, and economic development.
Engagement/ Convenings	Including trainings, workshops, gap analyses, strategic planning, cross organizational planning, and engagement.
Specialized Tools and Resources	Including Transformation Collaboratives (TC), RLF, and SESP.
General Discussion and Follow-up	Including discussions on braiding/stacking funding, regulatory compliance, and direct (1-on-1) TA.

Throughout September 2023, SEP also hosted office hours to gather additional feedback not shared during the workshops and to answer questions about SEP. States were also encouraged to share written feedback to the SEP team in response to workshop prompts or other concerns. The responses to these engagements are included in the Summary of Key Challenges and Needs section.

SUMMARY OF KEY CHALLENGES AND NEEDS

After the SEP BIL TA Workshops, DOE gathered and consolidated states' key challenges and needs into several topic areas:

- Research
- Data Access and Analytics
- Staff Capacity
- Reporting Requirements
- Support and Training for Subrecipients
- Braiding/Stacking Funding
- State Energy Security Planning
- Outreach and Engagement with Underserved Communities
- Program Design and Planning

Overall, DOE found that three of these topic areas rose to the top as the most immediate challenges to states, slowing progress on all fronts:

1. Limited staff capacity
2. Assistance in meeting reporting requirements and regulations
3. Guidance on braiding/ stacking funding

Capacity is a major barrier to many states in maximizing their BIL funding. With so many new programs and funding opportunities, states are struggling to complete applications, fulfill reporting requirements, and execute procurement with limited staff.

Compliance and reporting, in relation to federal requirements such as the Build America, Buy America Act, Davis Bacon Act (DBA), and the National Environmental Policy Act, are a central challenge driving states' limited capacity to effectively implement BIL funding and programs.

To address these challenges, states shared that they would benefit most from cohorts of peers to share best practices, case studies, more centralized libraries of TA resources and tools, and opportunities to engage with subject matter experts for direct TA.

States also hope to maximize BIL funding by **braiding and/or stacking** various funding streams. Braiding occurs when multiple funding streams separately and simultaneously provide specific services.

Braiding may require interagency coordination and collaboration. Stacking occurs when multiple funding streams separately and sequentially stack to provide funding for specific services. Barriers to doing so include navigating complex federal requirements and a lack of effective examples. Finally, states would benefit from tailored reporting requirements for specific braided programs, clearer administrative guidance on how to leverage braiding, and examples of how programs can be braided and/or stacked. States repeatedly noted that checklists are especially helpful.

STRATEGY AND IMPLEMENTATION

Introduction

This section of the SEP BIL TA Implementation Plan includes DOE's proposed engagement process to receive and respond to TA requests, proposed solutions to address state challenges, and partners, responsibilities, and information about measuring progress of the SEP BIL TA Implementation Plan and TA solutions.

Proposed Solutions

DOE collected all SEP BIL TA feedback and filtered key challenges and needs into Topics Areas, as listed in the Summary of Key Challenges and Needs. DOE then created strategies with corresponding projects to address the key challenges and needs. High-level strategies include:

Direct TA With Subject Matter Experts

Opportunities to engage and connect with technical experts, including both DOE staff and third-party providers (labs, universities, nonprofit organizations, etc.) supporting states in the collection, analysis, monitoring, and use of data and DOE tools to maximize energy and cost savings.

Educational Repositories and Guidebooks for DOE TA Resources

Easily accessible, organized, and up-to-date repositories of tools, calculators, and TA resources that provide targeted, step-by-step instructions for action and increase accessibility of key resources for states. Existing resources that will be regularly refreshed include the State and Local Solution Center and the State Energy Program page.

Trainings, Workshops, and Other Engagements

Live and on-demand training on energy management and other topics. Workshops and trainings provide opportunities for peer exchange and dialogue with experts. This bucket also includes trainings to support the collection, analysis, monitoring and use of data and DOE tools that maximize energy and cost savings. Office hours and quarterly SEP meetings provide states with opportunities to meet with DOE and other states to discuss pertinent topics, receive training from experts, and learn about programmatic updates and best practices. Office hours and quarterly meetings also provide states with opportunities to share best practices and lessons learned with their peers.

Peer Exchange Opportunities and Cohorts

Established cohorts and convenings of states or other organizations to share best practices and learnings, and collaborate in designing programs, outreach, or applications. May be based on regions, size, shared attributes of programs (such as RLFs) or broadly on topics included in the TCs. Information about TCs can be found on page 23 in the plan.

TA Projects

The tables and descriptions below outlines specific identified strategies and TA projects in response to state challenges:

Direct TA With SMEs

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 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	The Office of Cybersecurity, Energy Security, and Emergency Response 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

Direct 1-on-1 TA

DOE is launching a new 1-on-1 Direct TA program for states in April 2024. This process will include a short TA request form, DOE review, matching with a TA provider, and project tracking. SEP will hold rounds for direct TA requests on a quarterly basis. During this time, states may submit requests for support from a subject matter expert based on topic area and specific need. The topics available for each round will be collaboratively designed with states and DOE. Each state may receive up to 40 hours annually with a third-party provider, with time for scoping the nature of their specific needs. Only states will be able to submit applications for TA through this program, and DOE will provide an intake form for states to submit their request(s).

DOE will work to aggregate requests to reduce duplication when possible. Some additional considerations for screening include whether the TA should be a group engagement, if the request is in scope, and if the applicant has reapplied for a request. DOE will also work to match the state to a TA provider, conduct outreach and clarification to a state, and notify the state on TA status and any modifications to the process.

DOE will review TA requests and assign a third- party provider based on 1) compatibility of skills and bandwidth and 2) in consideration of an applicant's preference. States may work with their Project Officer (PO) to submit direct TA requests and/or submit their own request beginning in Q2 2024. Learn more about the Direct TA process, timeline, and Round 1 topics in Appendix 1.

Clean Energy Innovator Fellowship Program

States can apply to host a Clean Energy Innovator Fellow for up to two years by outlining a specific project scope, identifying a staff member to serve as the fellow's mentor, and participating in the fellow selection process in partnership with DOE. DOE is interested in projects focused on topics including, but not limited to, distributed energy, clean energy development, electrification, and equity and energy justice. When developing projects, Host Institution applicants should note that Fellows are not permitted to support activities related to soliciting financial assistance and funding. Learn more and apply.

Davis Bacon Reporting Platform

DOE is contracting with LCPTracker for a DBA electronic payroll compliance software application, which allows for certified payroll reports and workforce data to be uploaded electronically, 24 hours a day, seven days per week. Recipients of SEP BIL funding (including SEP BIL and BIL RLF) must ensure the timely electronic submission of weekly certified payrolls through this software as part of its compliance with the DBA unless a waiver is granted to a particular contractor or subcontractor because it is unable or limited in its ability to use or access. The validation system checks payrolls for federal Davis-Bacon prevailing wage requirements by flagging mathematical errors or omission discrepancies for the recipient to review on a report. Examples include base hourly rate, total hourly rate, overtime, doubletime, apprentice approval, and fringe benefit contributions. Additionally, the system utilizes industry standard eSignature technology, thus allowing recipients to electronically sign payroll reports versus using a wet signature. This online platform, which is live as of March 2024, streamlines DBA reporting requirements and compliance. All states have access to this cloud-based platform, on-demand trainings, and weekly virtual trainings. For more information visit the Davis-Bacon Act Requirements for Recipients of BIL Funding website.

State Energy Security Plan TA

The Office of Cybersecurity, Energy Security, and Emergency Response has developed resources that states can incorporate into their SESPs or use as references. These optional resources are intended to assist states in the development, implementation, and revision of plans in FY24 and beyond. This TA includes, but is not limited to, convening state cohorts arranged around elements, supporting capacity building and peer exchange, direct assistance via office hours, and providing guides, toolkits, and templates. The DOE point of contact for SESP TA is Megan Levy at megan.levy@hq.doe.gov.

Educational Repositories and Guidebooks for DOE TA Resources

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

State and Local Solution Center

The State and Local Solution Center is a resource hub for states, local governments, and K-12 school districts. In addition, the Solution Center highlights various TA and funding opportunities to help your state reach its energy efficiency and renewable energy goals. The State and Local Solution Center also features a regularly updated Public Sector Funding & Technical Assistance Programs page that highlights and directs users to currently available opportunities. Explore this hub to learn more about upcoming events or sign up to receive the Spotlight Newsletter for monthly updates on public-sector happenings. DOE is working to refresh the Center to better meet users' needs, add new material, and organize resources and webinar recordings to be more navigable.

- Updated and new topics will include: RLF, research, program design, federal regulatory compliance, SEP grant report and subrecipient support, outreach and engagement with underserved communities, and stacking and/or braiding federal funding
- New resources may include checklists, updated DOE guidance, and toolkits
- The RLF Resource Library is an example of new, topical repositories of resources that will be continually developed and updated.

SEP TA Webpage

The SEP TA Webpage includes updated information about TA available to states through SEP. New resources may include checklists, information about TA intake, an office hours and quarterly roundup schedule, and 2023 workshop materials.

RLF Resource Library

The RLF Resource Library includes case studies and sample documentation with real-world examples and tools to inform the development of RLF programs. Resources will be continually added to this library. This Resource Library is designed for states deploying RLF programs under the BIL (BIL 40502) Energy Efficiency Revolving Loan Fund Capitalization Grant Program and may also be a valuable resource for local governments and others designing and managing RLF programs.

State Energy Program Guidance

This webpage provides a list of current and previous SEP guidance documents. Updated resources may include guidance on stacking funding, reporting, and compliance. The SEP Operations Manual and BIL funding guidance are also linked on this page.

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 Q2 2024

Trainings and Webinars

This solution includes updated training pages, which could include a combination of live instructor led courses, online courses, and online virtual learning videos. Specific updated topics could include federal regulatory compliance, SEP grant reporting and subrecipient support, and RLF. This resource could include case studies and best practices.

SEP Quarterly Roundups

These meetings will be hosted quarterly (March, June, September, and December) on the second Thursday of each month. SEP will share information on hot topics and reminders for upcoming events. This will be followed by a presentation from a subject matter expert on a topic and/or a state sharing best practices. Topics will be administrative, regulatory in nature, and in response to state feedback.

SEP Office Hours

The first hour of each session will focus on a specific technical topic, based on what needs states have expressed during past and ongoing engagement. A SME will deliver a brief presentation on the day's topic and answer questions. The second half of each session will be open to states to ask any other questions or provide general feedback to SEP staff.

SEP Bulletin

The SEP Bulletin will be hosted on the SEP website and delivered via email to subscribers. The SEP Bulletin will include general updates on TA requests and TA provided, SEP announcements and initiatives, and reminders on upcoming deadlines for applications and reporting requirements.

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

Transformation Collaboratives

TC activities will begin in Q3 of 2024 and will focus on three topics: Transmission and Distribution (T&D) Planning, System-wide Planning for Grid Expansion, and Community Energy Planning. States that are interested in signing up for a TC in this round but did not opt in during the application period may do so by updating their application by March 31, 2024. TCs will launch in summer of 2024. Topics and timing of subsequent rounds of TCs will depend on states' needs and interests. TCs will offer TA. Specific activities include, but are not limited to, the following:

- Participating in peer exchanges to replicate successful approaches and share outcomes
- Advancing deployment timelines by addressing collective technical needs through tool trainings, technical analyses, and modeling
- Collaborating on implementation priorities via convenings run by a third-party provider and including best-in-class subject matter experts. These may include consultants, universities, NGOs, one or more DOE National Labs, and other entities.

Continue reading for TC descriptions by topic.

Energy Planning: (T&D) Planning

Section 40109 of BIL added a new mandatory SEP requirement for T&D planning. This TC will help states enhance their T&D planning efforts. States will have the opportunity to participate in facilitated regional engagements to coordinate both state-specific and regional perspectives in their T&D planning. For example, engagement could include state and local planning to accommodate increased electricity loads from electric vehicle expansion; identification of best practices to ensure affected stakeholders are engaged in efforts to integrate clean energy technologies; TA exploring how to better incorporate equity into the T&D planning process; or TA in designing grid modernization strategies to enable effective integration and utilization of distributed energy resources for maximum economic impact, resilience, and other benefits.

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

In an era of rapidly changing energy technologies and costs, deciding how to best invest significant resources in the electricity system requires a strong system planning approach, using up-to-date cost forecasting and best practices for modeling, and analyzing the role newer technologies can play on the grid in order to maximize cost savings for ratepayers while maximizing resilience and other needs and benefits. States will engage with each other to collectively address needs for system-wide planning for grid expansion, modernization, and the integration of clean grid technologies that support cost-reduction opportunities, resilience, and clean energy technology markets. For example, TA may focus on state development or use of grid assessment tools or direct expert assistance from subject matter experts.

Community Energy Planning

States and communities will connect with experts and with each other, including in cohorts created on a regional or other basis, to enhance clean energy and resilience planning, especially in disadvantaged and rural communities. This program will include a particular emphasis on delivering energy justice benefits as part of the Justice40 framework, as well as on supporting and maximizing benefits for energy transition communities. TA may include, for example, data collection in disadvantaged communities, or engagement with local governments and community-based organizations to map resilience and equity needs and plan projects that address them.

Cohorts and Campaigns

Cohorts and campaigns may be led by DOE or third-party organizations in partnership with DOE. Cohorts bring together states with similar energy goals, opportunities, or challenges to:

- Learn from SMEs, who will provide education, best practices, analysis tools, templates, and other resources as needed
- Exchange case studies, experiences, and insights with other states that can inform their own activities
- Gain insights that can help them access upcoming funding or programmatic opportunities
- Develop proposals, action plans, and strategies to overcome common challenges and enable accelerated progress.

Cohorts will be time-bound (usually between six months and two years) and are generally informal in their organization. States voluntarily participate and share their goals, availability, and preferred cohort duration through a needs assessment to be administered by DOE. States that are interested in forming a cohort focused on a specific topic or project should notify their PO.

Campaigns are time-bounded voluntary initiatives, but unlike cohorts, they are generally more formal. Participants make a good-faith-effort commitment to participate and take specific actions (e.g., via a partnership agreement).

Campaign participants can access expert-led trainings, customized TA, and peer exchange opportunities. They can also receive DOE recognition for their contributions to developing strategies and best practices on a challenging issue.

Partners and Responsibilities

This section of the SEP BIL TA Implementation Plan outlines the partners and responsibilities for implementing proposed projects. Partners in the SEP BIL TA Implementation Plan include DOE SEP, states, third-party TA partners, and other DOE offices and federal agencies. DOE SEP will serve as the hub for connecting states to BIL SEP TA resources.

SEP POs are responsible for maintaining partnerships with states that result in a deep understanding of project performance and elevate TA requests to the DOE SEP TA team. States are responsible for providing their PO with TA requests and for reporting on outcomes and metrics, included those related to TA received. After discussion with their PO, states may submit their written TA requests directly to their PO or submit their requests online.

DOE will work with TA providers and partners in response to state requests to deliver results that are timely, accurate, and directly meet the needs of states. TA partners may include DOE National Laboratories (National Renewable Energy Laboratory, Lawrence Berkeley National Laboratory, Pacific Northwest National Laboratory, etc.), associations (NASEO), and other contracted providers. SEP will also work with other offices within DOE and other federal agencies to address state requests. State partnership, communication, and input in the SEP BIL TA Implementation Plan is critical for successful implementation of BIL.

Measuring Progress and Impact

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.

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 to share lessons learned and best practices with other states via peer exchange, webinars, cohorts, and other informative forums.

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. 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.

Next Steps

Direct TA request intake will begin in April 2024. Learn more about the Direct TA program, including the process for requesting and receiving TA and the topics covered in the first round, in Appendix 1 and on SEP's TA webpage. States should expect to receive updated information on the TA intake form, the process for requesting 1-on-1 TA, and information about new TA projects via email and/or your SEP PO.

We strongly encourage you to provide written feedback on this implementation plan and other TA needs to the National Association of State Energy Officials (NASEO), your SEP PO, Erin Taylor (erin.taylor@hq.doe.gov), Monica Andrews (monica.andrews@hq.doe.gov), and/or StateEnergyProgram@hq.doe.gov.

TA Engagement Process

Strategies and projects in the SEP BIL TA Implementation Plan will be executed based on state need and priority. SEP staff, alongside DOE partners, will lead and serve as the main contact for initiatives based on expertise and capacity. Specific solutions and projects will be executed on schedules that are outlined in the Proposed Solutions section of this plan.

During Quarterly Roundups and Office Hours, DOE will engage with states to gather feedback on existing, ongoing, and planned TA solutions and topics. As always, states can and should reach out to their POs as the first in line from DOE to respond to questions and concerns. POs will work to leverage existing resources first and will elevate TA requests as necessary.

Appendix 1

U.S. Department of Energy
State Energy Program
Bipartisan Infrastructure Law
2024 Direct Technical Assistance Topics

In support of states, the following topic areas are outlined to provide guidance and examples of technical assistance (TA) support that may be provided through the State Energy Program (SEP) Bipartisan Infrastructure Law (BIL) TA Program. Any estimates of hours and timelines are intended only to provide guidance for states to submit their requests. Specific details will be determined during the scoping process as available data is shared and the scope of the project determined.

1. Strategic Energy Planning

Strategic energy planning is a crucial early step in informing the direction of state goals related to clean energy and associated funding priorities, defining community priorities, clean energy goals, and a roadmap for potential near-term and long-term energy projects.

An example task within this topic may be to create an initial roadmap and will require all of the committed 40 hours TA. Third-party providers can help to take the first steps in the strategic energy planning process, including:

- Providing background research and planning efforts to set a baseline.
- Identifying initial goals and potential next steps to developing a comprehensive plan to achieve them.
- Facilitating a workshop or providing supplementary resources that will aid in planning.
- Pinpointing other technical analysis or data collection that will need to happen at the community- or state-level to achieve these goals.

The depth of the planning process and specificity of the resources will be determined based on planning already performed by the state, availability and specificity of relevant supporting data, and engagement from associated stakeholders. Best practices are also available for review.

2. Transmission and Distribution Planning

Section 40109 of the BIL added a seventh mandatory measure – transmission and distribution (T&D) planning to SEP. States must complete a T&D plan that meets the mandatory conduct of activities to support T&D planning, as stated by the SEP regulations (as described in C.F.R. Part 420.15 minimum criteria for required program activities for plans) including:

- Support for local governments and Indian Tribes.
- Feasibility studies for transmission line routes and alternatives.
- Preparation of necessary project design and permits.
- Outreach to affected stakeholders.

For clean energy goals to be successful, it is important to understand the regulatory requirements for future T&D planning. While these efforts are typically led by utilities, cooperatives, or regulators, support in this topic area could include state engagement in guiding or facilitating this planning process or collecting relevant data to inform state priorities. Assistance for a task within this topic could focus on:

- Incorporating state-level goals into planning scenarios developed by utilities, cooperatives, or regulators.
- Evaluation of capacity building that would be required to meet identified goals.
- Regional stakeholder identification and informing stakeholder engagement practices.

- Research on regulatory requirements from the regional transmission operator, independent system operator, or other regulating body (e.g., NERC, FERC) that will impact planning effort.
- Creating and evaluating requests for information and/or requests for proposals.
- High-level transmission or distribution asset capital planning.
- High-level integrated resource planning or integration with distributed energy resource-uptake forecasting.

The level of depth for this example task and the number of hours it will require will depend on the stage of planning already completed, the specificity of the data available, and the ability to narrow to a particular region or geography within the state. States may elect to use as few as 10 hours on this task, or up to 40, depending on the depth of the question the data and information available to do the necessary analysis.

3. Project and Program Financing

In support of state-led energy goals, third-party providers can support financing goal setting, strategy development, and best practices for project financing and establishment of financing programs. Assistance under this task could be in support of a state as the applicant or as the funder and include benefits and considerations in owning clean energy assets, market education on financing projects, and typical pricing and expectations.

At an individual project level or program strategy level, a task in this topic area can more specifically support:

- The identification of relevant funding opportunities.
- Strategies for financing energy efficiency improvements that are not fully covered by existing funding sources.
- The development or calculation of common internal metrics for energy projects, including net present value, internal rate of return, return on investment, and how to incorporate these calculations into funding applications.
- The development or calculation of financing program performance metrics, including leveraging ratios and defaults.

Recent supporting materials available for reference include the Blueprint 5 for Unlocking Sustainable Financing Solutions for Energy Projects and Programs with Revolving Loan Funds and the BIL 40502 Revolving Loan Fund Technical Assistance Resource Library. State Energy Offices may elect to use as few as 10 hours on this task, or up to 40, depending on the depth of the question the data and information available to do the necessary analysis.

4. Modeling and Analytics

A number of modeling and analysis tools are available to support states. The specific tool, or combination of tools, to be used will be determined during the scoping process, but the following outlines some high-level capabilities, anticipated outputs, and examples of questions that can be answered by each of the tools. More specificity and available data around the evaluation a state would like to do will result in higher quality outputs.

Low-Income Energy Affordability Data (LEAD)

LEAD can provide data, such as energy burden, to help inform data-driven decisions, especially in pursuit of Justice40 Initiative goals. Data available includes historical information from the U.S. Census Bureau to identify geographic representation of energy burden and costs, a comparison of geographies within a state, and inequities across regions. This tool is intended as a starting point to find areas with higher energy burdens and costs to inform decisions about funding distribution and program qualifications. Analysis with this tool will likely require 10 or fewer hours of the available technical assistance.

State and Local Planning for Energy (SLOPE)

SLOPE is an online platform to support data-driven state and local energy and decarbonization planning. SLOPE includes two distinct tools to support jurisdictions' planning needs: the Scenario Planner to compare scenarios for the future of energy costs and emissions for counties and states, and the Data Viewer to explore city, county, and state data on renewables, efficiency, and transportation. SLOPE can help states determine areas with the greatest potential, opportunity, and need for energy investments, and inform associated priorities and decision-making. Analysis with this tool is often informed by outcomes from the LEAD tool, although this is not required. This analysis will likely require 10-20 hours of the available technical assistance.

Renewable Energy Integration and Optimization (REopt)

REopt and accompanying analysis optimize planning of generation, storage, and controllable loads to maximize the value of integrated distributed energy systems for buildings, campuses, and microgrids. REopt recommends an optimally sized mix of renewable and distributed energy, conventional generation, and energy storage technologies; provides a dispatch strategy for operating the technology mix at maximum economic efficiency; and estimates the net present value of implementing those technologies. Significant up-front data is essential for this analysis and will likely require the full 40 hours of technical assistance.

System Advisor Model (SAM)

SAM calculates the techno-economic analysis of energy technologies. It is used by project managers and engineers, policy analysts, technology developers, and researchers to investigate questions about the technical, economic, and financial feasibility of renewable energy projects. Financial models calculated within SAM may include:

- Residential and commercial projects where the renewable energy system is on the customer side of the electric utility meter (behind the meter), and power from the system is used to reduce the customer's electricity bill.
- Power purchase agreement (PPA) projects where the system is connected to the grid at an interconnection point, and the project earns revenue through power sales. The project may be owned and operated by a single owner or by a partnership involving a flip or leaseback arrangement.
- Third party ownership where the system is installed on the customer's (host) property and owned by a separate entity (developer), and the host is compensated for power generated by the system through either a PPA or lease agreement.

Significant up-front data is essential for this analysis and will likely require the full 40 hours of technical assistance.

PVWatts

The PVWatts Calculator estimates the energy production of grid-connected photovoltaic (PV) energy systems throughout the world. It allows homeowners, small building owners, installers, and manufacturers to easily develop estimates of the performance of potential PV installations. Analysis with this tool will likely require 10 or fewer hours of the available technical assistance.

Jobs and Economic Development Impact (JEDI)

The JEDI model was developed to estimate job potential from the perspective of a particular clean energy technology within a community. Outputs from this model could include the jobs that could be supported from a specific project installation and occupational estimates to prepare a community for forthcoming needs or implement Justice40 Initiative goals. Quality of the outputs will depend on the specificity of the project and availability of relevant data. States may elect to use as few as 10 hours on this task, or up to 40, depending on the depth of the question the data and information available to do the necessary analysis.

Climate Risk and Resilience Portal (ClimRR)

ClimRR provides future climate data to help plan for and adapt to our changing world. Using one of the world's largest supercomputers, ClimRR models over 60 climate variables to provide the most sophisticated, free dynamically downscaled projections for the United States. The tool is designed to empower individuals, governments, and organizations to examine simulated future climate conditions at mid- and end-of-0century for a range of climate perils.

Environment for the Analysis of Geo-Located Energy Information (EAGLE-I)

Restoring power after an outage event is a critical piece of response and recovery. EAGLE-I is an interactive geographic information system (GIS) that allows users to view and map the nation's energy infrastructure and obtain near real-time informational updates concerning the electric, petroleum, and natural gas sectors. The tool provides operational and scalable data and information for real-time wide-area situational awareness, providing a centralized platform for monitoring power distribution outage for over 146 million customers, which is just over 92% coverage of the United States and territories.

To request Round 1 direct technical assistance, visit:
energy.gov/scep/request-direct-technical-assistance

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