CARD Stakeholder Meeting February 3, 2016

Mary Sue Lobenstein R&D Program Administrator Conservation Improvement Program



Introductions

Conservation Improvement Program (CIP) Staff Jessica Burdette, CIP Supervisor

- Anthony Fryer, CIP Coordinator
- Mary Sue Lobenstein, Research & Development Administrator
- Adam Zoet, Analyst and Energy Planner
- Laura Silver, Analyst and Project Manager
- Mark Garofano, Analyst and Engineer

Energy Grants and Contracts

• Morgan Grelson, Sr. Grants Specialist





Goal of Today's Webinar

Ensure successful CARD program that addresses needs of Minnesota's utility Conservation Improvement Program (CIP)

- Communicating more clearly
- Soliciting input & feedback
- Implementing improvements

RESULT: even better proposals & more effective research projects

Building the Road to Success



Agenda

- 1. CARD History & Background
- 2. CARD RFP Process
- 3. Creating Successful Proposals
- 4. Questions & Answers
- 5. Input & Feedback



Agenda Item #1 1. CARD History & Background 2. CARD RFP Process **3. Creating Successful Proposals** 4. Questions & Answers 5. Input & Feedback



MN Applied Research & Development Fund

Purpose to help MN utilities achieve 1.5 % savings goal by:

 Identifying new technologies or strategies to maximize energy savings;



- Improving effectiveness of energy conservation programs;
- Documenting CO₂ reductions from energy conservation programs.

Minnesota Statutes §216B.241, Subd. 1e.

\$3.6 million annual utility assessments



Legislatively Mandated Funding

SB 2030 - \$500,000

SB 2030 ENERGY STANDARD

40 2030 Home Overview AlA - 2030 Case Studies Database Links. Contact

B3 Sustainable Building 2030 Energy Standards

The 63 businesses Business 2003 018 2000, Elency Standard is a progressive anergy (meanator) originals designed to significantly reduce the energy and carpon to Moneosta (ammercial, matubilitaria and industrial business). Based on the national Auctivativativa program, playam, 18 2003 mat been takened to the news) of formators, Based on the national Auctivativativa program, playam, 18 2003 mat been takened to the news) of sensate business. The 8 2000 Energy Standard to at project built after 2003 a 60 percent basis mat of an average business. Then 9 2015, the transcet associates 20 percent between and so on unit of a 2004 percent basis mat of an individual to 2000. The 58 2000 Energy Standard is recaived on all projects built after service general objection bond funding from the State of Menneods. Sta 2000 can also be used on a violated by basis on any project. If the 818 Quaderies am used, the 68 2000 Energy Standard is automatically included in the process. Data basis business as put of the 618 and 58 2000 programs will be publicity accessible, including in the 810 Care Blads. Database Lines memory.



BO CASE STUDIES DATABASE

The B3 Case Studies Database provides design and performance information on projects using the B3 Quidelines and the 30 2000 Energy Standard, Each project uses study includes a Biorecard with severic. All Minnewitz fitzle tionited projects-both new and substantially renovated-that have not begun their Schamatic Design Phase prior to January 1, 2015 elit be required to meet the Minnesote Sustainable Building 2000 (58 2000) 2015-2019 Energy Standard Projects that have begun their Schematic Design phase prior to this date will be subject to the prior 2010-2014 requirements. Minneedia Suetanatre Building 2000 outlines specific performance targets for energy use in buildings until 2030. Every five years. the standard for total energy use in buildings is to be reduced, starting in 2010 at 50% reduction for new construction and ending in 2036 as a 100% reduction (nel Jero carboro. Note that several documents below have otherest varsions depending in which Standard is being used.

NOTICE

Beginning on July 1, 2010 all Winnessta State bonded projecti-mea and subdatiliary recovated—that have not alrawed stated the Schematic Design Prease August 1, 2007 will be required to meet the Minnessta Subtancia Building 2020 (38 2020) energy statedards Building 2020 (38 2020) energy

TO BEGIN THE PROCESS

As such as you have identified that you have a project that is required to use the 50 2020 Energy Standard, contact 50 4000C Support to get your project set as the ED-4000C Tracking Tool Contact Patrick Smith (12-401-475) or shattStageOnex.org for assistance.

DOCUMENTS

88 2030 ENERGY STANDARD FACT DHEET

CERTs - \$500,000





Conservation Applied Research and Development (CARD)

\$2.6 million annually Request for Proposal (RFP) process Six RFP funding cycles 2008 -2014:

- Nearly 300 proposals
- 74 projects funded

RESEARCH	& DEVELOPMENT
🗆 Ideas	
- Innovai	lion
🗆 Inspira	tion



Past Grantees

- Service Providers
- Program Implementers
- Non-profits
- Universities
- Research Institutes
- Consulting Firms
- Minnesota Utilities





CARD Spending by Sector





Locating CARD Projects and Final Reports

CARD Research Project Search Tool

COO K http://mn.gov/commerce/industries/energy/	utilities/cip/card-grant-search/index.jsp	😉 Geother 📴 proposa 🕱 Energy 🕷 CAR 🛪 🕜 😂 😒						
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Locating Info on CARD Program

Minnesota Department of Commerce Website





Agenda Item #2 1. CARD History & Background 2. CARD RFP Process **3. Creating Successful Proposals** 4. Questions & Answers 5. Input & Feedback



Overview of CARD RFP Process

Overview

- 1. Identify funding topics & develop RFF
- 2. RFP posted
- 3. Notice of Intent (NOI) unless RFP topic very specific
- 4. Responders submit full proposals
- 5. Proposals evaluated & projects selected
- 6. Contracts negotiated and fully executed
- 7. Work begins





Step 1 Identify Funding Topics

Sources include:

- Input from utilities/stakeholders
- Reports, bulletins, blogs, webinars, conferences, etc.
- Technical Reference Manual (TRM) needs
- CIP overall and annual priorities

Both specific & general topics RFPs

No communication about specific topics







Examples of Topics

General Funding Topics

- Field Studies of New Technologies
- Market Potential Characterization Studies
- Innovative Program Strategy or Design

Specific Funding Topics

- Assessments of Plug-Load Control Devices
- RTU Characterization & Performance Baseline
- Small Embedded Data Center Program Pilots
- Combined Heat and Power White Paper





Step 2 Publicly Post RFP

- **Commerce RFP page**
- **State Register**
- **CIP Newsletter**

Lizensees Policy, Data & Reports Media About Us

Request for Proposals

A Regunt for Proposals (RPI) from the Minnesola Department of Commerce is a formal invitation to potential contractors or grantees to submit a proposal that responds to the need identified in the RPP. The RPP is the procurement process where the agency can judge if the contraction's experience, qualifications, and approach will provide the best solution to meet the need identified in the RPP.

Note: Any amendments to a RFP will be sent to the email address you submit here. If the email address you submit is invalid, you will not receive amendments, updates, or other information.

If no RFPs appear on this page, potential contractors can also look for contracting opportunities in the State Register. the Department of Administration and the Office of Grants Management websites.

Request for Proposals (NP) Email Updates

To sign up for RFP updates offered by the Minnesota Department of Commerce or to access your subscriber preferences, please enter your contact information below.

Minnesota's Commitment to Diversity and Inclusion

The State of Winnesota is committed to diversity and inducion in its public proviment process. The goal is to ensure that they providing global and services to the State are representative of our Winnesota communities and include businesians earned by minority of the services of the state are representative of our Winnesota communities and include businesians introger relationships and engagement within our continuuties. And botany economic development and equality.

To further this commitment, the Department of Administration operates a program for Ministrationabased small businesses



- Email to subscribers of certain email topics
 - CIP topic
 - Request for Proposals topic
 - Funding Opportunities topic





Step 3 Notice of Intent (NOI)

Used for general topics only

Two-page summary of idea

- Project goal
- Funding topic fit
- Project justification
- Overview and outline of scope of work

Makes proposal process more effective

- Responders can focus on specific ideas of interest
- Evaluation more efficient

No longer require project partners at this stage



This top row for COMMERCE USE ONLYS	Notice of Intentio Propose (NOC ## #
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A. Perform Field Study or Demonstrat B. Pilot or Demonstrate an Innovative	the following P1/2014 02 Funding Topic (select only ONE), 7 on of fancowing Technology in Technology hased Approach Program or Project Implementation Strategy or Design ⁴ Efficiency Potential and (or Marlet Characteristic) opt as you selected on the Concer page. 0
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Subject 3: Project Overview and Scope of W	ocki)

Step 3 (continued) NOI Review

Reviewed blind as to Responder

Pre-screen project ideas

- Fit into CARD funding purpose
- Meet current CIP priorities
- Have appropriate timing

In the past, about half have typically passed An NOI which passes goes to full proposal



This top new for COMMERCEUSE ONLYS	Notice of interit to Propose (NOI) ## #
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Step 4 Full Proposal

Only those that pass NOI Narrative is key element

- Topic & objectives
- Scope of work, deliverables & timeline
- Project team
- Project impact

Project Budget





Step 5 Proposal Evaluation

Evaluation based on criteria in RFP

- Content
- Qualifications
- Impact(s)
- CIP Priorities
- Budget

Responders notified

No announcement of result





Steps 6 & Step 7

Step 6 Contracts Negotiated



State standard contract

No work on project can begin during negotiation

Step 7 Work Begins

Individual project once its contract is fully executed Press release after <u>all</u> contracts are fully executed





RFP Timeline – typically about 1 year



Project Timeline – typically 1 to 3 years



Agenda Item #3 1. CARD History & Background **2. CARD RFP Process 3. Creating Successful Proposals** 4. Questions & Answers 5. Input & Feedback



Commerce is Looking for...

- GOOD working understanding of MN CIP Applicability in MN to CIP
- Innovative technologies, approaches & strategies





Working Understanding of CIP

- **Role Commerce plays with utilities**
- **MN CIP program process**
- Types of utilities in State and their priorities
- Utility regulator requirements
- At minimum, no misunderstanding





Applicability to MN CIP

Results and deliverables geared to incorporation into utility CIP portfolios

Ideally some plan on how to directly transfer research into CIP program offering

Research related to the Technical Reference Manual (TRM)



Technologies and Approaches

Savings/applicability not yet documented

Savings/applicability documented but

- Climate differences
- Market barriers
- Other issues

Not in wide use in MN already

MN market potential

Reviews of secondary research





Commerce is NOT Looking for...

Proprietary product development

Technology or approach already well-documented

Targeted technology which has high penetration

Targeted technology for which a utility incentive is not required to move market

No or limited applicability to CIP





Some Things You Can Do

Review your evaluations from previous years

Review proposals & evaluations of others

Reviewing past proposals/evaluations

- 2013 and newer use <u>Commerce Actions</u> and <u>Regulatory Documents Search</u>
- 2012 and older, appointment with <u>Energy Contracts</u> staff



Review Proposals/Evaluations

Commerce Actions & Regulatory Documents Search

Select "Energy Request for Proposals"

	IINNESOTA DEPARTMEN				Tuesday, January 20, 2015 minnesota north star)		
<u>News Relea</u>	<u>ses</u> <u>Contact Us</u>						
Commerce	Banking & Finance	Energy	Insurance	Weights & Measures			
Welcome to CARDS - Commerce Actions and Regulatory Documents Search							
CARDS (Commerce Actions and Regulatory Documents Search) provides access to public information about Enforcement Actions taken by the Department of Commerce and a variety of other public regulatory documents. You will need Acrobat Reader or a similar application to read any documents you download. This is not a substitute for eDockets which is a separate tool shared by the Department of Commerce and the Public Utilities Commission. Pick your area of Interest Energy Request for Proposals							
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Other Things You Can Do

Leverage existing (or build new) relationships

- Partner with organizations/individuals
 - Understanding of CIP
 - Field research
 - Program implementation
 - Statistical analysis
 - Communication

Conduct preliminary assessments or literature reviews

Consider matching funds

Call or email me with questions





Some Things You Shouldn't Do

Once an RFP is posted, do not discuss with State program staff

- Specific funding topics in RFP
- Specific ideas or proposals in response to RFP

All the information should be in RFP

Contact Energy Contracts



Other Things You Shouldn't Do

- Expect CARD to fund long-term, ongoing support for programs or operations
- Use CARD project funding to promote specific proprietary product or service to utilities
- Seek project partners or utility support at last minute
- Ask utilities for matching funds





Agenda Item #4 1. CARD History & Background 2. CARD RFP Process **3. Creating Successful Proposals** 4. Questions & Answers 5. Input & Feedback



Questions & Answers

Please submit your questions via the chat box function if you have not already done so





Agenda Item #5 1. CARD History & Background **2. CARD RFP Process 3. Creating Successful Proposals** 4. Questions & Answers 5. Input & Feedback



Stakeholder Input & Feedback



We want to LISTEN to you and your ideas on how we are doing and how we might improve the CARD program and/or the RFP process

Areas of possible input

- Communication about CARD program
- CARD RFP process/timeline
- Dissemination of CARD project results
- Channels for your input
- Other comments on CARD program



Communication about CARD



How easy is it to find and access information on the CARD program?

Are there communication methods that you think are working particularly well?

Do you feel like you know who to contact when you have a question about the CARD program?



CARD RFP Process/Timeline

How is RFP process working,?



How easy is it to find out about RFPs?

How easy is it to find out about results of RFPs?

Are there things about the process that you think work particularly well?



Dissemination of CARD Results

How easy is it to find out about completed CARD project results?

What forms of disseminating information work best for you?

- Newsletter articles
- Websites (our or grantees)
- Final reports
- Webinars
- Conference presentations
- Directly from grantee

What forms are not working for you?



Channels for Stakeholder Input

LISTEN

Is annual CARD stakeholder webinar useful?

What additional formal channels of providing feedback would be helpful?

Would you take the time to fill out a survey regarding the CARD program if we sent one to you?



Other Feedback/Input on CARD





Recording of Webinar



CARD Program Webinar page of website



CARD Stakeholder Meeting Wrap-up & Closing

Mary Sue Lobenstein <u>marysue.lobenstein@state.mn.us</u> 651-539-1872



mn.gov/commerce/energy