

Slide 1 – Title Slide

E3 Virtual Roundtable

- Environmental Sustainability Resource Center (ESRC)

Slide 2 – Agenda

- Introductions
- Purpose and Goals
- Discussion
 - E3 Technical Assessments
 - Partner Engagement
 - Communications
 - Funding
 - Moving Forward
- Wrap-up and Next Steps

Slide 3 – Introductions

- Provide name and organization
- Identify if E3 project lead and project name
- 1. EPA Region 3
 - EPA Reps; NIST MEP Reps; Delaware; Pennsylvania; Virginia; West Virginia; Other?
- 2. EPA Region 4
 - EPA Reps; NIST MEP Reps; Alabama; Georgia; Kentucky; Mississippi; North Carolina; South Carolina; Other?
- 3. Other
 - EPA Reps; NIST MEP Reps; Anyone else?

Discussion Points:

Representatives introduced themselves from the following organizations:

- EPA Region 3
 - EPA Sustainability Coordinator
 - Pennsylvania
 - Small Business Development Center, Univ. of Pennsylvania
 - PennTAP, Penn State University
 - Pennsylvania Energy & Environment (PennTAP & SBDC)
 - Virginia
 - Manufacturing Industrial Technology Center (NIST MEP)
 - Virginia DEQ, Pollution Prevention
 - GenEdge Alliance
 - West Virginia
 - West Virginia MEP
 - West Virginia E3
- EPA Region 4
 - EPA Region 4 Pollution Prevention Program Manager
 - North Carolina
 - Waste Reduction Partners
 - E3 North Carolina, NC State University
 - South Carolina
 - South Carolina MEP Center
 - Duke Energy
 - Mississippi
 - Innovate MEP
 - Mississippi DEQ
 - Alabama
 - Alabama Technology Network (ATN)
 - Kentucky
 - Kentucky Pollution Prevention Center
 - Kentucky Excel Program, KDEP

- Kentucky Department of Energy Development
- Others
 - U.S. EPA Headquarters

Slide 4 – Purpose and Goals of Roundtable Discussion

- Promote communication among EPA Regions 3 and 4 E3 project stakeholders
- Develop engagement through structured discussion
- Identify relevant issues and needs common among stakeholders
- Progress E3 projects through additional assistance

Discussion Points:

- KPPC's experience as the E3 project lead for Kentucky and as the administrator for the Environmental Sustainability Resource Center (ESRC), a P2Rx information center, revealed that there was significant interest in E3 both in EPA Regions 3 and 4.
- Working with the EPA Region 3 and 4 P2 program managers and sustainability coordinator, the ESRC identified an opportunity to facilitate an E3 networking initiative among the states through dialog and information sharing.
- Each E3 project is unique and relies on various resources and partners. So why not put our collective heads together to share successes and understand what is going on nationally with E3 efforts?
- Important to get buy-in from both local partners that have a lot of the resources for E3 as well as the six federal organizations that have signed up to work together toward these practical solutions.
- This will be the first of a series of webinars that we plan to conduct this next year to help address some of the issues that we talk about today.
- This is not an effort to impose a prescriptive approach to E3 but to leverage the various implementation strategies and share what is working across the different projects to enhance success.

Slide 5 – Discussion Outline

- E3 Technical Assessments
- Partner Engagement
- Communications
- Funding
- Moving Forward

Discussion Points:

- Share the collective knowledge on E3 through our discussion today based on the topic outline.

Slide 6 – E3 Technical Assessments

- What is incorporated into an E3 technical assessment?
 - Always
 1. Energy assessment
 2. Environmental assessment
 3. Lean review

Slide 7 – E3 Technical Assessments (continued)

- Histogram showing questionnaire results where:
 - Always
 - Energy assessment = 100 percent
 - Environmental assessment = 100 percent
 - Greenhouse gas evaluation = 60 percent
 - Lean review = 80%
 - Other = 60%
 - Sometimes
 - Greenhouse gas evaluation = 25%
 - Lean review = 25%
 - Never
 - Greenhouse gas evaluation = 25%

Discussion Points:

- Surprising category that presented in the questionnaire results was the greenhouse gas evaluation. It seems like a simple step to extend energy assessment effort to determine a GHG evaluation.
- Value stream mapping was found to be critical to a successful E3 technical assessment. Helped with training and throughout the entire E3 process.
- Depending on the size of the client, typically smaller operations, two days for the on-site assessment is adequate. Because time is limited it can be difficult to develop a good value stream map and utilize the other assessment tools that need to be used.
- Use a twelve step lean assessment tool.

Slide 8 – E3 Technical Assessments – Other Considerations

- Identifying funding opportunities for project implementation, assistance and applying for loans/grants
- Safety and health as a business assessment
- Regulatory compliance

Discussion Points:

- Workforce development is key to help with developing the green skills that could be critical to moving E3 forward.
- West Virginia also does safety and health reviews. Do not do full safety and health as part of E3 as that is something that is done under industrial hygiene effort.

Slide 9 – Partner Engagement

- Who are the partners for the E3 project and what is their level of engagement?
 - Routinely involved (top 3):
 - NIST – Manufacturing Extension Partnership
 - Local utilities
 - Regional/Local community colleges
 - Other (comments):
 - Regional councils of government
 - Shale industry partners

Discussion Points:

- Shale industry partners – working with some of the small manufacturers in the shale energy supply chain. Have reached out to the Marcellus Shale Coalition and the Pennsylvania Independent Oil and Gas Association (PIOGA), two of the larger industry groups, to make them aware of the E3 project, to feed manufacturers that they know about to our project and hopefully at some point look to them to provide some resources to help us move toward implementation and connect us to other resources within their coalition.
- Can use industry organizations to help market our E3 services.

Slide 10 – Partner Engagement (continued)

- Who are the partners for the E3 project and what is their level of engagement?
 - Routinely and occasionally involved:
 - University and state agency based P2 TAPs
 - U.S. DOE industrial assessment centers (IACs)
 - State energy agency/office
 - Regional/local small business development centers
 - State economic development agency
 - Regional/local economic development offices
 - Universities

Slide 11 – Project Partners – Additional Comments

- “Project partners are utilized as needed.”
- “Partners are critical... We use partners to provide technical assistance, connect us to the clients and provide follow-up support to implement projects.”
- “Electric utilities have been supportive, as has IACs. We are just getting serious about full-blown implementation assistance.”

Slide 12 – Communications

- How often does the E3 partnership communicate to deliver the E3 project and services?
 - As needed:
 1. Partner Email distribution list
 2. In-person meetings
 3. Conference calls

Slide 13 – Communications – continued

- Histogram showing questionnaire results where:
 - 'As needed' results
 - In-person meetings = 60%
 - Conference calls = 60%
 - Partner Email distribution = 80%
 - Website = 25%
 - Other = 15%

Discussion Points:

- Using social media with FaceBook pages and LinkedIn groups
 - LinkedIn provides a casual way to update E3 partners as opposed to formal email communications. Provides a more professional social media environment.
- From the standpoint of state and regional committees we may participate in it will depend on how active the assessment picture is as to what the frequency and format for communications will need to be. So you get this “as needed” response depending on how many irons are in the fire to make sure that the partners are coordinating.
- Want to make sure that the funnels are full and healthy in terms of the clients we are trying to serve.
- When the steering committees meet, either monthly or quarterly by phone, it helps continue to keep the group focused on 1) the need to approach customers to market; 2) on what we are doing; 3) to make sure that we are continuing to engage new customers; and 4) to identify new venues to make presentations to get a healthy flow of new customers into the funnel.
- Important to be an annual face-to-face meeting of the state teams to evaluate where E3 is going and to address strategy to make sure that there is funding and are addressing the objectives.
- The vetting of the clients to ensure commitment and follow through to improve success.
- There are other things that can be done to get the E3 community more engaged and to speak with one voice to manufacturers.

Slide 14 – Funding

- How is the E3 project funded?
 1. U.S. EPA = 80%
 2. U.S. Department of Commerce = 20%
 3. Fee-based = 10%
 4. Other = 10%
- Fee-based for lean services where energy and environmental assessments are grant subsidized
- Other funding = foundation, ARC and the Virginia Tobacco Commission

Discussion Points:

- Virginia Tobacco Commission – focused on economic development in the tobacco region of Virginia. They make available funding for special projects of which has been utilized for two E3 pilot projects. Will also use for a third pilot scheduled for the fall.
- Mississippi Department of Environmental Quality (MDEQ) has provided funding for the initial pilot in Mississippi.
- EPA June 5th funding call. Shared some other resources to look into. Go to the <http://e3.gov> page on the webinars. Will post the presentation slides for this call with resource links.
 - The message was that EPA is doing a lot of preliminary work on getting the funding going.

Slide 15 – Moving Forward

1. Funding
 - Establishing fee-based services
 - Identifying foundation/private funding opportunities
2. Marketing
 - Reaching potential clients
3. Partnership Development
 - Identifying new partners

Slide 16 – Moving Forward – continued

- What are the most pressing issues for moving your E3 project forward?
 - Histogram showing ranked questionnaire results as follows:
 1. Funding
 2. Marketing
 3. Partnership development
 4. Technical skills development
 5. Other

Discussion Points:

- It is difficult to fill the funnel with prospective E3 clients if there is not sustainable funding to rely on. If initiatives operating on one year of funding attempting to do two to four assessments, it is hard to keep loading up and staying out there with a consistent presence.
- Start looking to the partnership base to see if there are funding opportunities they can make available.
- Working on compiling an integrated assessment report that EPA is interested in.
 - Are you including workforce development concepts?
 - Are you working in the loans and grants?
 - Are you integrating energy considerations on how it may affect pollution prevention?
- West Virginia – when an E3 assessment is conducted at a small manufacturer the MEP does all aspects of the assessment (energy assessment, lean review, environmental assessment, and the carbon footprint when appropriate). Can easily integrate all of the recommendations and how it all ties together. Energy stream mapping using a lean review approach and tie in production to energy savings.
 - Larger reports bring in the IAC to do the energy assessment report while the lean and environmental are done by the MEP and then submit the two reports together.
 - The most difficult aspects have been following up or making recommendations for funding.
- North Carolina – technical delivery model is different as is with many other states. Manufacturers receive five different assessments that yield five different reports.
 - E3 program manager compresses all five reports into one ten page executive summary like

report.

- The executive summary report is shared with the community partners (economic development, workforce development, local community colleges, and the NC Department of Commerce) as to source what funds are available for implementation, further training or what grant and loans are accessible and include that in the executive summary to be presented to the manufacturer as a unified team document. Provides seamless access to all of the different parts – the technical as well as those community implementation resources all at one time.
- Do what we can to provide a seamless service.
- It takes a lot of effort up front to make sure that the different partners understand that they are apart of an E3 team. It gets back to the communication piece that their process is to review the reports mutually and that they are not operating in isolation. That they realize they are part of a bigger operation to realize that there are opportunities for synergy but also the effect one report may have on the optimization of a recommendation in another report and considers the other elements of the business that is being evaluated in the other assessments.
- Make sure partners are trained up in a bigger effort.
- Do relationship development on the front end as well as the back-end to yield good implementation rates as well as to get partners to lead the effort to the right clients.
 - Partners can have trusted relationships that can be leveraged for this.
- How get companies to implement recommendations and move forward?
 - Monthly calls with the client with technical staff in on the call.
 - On utility side where there are energy efficiency incentive programs in place, there should be for a large customer or business an account manager or marketing representative that would be able to assist in helping to motivate customers to move forward with implementation of high value projects.
 - Smaller organizations need to be very quickly engaged, within a week or two of the report out, with trade allies (engineering, lighting, HVAC or other expertise) or partners that can get them active with projects identified in the findings. Keep it moving with the client and get them thinking about budgeting or it will collect dust and get buried pretty quickly.

Slide 17 – Wrap-up and Next Steps

- ESRConline.org
 - Questionnaire results
 - Copy of slides
 - Session recording
 - Written summary
- Continue Communications
- Future Roundtables/Webinars

Discussion Points:

- Would like to work with the states to assemble an E3 projects contacts list for the project leads.
- Where do we want to go?
- Broad topics as a start to narrow conversation down.
- What types of things do you need to help your project teams?
- E3 showcase to profile different projects?
- Create an E3 page on the ESRC web site and will notify when that is posted.
- Clinton Global Initiative – session on E3
 - Area of interest – how to help SMEs growing their exports
 - Is there a way to help with exports through the E3 process?
- West Virginia – MEP teach companies how to develop export plans.