

Taylor Moot (TechWerx):

Thank you. Hi, everyone. And thank you for joining us today. We're excited to host this informational webinar on the Connected Communities data opportunity.

This opportunity is being funded by the Building Technologies Office or BTO at the Department of Energy.

Next slide, please. So just a really quick intro. My name is Taylor Mood and I'm part of the TechWerx Hub. TechWerx is an innovation hub managed by RTI International in support of the Department of Energy.

And our goal is to facilitate connections among federal academia, nonprofits, utilities, and small businesses across the U.S.

To hear more about any new opportunities that come up or any last minute updates on the Connected Community Data's opportunity, we recommend following our page on LinkedIn as well as signing up for our newsletter via the link on our website.

Before I move on, just a couple of housekeeping things that I want to make sure we run through.

Questions are going to be handled towards the end of the session and we are reserving the vast majority of time for questions, so please enter them in. We'll be using the Q&A function of Zoom and we'll be addressing the questions that get the most votes first. So please go ahead and vote for whatever questions resonate with you so that we can make sure that those get answered first.

We might not be able to get through all the questions today, but we will do our best to do so. If we can't get through all the questions today, we will get all those questions answered by the Department of Energy and get those posted on the FAQ page as soon as possible., knowing that this is due very soon.

Just a couple of other small things per DOE guidance. We don't allow any AI bots on the webinar, such as Otter AI or any other note-taking AI bots. You shouldn't need them because this is being recorded. And the transcript as well as the slides will be available on the website as soon as possible. But just so you know, if we see them, they'll be kicked off of the session.

Last, as a reminder, this is webinars being recorded and we'll get it updated to the TechWerx website as soon as we can, along with those slides and transcript.

Next slide, please.

So today we have Nick joining us from BTO at Department of Energy. And with that, I'm going to turn it over to Nick to walk through everything.

Nicholas Ryan (DOE BTO):

Excellent. Thanks so much, Taylor. In that vein of wanting to keep time for mostly questions, I'm going to breeze through these couple of slides and We'll get to good questions. Okay. So for those of you who are not familiar, I am from the Building Technologies Office, underneath the energy efficiency and renewable division within the Department of Energy.

The office's mandate focuses on research development and demonstration to accelerate the adoption of technologies and techniques that enable high-performing, affordable buildings And it means America's needs for resiliency, health while supporting a reliable energy system.

Next slide, please. So this particular opportunity is based around and in light of our connected communities initiative, this is specifically talking about or interested in data collection and data analysis.

So this particular opportunity is intended to help make the grid more efficient, flexible, and resilient by further validating the use of technical measures located at the grid edge. This opportunity will help increase the acceptance of grid edge technical measures and innovative planning strategies by utilities, communities and regulators as viable approaches towards efficient infrastructure investment for decarbonization. And this covers a large spectrum of technologies that we want to interface with the built environment and the grid.

Next slide, please

As indicated, purpose of this opportunity will support the collection and analysis of existing pilot program data focused on validating grid edge technical measures and innovative planning strategies or infrastructure investment, right? We are looking for candidates that have not only the capacity to deliver quality and insightful high-level analysis. Around the data of interest, but we're also looking for candidates that have connections to the grid ecosystem in order to really have the relationships needed to provide not only robust data, but also robust data analysis. We are anticipating that each awardee will receive around a million dollars in funding and require no cost share for this opportunity. We are really looking at a high level for different technical measures at the grid edge, right? This can be behind the meter, in front of the meter. We are fairly open to that.

And we are looking really to understand and show tangible real world evaluation of the coordination and organization of all of the different inputs into the grid system, right? So

this can be energy inputs like DIRS, as well as outputs, right? You know, EV charging and things like that, right? We are really, really wanting to understand the demonstrated ways that folks have started to figure out smarter, more effective ways of managing these systems across the country. Okay, next slide, please.

So this is our timeline. So this is our final session for receiving public question and providing answers and things like that. Applications are obviously due This Thursday, and we are looking to have a fairly quick turnaround and get these awards started hopefully by April of this year. Okay, I think that's everything, Taylor.

Taylor Moot (TechWerx):

Awesome. Okay. We have one question that came in, but I'll encourage you all. This time is for you. So the more that we can be helpful, the better off we are.

Okay, so the first question that's come in is Can we submit the letter, the support letter after the deadline considering some paperwork took longer than expected because of the holiday season?

Nicholas Ryan (DOE BTO):

Carrie, I might call on you for process here. My understanding is that these deadlines are fairly immovable, right? And obviously it would be ideal to have all the components I know that there's been a number of questions about if about if the utility is applying right some of this is, you know, but Carrie, where do you land on this? The processing side of things.

Carrie McIntosh (DOE OTT):

Yeah, so we know that this is a really, we know that this might be, this deadline's coming up and that it was over the holidays. But we do have to have all parts of the application by the deadline in order for your application to be considered. So we encourage you to really do that outreach now to try to get all the parts of the application submitted and reach out and tell your partners that deadline as well.

Nicholas Ryan (DOE BTO):

Yes. Okay. Secondary question here. Sorry, Taylor, I forgot to go to the second one.

Taylor Moot (TechWerx):

No, you're good. We're just here to do all the things. Okay, the next question is, do we need a letter from direct from an electric company as a teaming partner again the letter of support The support letter is holding us up. That is a holdup for us.

Nicholas Ryan (DOE BTO):

So I think in reflection of this question as well as the last one, right? If you are able to get anything that indicates support for this. I would encourage you putting the application because you in negotiation, which is later on right and Carrie please step in and correct

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me if I'm if wrong here, right? If that extra time allows you to have a more robust letter I think that is allowable, right? But I understand this is a holdup, but I would not view it as it needs to be view as it needs to the final version of it. I think any sort of letter of support would be looked favorably upon. I think that would meet the criteria for us, given what we're looking for, right? It's not the only thing that we're, it's not the most important part of this, so to speak, right? It's just one of many parts.

Taylor Moot (TechWerx):

Okay. Next question is, are utilities eligible to apply as prime?

Nicholas Ryan (DOE BTO):

Sorry, there's so much here. We have an answer we've prescribed for this. Taylor, I don't know if you have the FAQs that are that are open up If you'd read from that that'd be good.

Taylor Moot (TechWerx):

Yeah, I can pull that really quickly. So let me grab that one second. I'm sorry, we do just want to be very specific about this because obviously this matters quite a bit.

So utilities... Basically, the project performer can work with utility data, but the project performer cannot under any circumstances or conditions control or manage any element of the indoor environment in which people are present. That includes, but is not limited to actions like resetting thermostats or controlled lighting that affect indoor environments. So... That is the specifics.

Nick, I don't know if you want to add any additional color to it.

Nicholas Ryan (DOE BTO):

Yes. So I will make the distinction right is The funding that is coming from this particular effort cannot go to fund activities that control the indoor environment, right? If you have separate arrangements that are funding your pilot demonstrations. That that is the data you'll use that's fine. If it is past projects you've done that have that data, that is fine as well.

The distinction here of utilities being eligible to apply or not apply is based on you cannot use the money from this PIA to fund any sort of activity that affects indoor environment, right? You can use it to do analysis and engage other stakeholders and things like that, right? But anything that directly moves towards activities that affect indoor environment this money cannot be used for that, right?

Thanks, Taylor.

Taylor Moot (TechWerx):

No problem. Next question is, can you speak to the balance between data and analysis for this opportunity? For example, is the focus mostly on pulling together valuable data sets or is the focus on executing analysis on top of raw data sets during the period of performance?

Nicholas Ryan (DOE BTO):

The emphasis is around the analysis, right? Obviously, we would like to have access to the data sets, right? And I think if you look into the application, right, there is considerations around PII. We do not want any sort of raw data set that carries that PII, right? So you're still going to have to go through a filtering process, right?

But the core of what we're looking for is the analysis on that data, right? What are the insights that have been filed what are performance things like that's really what we what we care about. But we are going to cross-reference and check the analysis that we are given based on the data sets that you are using, right? So we definitely do need both.

But we would say the pronounced effort is on the analysis and less effort, so to say, on aggregating the data set, right? And that's the importance of having these when we talked about the ideal candidate, right, is having access to these data sets should be not a heavy lift, right? The analysis should be the heavy lift.

Taylor Moot (TechWerx):

Next question, and I'll say keep on adding them keep on up voting them, liking them, all that good stuff. We're here to help. So the next question is, is it preferred that this data is made available on an ongoing basis and is updated or is a one-time transfer of historic data, for example, like two years of data preferred?

Nicholas Ryan (DOE BTO):

I think the important part of the important part I think there will always be an appetite for ongoing data, right? So if that's something you guys can provide in your application That would be great. I think what we are really looking to get here right having data that is from real world pilot projects, right? Rather than model data or anything like that, right? And what the effect of these different grid edge measurements have had in the real world, right? So if your transfer of data is just based on a set of pilots that happened over two years, right? And you do the analysis on that and it showed X, Y, and Z things. Great. That is sufficient, right? But if there isn't a way that you can have kind of continual updates to that data, that also would be great to see as well. So it's not necessary but Interesting to see.

Taylor Moot (TechWerx):

Next question is also about data. Is the DOE expecting to receive raw data files as part of the grant or adjust the research outputs from the analysis done under the grant?

Nicholas Ryan (DOE BTO):

We are expecting both. Like I indicated to the previous question, I want to be very specific about what we call raw data sets right um it is not information. It should not be data that carries PII or other sensitive things, right? We would like the data to be filtered down so where we can share that within our ecosystem, like to national labs and universities of the nature. But really our primary output we're looking for is the analysis, right? That is a more important part. That is the insights we are trying to gain from this opportunity.

Taylor Moot (TechWerx):

Next question is the application, the opportunity page, it lists out some specific utilities in certain regions, for example, in the northwest Are you looking for partnerships with those specific utilities or would utilities in general from the Northwest be encouraged to apply?

Nicholas Ryan (DOE BTO):

Northwest in general, totally, totally encouraged to apply. We just listed those out as a few examples. That's it.

Taylor Moot (TechWerx):

Next question is If national labs are participating as a partner but not the lead applicant, would the funding flow through the prime to the lab or would the lab funding come separately from the DOE? And if the latter does that portion of the budget need to be noted in any way in the application?

Nicholas Ryan (DOE BTO):

Please.

Carrie McIntosh (DOE OTT):

So I can take this one. So for just as clarity for everyone um If national labs are selected as prime, I know this question isn't. But if they're selected as prime, the mechanism for national lab providers will be different than that with private sector applicants. Most notably, the labs would receive funding for work directly from the DOE via their M&O contracts, not via tech works However, if they are a partner to someone who is applying as the primary recipient of this, the primary recipient and the national lab could make their own arrangements separate from this award funding. So the national lab did not receive any direct funding via TechWerx.

Nicholas Ryan (DOE BTO):

Thanks, Carrie, right? So I think in a similar fashion to Right. If there are separate agreements that are organized through your two organizations right whatever we don't really have any sort of say on that, right? As long as you can identify and show that this funding will not go to the National Labs directly, right? That's the only thing we need. However else you take care of that, that is on your organization and for you guys to manage.

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Taylor Moot (TechWerx):

Next question is, where will the data be shared? The application says the DOE community. Does that mean all the national labs? We want to understand the extent that it will be shared and can we put any restrictions on where it goes?

Nicholas Ryan (DOE BTO):

Yes, absolutely. Right. So National Labs, I think, is a good proxy. I think other offices within the Department of Energy, right? There are offices that care about You know, the, you know, a transmission, electricity, grid, EV, right? There's a number of offices that care about this interdisciplinary space, right? So those are the folks that we have in mind.

If you would like to propose or put forward, you know, we would like to move forward on this, but we have concerns and we would not like our data to be shared with X, Y, and Z., please put that forward. That obviously will be a consideration that we have to take into account. I don't think that should hold you back from putting forward an application.

We can work through those things during negotiation if we get that far. So please let us know your parameters, but understand right we are we're looking to use this on multiple fronts And our goals, I would say, just as an overall disclaimer right, our goals as the national as from the federal government right to the service to the country, right? We are looking to find the best solutions, the best ways to save money and be more effective, be more resilient, right? So I understand in many regards on the private side of things. There's a competitive thing to consider, right? Our goal is to serve the nation as a whole right so that's how we're going to use this information is to those ends, regardless of who that might look like specifically. Thanks, Taylor.

Taylor Moot (TechWerx):

So the last question we have, so again, I'll encourage you Please ask more questions if you have them.

But this one we have right now is the application asks for a letter from legal counsel to ensure the ability to share data within the DOE ecosystem. When do you need it?

Nicholas Ryan (DOE BTO):

We have a letter from legal counselor. So this letter um be part of your application, right? We would definitely want to see as part of the application that Whoever is whoever owns the data, right? Whether that be your entity or a different one that you are partnering with. That there is an understanding that this information the analysis will be shared, right? I am more amenable and understandable that if folks are not wanting to have the raw data sets. Shared, I think that's more understandable but the analysis that is very much freely going to be shared around uh

Taylor Moot (TechWerx):

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And just to reiterate, when you go into the application portal, you'll see that that letter from legal counsel is required as part of your application. So it must be submitted By January 9th at 5 p.m. To have your application considered complete.

That rounds out all the questions we currently have. We have the full hour, so please drop questions in the chat as you still think of them. We'll hang on for a couple more minutes to make sure that we answer any last minute questions.

We won't hang out for the full hour unless you all need it.

Okay, can you clarify? Did you say that we do not need to share data and it's okay just to share the data analysis?

Nicholas Ryan (DOE BTO):

No, we as DOE in final deliverables, we would need both.

Taylor Moot (TechWerx):

Okay. We'll hang out for another maybe two more minutes to see if any questions come in.

Please, if there's anything on your minds, let us know. If you have any questions that we can help answer to help you all get those applications across the finish line, that's what we're here for.

Is there a preferred data format for sharing analysis results?

Nicholas Ryan (DOE BTO):

I... Don't think so, at least for the first application, right? For the nth year i think you know, um. If it's you know if it's written work like narrative right kind of runs through like an academic paper. I think that there's merit there slide deck right more visually appealing, right? So I think the final product which it comes in.

We can negotiate on that. I think it's more about, I think what is important on the 9th is what kind of analysis you are intending to provide, right? What is your methodology behind it? What insights are you trying to provide to us? That would be the more important thing to highlight, and the mechanism of that, we can be flexible with, right? Excel sheet, whatever, right? I think that's okay.

Taylor Moot (TechWerx):

Next question is, are you looking for something around non-wires analysis?

Nicholas Ryan (DOE BTO):

Hmm. Okay, this might be out of my technical jargon depth here. So we will, as a takeaway, do this as an FAQ.

But if you want to resubmit your question with than what non-wires means exactly that would be would be helpful. My apologies for um the gap here. Okay.

Taylor Moot (TechWerx):

Yeah, you can either submit it in the Q&A chat or sorry, the Q&A chat here, or if you want to send an email with additional, either way, we'll make sure that DOE answers it.

Next question is, could you elaborate again on the scope of analysis and if the DOE will specify more specific metrics Wait, sorry, let me start over Could you elaborate again about the scope of analysis and if the DOE will specify more specific metrics are of interest based on the data available?

Nicholas Ryan (DOE BTO):

Elaborate again on the scope of analysis and if the DOE will specify more specific metrics on the interest based on the data available.

I think to some degree. There will be opportunity to further refine the type of analysis that we would like to see. I think it is... it is on the applicant to show their technical merit in putting forward a methodology of analysis that aligns with the overarching goals of the opportunity. Taking into consideration of what we are trying to achieve here, right? Be able to talk about grid edge measures that are improving resiliency, reliability. All the different elements of a healthy functioning grid right The analysis we want to show is they're using DER systems and using smart managed systems that there is an effect on the quality of the grid, right? So if that's our overarching endpoint we're trying to reach and the policy that we're trying to be smarter on, right? Analysis that proves or shows that these measures are capable of helping us build out a more resilient and reliable grid, that's what we want to see, right? But again, there'll be negotiations in this process. So, you know, the very specifics of the analysis, right? We can work with that but going into it right we definitely want to be working with folks who have a strong, innate understanding of the type of analysis that underpins some of these policy measures that are around an effective and more modern grid system, so to speak.

That's why I emphasize methodology, right? Because then that's more about intent and structure rather than specific details, so to speak. But obviously there's a balance there. Anyway, sorry, Taylor.

Taylor Moot (TechWerx):

No, no. More info is always helpful. The next question I'll ask, but I'll also answer.

Because this is a little bit more on the TechWerx side. So once awarded, how are the funds transferred to the firm? Is it a lump sum or EFT wire?

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So the way this works is that each milestone or sorry each All payments are milestone based. So basically in that application template that you have, you'll see those milestones. That's how we basically we'll consider those payments made. All of that will be finalized during the negotiation period.

But yeah, these are all fixed price awards. And what will happen is once you've completed those milestones, you'll invoice TechWerx and then TechWerx will We'll process those invoices and the payments will be made within 30 days of that invoice submission for each milestone.

There are a little bit more details in the FAQ section on the opportunity page around exactly how the invoicing works. So feel free to check that out as well, but also You're welcome to ask more questions during this session as well. Carrie, I'll pass it to you to see if I forgot anything, but I think that's the bulk of it.

Carrie McIntosh (DOE OTT):

Yeah, Taylor, you did a great job. Explaining it and I don't have anything else to add.

Taylor Moot (TechWerx):

The next question is, is the data transfer plan meant to address transfer from the utility to the applicant or from the applicant to DOE or both?

Nicholas Ryan (DOE BTO):

So it is primarily intended for the transfer from applicant to DOE, right? So whoever is owning your data and they're sending it to you, that's your agreement, to figure out we again as i've stated, we do not want any sort of data set that has PII information onto it.

And then we want to understand how you are transferring that data to DOE, right? Obviously, I think there are more simple and more complicated ways of doing that, right? But we want to ensure that the data that you are sending to us is kept safe. And is being handled responsibly, right? So if that's just normal course of action for your organization, great, no problems at all, right? But if there are additional efforts or considerations you are putting into place Please make those note, right? Again, this is something more of a, not the most important part of the overall application, right? But it is necessary to make sure that we are not getting ourselves into trouble or setting ourselves up for any sort of complications down the road. We want to be free and clear to make sure that we can say, hey, we know that this information was taken care of on both sides of the transaction.

Taylor Moot (TechWerx):

Next question is, and I might answer this one first and then turn it over to you, Nick, to kind of add any clarification. But according to the application, it states that you Sorry, it states that the you describe existing or prior relationships with the utilities. So where is it required that you have a letter of support from the utility?

So if you look in the application portal, you'll see two required sections or there's a couple of required questions, but one of them is where you submit your actual proposal, that couple of page report or proposal. And then you'll also see a place that requires a letter of support from the utility as well as that letter from legal counsel. So that is specifically listed in the application portal itself.

But Nick, feel free to add any other details.

Nicholas Ryan (DOE BTO):

I would say just a distinction here, right? And this is basically partially based on um an assumption on our end, right? We assume that utility is going to be the owner of the original data, right? In most cases. They're going to be the owner of the data, right? So if you have a different organization that is not a utility that is the original owner of the data, that's who you need the letter of support from, right?

That's really the crux of it, right? So that could be maybe a state organization owns it. Maybe it's an entirely private organization that owns that field validation data, whoever owns the original data, that's who you need the letter of support from.

If that's utility, great. If that's someone else. That's totally fine, right? That's really the crux of it, not necessarily exclusively from a utility, right? But whoever owns the data, who's giving you permission to use and transmit that data.

Taylor Moot (TechWerx):

All right. Last question we have in this batch. Is it possible to get an extension for the January 9th deadline? It may take longer to get the letter of support from the utility we work with and the legal counsel letter. So I want to see if there's any leeway.

Nicholas Ryan (DOE BTO):

Unfortunately, I do not think there is for this particular effort. So I am sorry for that. We definitely recognize this is a short turnaround.

But there are conditions that we are having to work through, right? I will say this is a very important area for us. Broadly right so um you know we you know this will not be going anywhere uh too soon, right?

Unfortunately, no, no extension there.

Taylor Moot (TechWerx):

Okay, that is the last of the questions that we have currently. So again, everyone that's still on the line.

Please add your questions and we'll still hang out. Okay, so another one came in. So if the applicant owns the data, it should be stated in the application.

Nicholas Ryan (DOE BTO):

Yes. Yeah. If you use your data and you are also going to be doing the analysis right All we really need is a letter indicating, right? It certainly does not need to be a full letterhead, right? If it is from persons within your organization that can give the sign off to do these activities, that's all that we need, right? We just want to make sure that it is documented within your organization that you are using your own data, you are sending your own data, and we are allowed to use that once that organization or once that agreement has been reached, right?

So again, does not need to be pages and pages of content, right? If you make it concise.

More than happy to receive something like that it just has to be written down that there's an acknowledgement there.

Taylor Moot (TechWerx):

I'm going to ask if we can move to the next slide while we wait for any last questions to come in.

So... We have a full 25 more minutes, so we're here to hang out. But I will say if you all are starting to trickle out and you feel like your questions have been answered, we do have a QR code here. If you have any feedback on this session that you want to give us, we always love to know.

That being said, please feel free to keep... Submitting your questions. We'll hang out for a couple more minutes, see what else comes in, and then we'll kind of go from there.

We have one question, but it's just a thank you. So I'll read it out loud. But it just says thank you. The session was very informative. So thank you for the kind note.

Nicholas Ryan (DOE BTO):

Thanks for coming. Appreciate you guys taking the time to learn more about this opportunity.

Taylor Moot (TechWerx):

I think we'll give it until... 36-ish after the hour. Again, please add your questions if you have them. We are happy to stay as long as we need to get them answered.

Just in terms of everyone's time, we'll wait until 37 and then we'll call it if nothing else comes in.

We just want to say thank you again for your time. Really appreciate you all coming and making the effort on this opportunity. We know the timeline is very short. We will get all of the FAQs and everything updated on the website as soon as we can. But in the meantime, if any questions come up, please email us at info. Sorry, info at TechWerx.org. It's the fastest way to get in contact with us and we'll be monitoring that very closely. Thank you so much for attending.

Nicholas Ryan (DOE BTO):

Bye, everyone.