

## **Onsite Energy Technical Assistance Partnerships Informational Webinar- 20230222 1801-1 – Text Version**

*Here is the text version of the webinar Onsite Energy Technical Assistance Partnerships Informational Webinar - 20230222 1801-1, presented by the U.S. Department of Energy's Industrial Efficiency & Decarbonization Office.*

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*Meegan Kelly:*

*Cover slide of presentation:*

Alright. Thanks, Jamie. Thanks, Matt. Hello, everyone. Welcome and thank-you for your interest in the U.S. Department of Energy's informational webinar about the Onsite Energy Technical Assistance Partnerships Funding Opportunity Announcement (also known as "FOA"). My name is Meegan Kelly. I'm a technology manager with the Industrial Efficiency and Decarbonization Office. I am joined by my colleagues Anne Hampson and Jamey Evans, who will be speaking later in today's webinar. Before we begin, I'd like to draw your attention to the email address on this cover page. This is the official mailbox to direct your questions during the FOA process.

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This webinar is being recorded and will be published on the EERE eXCHANGE website. Please note that video and speaking capability has been disabled for attendees. However, we are required to share the following message for all recorded webinars: If you do not wish to have your voice recorded, please do not speak during the call. If you do not wish to have your image recorded, please turn off your camera or participate by phone. If you speak during the call or use a video connection, you are presumed consent to recording and use of your voice or image.

If you have any questions during the webinar, you can either email the onsiteenergy mailbox – OR -- you can type in your questions in the Q&A feature in the Webex. You can find the Q&A feature in the bottom right hand of your Webex screen. Click the three dots and select "Q&A." Note that the Q&A feature is different from the chat. When you submit questions for Q&A, please be careful not to submit any language that might be business sensitive, proprietary or confidential. All questions and answers will be posted to the Q&A spreadsheet on EERE eXCHANGE. Questions will not be answered live during the webinar. A copy of today's slides will be posted on EERE eXCHANGE within two to three days of this webinar.

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Please note - No new information other than what is provided will be discussed today, so there are no advantages or disadvantages to the evaluation process with respect to participation in today's webinar. Your participation is voluntary. You are encouraged to carefully read the FOA. This presentation summarizes its contents. If there are any inconsistencies between the FOA and today's presentation, the FOA is the controlling document and applicants can seek clarification by submitting a question. At this time, I'd like to invite Anne Hampson, program manager for technical assistance and workforce development -- to introduce the Industrial Efficiency and Decarbonization office and the goals and objectives of the FOA.

*Anne Hampson:*

*Next slide:*

Great. Thank-you, Meegan. This FOA is being issued by the Industrial Efficiency and Decarbonization Office (also known as IEDO). That's how we decided to say that acronym. IEDO accelerates the innovation and adoption of cost-effective technologies to achieve an efficient and competitive industrial sector with net-zero greenhouse gas emissions by 2050. So in order to do that, we provide funding, management, and strategic direction necessary for a balanced national program of research, development, demonstration, technical assistance, and workforce development to drive improvements in energy, materials, and production efficiency, *and* decarbonization across the industrial sector. IEDO has three focus areas. The first two – the “energy-and emissions-intensive industries” and “cross-sector technologies” are R&D programs. And then the third IEDO focus area is technical assistance and workforce development. That's the area I work on. This funding opportunity falls within the technical assistance. This program is where we work directly with manufacturers and other large energy users to increase the adoption of energy efficiency, decarbonization, energy management programs, and water and wastewater reduction technologies and practices.

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The technical assistance activities to be funded under this FOA will support DOE's industrial decarbonization strategy by establishing a regional network of Technical Assistance Partnerships (also referred to as TAPs) to help industrial facilities and other large energy users increase the adoption of onsite energy technologies. For the purpose of this FOA, when we refer to “onsite energy” that refers to electric and thermal energy generation and storage technologies that are physically located at an end-user site and provide clean energy services directly to the end-user. Clean onsite energy generation and storage technologies provide a practical alternative to conventional fossil-fuel systems and grid electricity for facilities to directly produce flexible, reliable, and affordable heat and electricity and also reduce their emissions.

Onsite energy encompasses a broad range of technologies that are suitable for deployment at typical industrial facility sites, generally at a scale between 50 kW on the low side and 50 MW. And these technologies include battery storage, combined heat and power, district energy, fuel cells, geothermal, industrial heat pumps, renewable fuels, solar photovoltaics, solar thermal, thermal storage, wind power, and even others we might not even know about. For over 20 years, DOE has supported a subset of these technologies through a regional network known as the CHP TAPs, and based on that successful program model, IEDO is initiating this broader Onsite Energy TAP program with the goal of providing similar services for a broader set of technologies.

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Also for this FOA, we wanted to let you know that “technical assistance” refers to the broad range of services in support of onsite energy project deployment from the very beginning of the implementation process – such as pre-installation technology screenings – all the way to the end -- such as providing post-installation operation and maintenance support. The Onsite Energy TAPs will also engage with policymakers, utilities, and other key stakeholders to accelerate pathways for integration of onsite energy technologies. So additional activities would include developing public tools and resources, sharing best practices, and building partnerships that drive decarbonization across the U.S. industrial sector. So at this time, I'll pass it back to Meegan.

*Meegan Kelly:*

*Next slide:*

Thanks, Anne. Alright. The agenda for today is listed here. Please note, we won't go through every section of the FOA in this webinar, but we will highlight key sections. So we encourage you to have a copy of the FOA in front of you for reference as we go through the presentation.

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This slide shows the anticipated schedule. The FOA has already been posted, and we are conducting the informational webinar now. I'll highlight two key dates. First, applicants are encouraged to submit an optional letter of intent by next Tuesday, February 28, 2023. Letters of intent are not required. Second, the deadline for full applications is April 21, 2023, at 5 p.m. Eastern. We will cover more of the requirements for the full application submission in the upcoming slides.

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Throughout the webinar today, we will refer to the EERE eXCHANGE website. This slide includes a screenshot of the information regarding this FOA found on EERE eXCHANGE. The specific link to this FOA is at the bottom of the slide, and here you'll find access to helpful forms and templates that we will be discussing throughout the presentation.

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This FOA includes two topic areas: Topic 1 is for the Regional Onsite Energy TAPs and provides funding for up to 10 entities that will engage end-users and key stakeholders in defined multi-state regions. Topic Area 2 is for the Onsite Energy Technical Analysis and Support Center (also referred to as the TASC) and provides funding for one central entity that will provide technical analysis and other support to the Onsite Energy TAPs program.

Regarding multiple applications: An entity may only submit one full application for each topic area of this FOA. Applicants may submit for only one of the topic areas, or they may submit separate full applications for both Topic 1 and Topic 2.

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Because the regional TAPs and the TASC are expected to coordinate closely and work collaboratively, applicants are encouraged to review the responsibilities and requirements of both topic areas for awareness and clarity in developing responsive applications. For applicants under Topic 1, they must propose to operate as a regional TAP in at least one of the 10 regions shown in the map. These are the same 10 regions used by the existing CHP TAP program. Applicants may propose operating in up to three regions, with one being the primary region and the other two being secondary regions. If IEDO selects an entity for multiple regions, we anticipate selecting regions that are immediately adjacent to each other. While IEDO does not anticipate selecting a regional TAP to cover more than two regions, applicants may express their interest in up to three regions. IEDO's evaluation and selection process will include criteria and selection factors to ensure overlaps of geographic coverage are avoided. And IEDO anticipates selecting 6-10 applicants for award negotiations under Topic 1.

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The FOA describes the types of qualifications that applicant teams should assemble. Under Topic 1, applicants should assemble a team with qualifications demonstrating general technical capabilities applicable to a broad range of onsite energy technologies. Applicants should also include policy and market specialists with experience navigating utility, state, and local regulations, programs, incentives, and other interests. The regional TAPs will have access to highly technical and specialized engineering capabilities in specific technology areas through national lab experts that are separately funded by DOE

to support this program and also through the TASC team. Regional TAPs are not expected to duplicate this level of highly technical expertise at the regional level, but regional TAPs are expected to possess technical capabilities that ensure clear understanding of engineering concepts and enable the effective communication of technical information to end-users and stakeholders. Under Topic 2, applicants should assemble a team with highly technical engineering capabilities applicable to a broad range of onsite energy resources. Teams should also include field practitioners with significant knowledge and experience facilitating installation of projects, and programmatic specialists and project coordinators with experience administering technical assistance programs.

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This slide provides an example of how the regional TAP and TASC might expect to work together in a process to address a request for technical assistance. An end-user may make a request of their regional TAP for an initial screening to answer the question, for example, is thermal storage a good fit for my site? The regional TAP represents the end-user from start to finish and work with the end-user to collect data to help respond to their request. The regional TAP will bring the request and the data to the TASC and the TASC will identify and organize the appropriate subject matter experts – in this case on thermal energy storage. They will also identify the appropriate screening tools, and other resources necessary to complete the request. These personnel and resources may be TASC subcontractors, national lab experts funded separately by DOE to support this program, or regional TAP staff with relevant expertise. The network of TA providers coordinated by the TASC will work collaboratively to complete the thermal energy storage screening. And in the last step, the Regional TAP will communicate the results to the end-user.

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Eligible applicants for this FOA include individual U.S. citizens, for-profit entities, educational institutions, nonprofit organizations, and state, local, and tribal government entities. Federally funded research and development centers (also known as FFRDCs) are eligible to apply as a subrecipient, but not as a prime recipient.

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Applications specifically not of interest are those that fall outside the technical parameters specified in the FOA and applications that include approaches that are biased toward a specific vendor or commercial provider technology solution.

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IEDO encourages collaboration and diverse partnerships to maximize the impact of work under this FOA. To assist with the formation of project teams demonstrating expertise across a range of technical, market, and policy areas relevant to onsite energy, DOE is compiling a “teaming partner list.” The teaming partner list allows organizations who may wish to participate on an application to express their interest to other applicants and to explore potential partnerships. To add your information to the teaming partner list, users will see a section, “Teaming Partners,” within the left-hand navigation in EERE eXCHANGE. Select the teaming partner list for Onsite Energy Technical Assistance Partnerships from the dropdown and fill in your information. Updates to the teaming partner list will be made at least weekly. Additional instructions for how to submit a teaming partner list entry are available to download in the “Manuals” section of eXCHANGE. By enabling and publishing this list, EERE is not endorsing, sponsoring, or otherwise evaluating the qualifications of the individuals and organizations that are self-identifying for placement on the list.

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The total amount for awards is expected to be 23 million dollars. That amount is subject to the availability of appropriated funds in future budget years. Average anticipated award amounts under Topic 1 are between three hundred thousand and five hundred thousand dollars per year for a single TAP region and, for Topic 2, awards are between \$1 million and \$2 million per year. Awards will be issued as cooperative agreements with an estimated period of performance of three years for Topic 1 and four years for Topic 2. Cost share is not required for these awards.

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Under cooperative agreements, there will be what is known as “substantial involvement” between EERE and the recipient during the performance of the project. You can read this full statement on page 65 of the FOA. EERE does not limit its involvement to the administrative requirements of the award and has substantial involvement in the direction and redirection of the technical aspects of the project as a whole.

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Letters of intent are optional for this FOA. EERE will use the letters of intent to plan for the merit review process. If you choose to submit an LOI, it must comply with the content and form requirements spelled out in the FOA and on this slide. And they are due next Tuesday, February 28, and must be submitted through EERE eXCHANGE. Note that EERE will not provide notification of acceptance for letters of intent.

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This slide outlines the elements of a full application. Several of these elements will be described in more detail in future slides. Full applications must include:

- The **technical volume**, which is the key technical submission including technical content and information about project team members.
- The **community benefits plan**, which sets forth the applicant’s approach to advance diversity, equity inclusion and accessibility, energy equity, and workforce.
- Two-page **resume** for the principal investigator.
- One-page **letters of commitment** from any proposed subrecipients.
- The **SF-424 application for financial assistance**, which is available on EERE eXCHANGE.
- The **Budget Justification Workbook**, which includes a detailed spend plan. Please note that applicants under Topic 1 that are proposing to cover multiple regions must complete the budget justification workbook for the primary region and identify in the technical volume the additional amount of funding proposed to cover each secondary region.

Full applications must also include:

- A one-page **abstract** that is appropriate for public release.
- A one-**slide summary** of the project in PowerPoint. The specific elements to include on the slide are in the FOA.
- The **Disclosure of Lobbying Activities Form**, which is available on EERE eXCHANGE. Recipients may not use any federal funds to influence or attempt to influence, directly or indirectly, congressional action on any legislative or appropriation matters.
- A list of **current and pending support**, which identifies other sources of funding. The FOA includes a template from NSF that applicants can use.

And there are several other elements listed here that may be applicable depending on the applicant. As a reminder, full applications must be submitted by April 21 through EERE eXCHANGE.

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The next two slides provide more detail on the content for the technical volume – this first slide covers Topic 1, and the next slide covers Topic 2. For Topic 1, the technical volume may not be more than 15 pages for an application to serve one region and 20 pages for an application to serve multiple regions. The applicant should consider the weighting of each of the technical review criterion when preparing the technical volume. The technical volume helps applicants frame the technical information that the application will be evaluated on, and it provides information about what the project is, how the tasks will be accomplished, and the timetable. The technical volume for Topic 1 starts with a one-page cover page that provides basic information on their project, like the title, the topic area, and points of contact. The project overview provides information on the background, goals, and impact of EERE funding. It is suggested the project overview make up 10% of the technical volume. Please note that the percentages listed here are suggested and are not mandatory.

The End User Technical Assistance section is approximately 30% of the technical volume and it describes the applicant's approach for direct engagement with manufacturers and other large energy users. The Market Outreach and Stakeholder Engagement section is approximately 40%, and it describes the applicant's approach for engaging with key market players and stakeholders to address region-specific barriers to deploying onsite energy. The Project Management, Resources, and Commitment section is approximately 20% of the technical volume, and it includes the applicant's plan for managing personnel resources and budget in support of overall project management.

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For Topic 2, the technical volume may not be more than 20 pages. It also includes a cover page and a project overview section. The Technical Analysis Approach section is approximately 40% of the technical volume and it describes the applicant's plan for coordinating and completing the technical analysis activities of the program. The Operational Support Services and Project Administration section is approximately 30% of the technical volume and it describes the applicant's approach for supporting operational and administrative activities. And the Project Management, Resources, and Commitment section is approximately 20% of the technical volume and – again -- it includes the applicant's plan for managing personnel resources and budget in support of overall project management.

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DOE is committed to investing in programs that deliver benefits to the American public and leads to commercialization of technologies and products that foster sustainable, resilient, and equitable access to clean energy. The goal of the three-section community benefits plan is to allow the applicant to illustrate engagement in critical thought about implications of how the proposed work will benefit the broadest swaths of American people and lead to broadly shared prosperity, including for workers and disadvantaged communities. Applicants must address each of these three sections. Appendix F of the FOA provides some examples of things that you can be thinking about in each of these three areas when you prepare your plan. Several of those examples are listed on the slide.

The DEIA section of the plan must demonstrate how DEIA is incorporated in the project objectives. Some examples noted from the appendix include building collaborations and partnerships with researchers and staff at minority-serving institutions, providing anti-bias training to project teams, and making research products and engagement materials accessible in a greater variety of formats.

The Energy Equity section of the plan should include a discussion of benefits to disadvantaged communities and describe how the project contributes to the Justice 40 Initiative. The Justice40

Initiative directs 40% of the overall benefits of certain federal investments to flow to disadvantaged communities. The plan may identify applicable disadvantaged communities to which the project benefits flow and can include a discussion of the relevance to the eight Justice 40 benefits, as applicable. Some examples noted in the appendix include describing how the project will support economic development in diverse geographic or demographic communities, creating a plan to engage equity and justice stakeholders, and describing how the project was informed by input from a wide variety of stakeholders.

The Workforce Implications section should articulate future workforce implications of the project or a plan for understanding what those implications are. Some examples noted in the appendix include creating a literature review of workforce implications, describing how the project will support training of workforce, or planning to evaluate how the project may result in potential workforce shifts. Applicants are not required to implement any of these specific examples and should propose the plan that best fits the project. Creativity is encouraged.

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This slide provides some additional resources that may assist you with the community benefits plan. First, a website for more information on the Justice40 Initiative. Second, a tool that allows users to explore and produce reports on census tracts that the U.S. DOE has categorized as disadvantaged communities. To clarify, applicants under Topic 1 should submit one-single plan that discusses community benefits in their region. Applicants under Topic 2 should submit one-single plan that discusses community benefits at a national-level, including how the applicant will contribute to and support the regional TAPs in their efforts to address community benefits in their regions. And with that summary of the application, I will turn it to my colleague Jamey Evans to share more on the merit review and selection process and provide some helpful submission reminders.

*Jamey Evans:*

*Next slide:*

Thanks, Meegan. The merit review process consists of multiple phases that each include an eligibility review and a thorough technical review. Rigorous technical reviews are conducted by reviewers that are experts in the subject matter of the FOA. Ultimately, the selection official considers the recommendations of the reviewers, along with other considerations such as program policy factors, to make the selection decisions.

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Applications will be evaluated against specified evaluation criteria. The next two slides summarize the criteria for Topic Area 1. There are four overarching criteria. The first criterion makes up 35% of the applicant's score and covers the applicant's technical approach and viability. The second criterion makes up 30% of the score and covers the applicant's market transformation and impact. The third criterion makes up 20% of the score and covers the applicant's team and resources.

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And the fourth criterion makes up 15% of the score and covers the community benefits plan.

*Next slide:*

The next two slides summarize the merit review criteria for Topic Area 2. Again, there are four overarching criteria. The first criterion makes up 35% of the score and covers the applicant's technical approach and viability. The second criterion makes up 20% of the score and covers the applicant's

market transformation and impact. And the third criterion makes up 30% of score and covers the applicant's team and resources.

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And the fourth criterion makes up 15% of the score and covers the community benefits plan.

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After experts review the applications against the merit review criteria that we just covered, EERE will provide applicants with reviewer comments. Applicants will have a brief opportunity to review the comments and prepare a short reply to reviewer comments responding to comments however they desire. The reply to reviewer comments is due by the date and time provided in the FOA and on this slide, which is May 19, 2023. Applicants should anticipate receiving the independent reviewer comments approximately three business days before this due date. The reply to reviewer comments is an optional submission. This a customer-centric process that provides applicants with a unique opportunity to correct the misunderstandings and misinterpretations and to provide additional data that might influence the selection process in their favor. The replies are considered by the reviewers and the selection official. Replies to reviewer comments must conform to the content and form requirements listed here, including maximum page lengths. If a reply to reviewer comments is more than three pages, EERE will review only the first three pages and disregard any additional pages.

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The selection official may also consider program policy factors in making their selection decisions. This includes:

- Past performance of a currently active CHP TAP.
- The degree to which the project optimizes the use of available EERE funding.
- The level of industry involvement and ability to overcome key market barriers.
- The degree to which the project is likely to lead to increased employment and manufacturing.
- The degree to which the project will accelerate transformational technological advances in areas that industry by itself is not likely to undertake.
- The degree to which the project represents a desired geographic distribution.
- The degree to which the project incorporates DEI elements, including but not limited to team members from MSIs, HBCUs, minority business enterprises, minority-owned businesses, woman-owned businesses, veteran-owned businesses, or members within underserved communities.
- The degree to which the project will employ procurement of U.S. manufactured products.

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There are several one-time actions before submitting an application in response to this FOA, and it is vital that applicants address these items as soon as possible. Some may take several weeks, and failure to complete them could interfere with an applicant's ability to apply to this FOA, or to meet the negotiation deadlines and receive an award if the application is selected. All application materials for this FOA must be submitted through EERE eXCHANGE. To access eXCHANGE, applicants are required to have a Login.gov account. For more information, refer to the eXCHANGE multifactor quick guide in the Manuals section of eXCHANGE. Please obtain a control number in eXCHANGE before the first submission deadline. Although not required to submit an application, the following registrations must be completed to receive an award under this FOA.

First, is the System for Award Management (also known as SAM). Register with SAM. Designating an electronic business point of contact and obtaining a special password called an MPIN are important steps in SAM registration. Please update your SAM registration annually.

Second is FedConnect. Register in FedConnect. To create an organization account, your organization's SAM MPIN is required. For more information about the SAM MPIN and other registration requirements, review the FedConnect "Ready, Set, Go! Guide" at the FedConnect site.

Third is Grants.gov. Register in Grants.gov to receive automatic updates when amendments to this FOA are posted. However, please note that letters of intent and full applications will not be accepted through Grants.gov.

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Again, all required submissions must come through EERE eXCHANGE. EERE will not review or consider applications submitted through any other means. There is a user's guide for applying for DOE EERE FOAs in the Manuals section on eXCHANGE, which you can access by clicking "Manuals" in the lefthand side bar on the eXCHANGE website.

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A few of the key submission reminders.

1. Check your entries in eXCHANGE to make sure you haven't entered anything incorrectly that could cause your application to be deemed ineligible.
2. Consider submitting your application materials at least one to two days before the deadline just in case there are any technical glitches.
3. Don't forget to hit the submit buttons after you have made all your changes.
4. Consider printing or saving EERE eXCHANGE materials for your own records.

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The last item for today's webinar is questions. DOE personnel are prohibited from communicating (in writing or otherwise) with applicants regarding the FOA except through the established question and answer process. All questions that folks asked through the Q&A feature during this webinar today will be reviewed and posted in the Q&A spreadsheet on EERE eXCHANGE. Questions regarding this FOA can also be submitted at any time up to three days before the application due date to: [onsiteenergy@ee.doe.gov](mailto:onsiteenergy@ee.doe.gov). All the questions and answers related to this FOA will be posted on EERE eXCHANGE. To see all the answers, you must navigate to this specific FOA and look for the Q&A spreadsheet under the "documents" heading. DOE will attempt to respond to a question within three business days, unless a similar question and answer have already been posted on the website. Feedback on individual concepts will not be provided through Q&A.

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This completes today's webinar, and we will now be ending the broadcast. Thanks for attending, and goodbye.