***Information about the Technology Action Group (TAG) Model and How to Participate***

***What is a TAG?***

A TAG represents a voluntary opportunity to participate in a learning and best practices model between the State Energy Program (SEP) and the 56 State Energy Offices (SEOs) of the states, territories and the District of Columbia (hereinafter “states”)[[1]](#footnote-1). TAGs are voluntary and established as a pilot initiative for PY21 through PY22. Through participation in a TAG, states will have the opportunity to:

* + Coordinate efforts on the TAG topic of their choice; and
	+ Receive technical assistance from SEP (through a national laboratory or other provider) on the topic, thus increasing the impact of states’ formula work.

Through discussions with states, SEP has identified three topics to which states may dedicate a portion of their SEP formula funds (which would include covering related state staff salaries, benefits, indirect costs, and travel) in order to participate in a TAG. The three topics are:

1. Managing peak demand with energy storage

States collaborate on studies or projects to determine the level of energy storage necessary to reduce the amount of additional energy reserve input needed during peak demand.

1. Onsite energy systems at critical facilities

States work together to develop plans for onsite energy systems that can power critical facilities during grid outages and normal operation using lab-designed tools.

1. Main Street revitalization

States work together to identify successful strategies for targeting Main Street communities and small businesses to stimulate local energy efficiency projects performed by local professionals that reduce energy bills.

***What are Benefits to Participating in a TAG?***

By participating, states will receive:

* Technical and programmatic assistance from SEP, national laboratories, EERE Technology Offices and other providers, as appropriate;
* Opportunities for information sharing and collaboration among four to nine other states with similar goals;
* Collective partnership, information, and collaboration among states and with US DOE;
* An opportunity to build upon the SEP Market Title Project to better describe the achievements in key areas by individual states and territories;
* A collective set of success stories developed based on the TAG results; and
* An opportunity to assist U.S. DOE and states in communicating the value of SEP and the states in advancing priority areas.

***How Does a State Participate?***

In order to participate, a state must do the following:

1. Pick **ONE** of the three TAG topics. States may only participate in one TAG though they may choose to be observers[[2]](#footnote-2) in a TAG of their choice.
2. Dedicate a portion of a state’s formula funds[[3]](#footnote-3) to the TAG topic in PY21. The minimum funding requirement is:
	1. 1% of the state’s formula funding allocation; or
	2. $10,000, whichever is greater.
3. Make a commitment to the following for the two-year duration of the TAG:
	1. Participate in development and execution of the TAG;
	2. Actively participate in TAG discussions;
	3. Track and report staff time spent on the TAG to accurately quantify SEP formula investment in a TAG topic;
	4. Track and report progress towards TAG goals – e.g. milestones, metrics; and
	5. Share lessons learned.
4. Complete the state commitment letter agreeing to the above items (see last page).

***How Will SEP Form TAGs?***

* SEP will review states’ TAG topic selections to identify groups of states interested in each topic.
* SEP will organize TAGs of no less than five and no more than 10 states.
* If more than 10 states are interested, the states will be divided into different subgroups so that there is a manageable number of states per group or subgroup.

***What Will SEP Provide to States?***

SEP will provide technical assistance (through a national lab, technology office, or other provider as appropriate) related to these topics. SEP will also organize and manage the TAG calls, webinars, and aggregated reporting. SEP will provide opportunities for states to interact and consult with subject matter experts.

***What Does SEP Hope to Accomplish with the TAGs?***

SEP’s goals for the TAGs are to demonstrate tangible progress towards metrics and goals related to the subject matter of the TAG and to communicate the value of SEP formula dollar funds invested in the TAG topics.

 ***Metrics and Goals for the TAG***

In each TAG, SEP and the participating states will jointly identify metrics and goals for each TAG that would be achievable in two (2) years. States and SEP will also jointly identify state-based goals and metrics. SEP and states will work collaboratively on rolling up the two-year, achievable goals into aggregated metrics for each TAG.

 ***Communicating Successes***

Because SEP formula funds will be dedicated to a discrete topic of interest, SEP will track/aggregate the amount of funding/time devoted to a topic in the SEP annual plan, as well as leveraged and actual funds expended over the two-year period. SEP and TAG members will work together to develop success stories and to report progress at NASEO regional and annual meetings, as appropriate. TAGs will hold occasional report outs on their work to benefit other states that may be interested in the topic but are not part of the TAG. Report outs will also provide opportunities for states not in TAG to provide their perspective and feedback.

***How Will States Report in PAGE on TAG Work?***

States will choose “TAG” under the Activity name in their PAGE Annual File, and use as the SEO External Name “TAG 1,” “TAG 2,” or “TAG 3,” followed by a name of the state’s choice, e.g. TAG 1 – Energy Storage Peak Demand Study. The inclusion of “TAG 1,” “TAG 2” or “TAG 3” in the SEO External Name will facilitate SEP’s rolling up of information by TAG.

***What is the Expected Time Commitment by a State for Participation in a TAG?***

The time commitment may vary depending on the interest of the state and workload of the TAG but a state can expect at least the following:

* Monthly group calls of 1 hour.
* Calls with the Project Officer running the TAG, which could be monthly for 30 min- 1 hour.
* Time for individual work that could include call preparation, working with a DOE technical assistance provider, and reporting out on TAG (not required by DOE but by a state to their management).
* Time for quarterly data collection within or outside of PAGE. The TAG may select metrics that are not currently in the SEP Process Metric List. Data on those metrics will be collected by the Project Officer leading the TAG through the avenue decided upon by the TAG.
* Travel to a collaborative in-person TAG meeting, conditions permitting.

***Since the TAGs last two years, will SEP require formula dollar investments in each year? Does it need to be more than just staff time?***

* The state will have to commit staff time for both years to participate in TAG.
* The state investment of formula funds in the TAG topic in the first year (PY21) must go beyond staff time related to participation in a TAG. The state investment could consist of staff time related to participating in a TAG *and* staff time spent on a TAG-related topic in the state’s plan, or staff time related to participating in a TAG *and* funding to for a TAG topic-related project.
* States are required to make an investment of formula funds beyond staff time for participation in the TAG only in PY 21. SEP encourages investment of formula funds in a TAG-related activity in PY22, but it is not required.

***What is the timeline for this initiative*?**

SEP will work on organizing TAGs once PY21 applications are received (April-May 2021), and may began reaching out to states at that time. TAGs will begin work once all awards are made (anticipated no later than October 1, 2021).

If you are interested in participating in a TAG, please complete and return the TAG Commitment Letter to your SEP Project Officer.

1. Per 10 CFR 420.2, “State” means a State, the District of Columbia, Puerto Rico, or any territory or possession of the United States. [↑](#footnote-ref-1)
2. A TAG observer will be invited to listen to TAG report-outs on a quarterly basis, but will not have a role in making decisions for the TAG. Observers are not required to dedicate formula funds to a TAG topic. [↑](#footnote-ref-2)
3. Note that dedication of SEP formula funds to a TAG topic means that a state would dedicate a portion of its SEP formula funds to development or execution of a project related to the TAG topic. It does not mean that the funds would be transferred to DOE, unless a state chooses to contract with a DOE lab; for example, for work related to the TAG topic. The financial commitment can be in the form of staff time, contracts, or other relevant SEP funding categories. [↑](#footnote-ref-3)