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Shane Hamstra, TechWerx

Welcome, everyone! Good afternoon, or good morning, depending on where you're joining from today. Greatly appreciate you being here. Just a few quick logistical announcements before we begin today's webinar. For today, the chat is disabled, and we encourage you to use the Q&A to submit your questions. And also, if you need any technical assistance on Zoom, that Q&A button should be available on your Zoom toolbar. However, if you don't see it, there might be a more option menu on your toolbar, and inside there, the Q&A should be available for you. You can submit your questions or needs at any time, and we'll be collecting those and moderating those for a Q&A at the end of today's presentation. We hope you can stay for the full duration of today's event, but we are recording as well. So, without further ado, I'll happily hand things over to our moderator to begin today's webinar. Thank you.

Adam Klich, TechWerx

Thank you, Shane. Good afternoon, everyone. We're very excited to host this informational webinar for the Building Solar Understanding and Risk Education, or B-SURE for short, opportunity. This is an opportunity funded by the Office of Critical Minerals and Energy Innovation at the Department of Energy, and I'm Adam Klitsch, I'm your main host today, and I'm the lead for TechWerx.

Just a couple of housekeeping items before we jump in. Again, as Shane mentioned, please use the Q&A section to post any questions. You do have the ability to upvote the questions that you see there, and once we get to the Q&A section, we're going to be addressing them from most upvoted to the least, and we'll try to get through as many as we can. But if there are questions that we're not able to get to today, we're still going to capture them and address them over the next few days, and all of the questions and answers will be posted in our FAQ on the opportunity page. We do not allow artificial intelligence bots in the meeting for DOE requirements. You shouldn't need it. Again, this webinar is recorded. The transcripts, the presentation materials, the Q&As will all be posted on the website, so you'll have access to those in the next few days.

Quick agenda for today. We're going through the introductions right now, and then we're going to have DOE come in and describe the opportunity a little bit more in depth, go through the application process. And at the end, we'll have time for the Q&A. And we already covered, but if you have any questions, use the Q&A function if you have technical issues or questions about the content.

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All right, so TechWerx, if you're not familiar with us, we are an innovation hub that's designed to facilitate connections between Department of Energy, academia, non-profits, startups, and other innovators across the U.S. The hub is managed by RTI International. We're an independent research institute based in the Research Triangle Park in North Carolina. TechWerx offers many opportunities. We cover different topic areas. Be sure being one of our active opportunities right now, so we recommend you to follow us on social media, so LinkedIn, and sign up to our newsletter on the website as well, techwerx.org. That way, you're going to get notified, as new opportunities get posted, as soon as they're announced.

Now I'd like to introduce you to the, our DOE partner team, with the Office of Critical Minerals and Energy Innovation. Stacy Miller, Casey Hirsch, and Andrew Graves. They're going to get to the more interesting part of the webinar now, which is going over the opportunity, the application, and then we'll get to the moderated Q&A at the end. So I'm going to pass over to Stacy now.

Stacy Miller, DOE CMEI

Thank you, Adam, and hello, everyone. It's a pleasure to join you to discuss B-SURE. I'm Stacy Miller, and I'm joined by my colleagues, as Adam mentioned, Casey and Andrew. I'm a contract employee with DOE. We are formerly with the Energy Efficiency and Renewable Energy Office, which is now part of the Office of Critical Minerals and Energy Innovation, or CMEI.

So, CMEI's mission includes accelerating next-generation energy technologies to strengthen our nation's energy security. We do this through conducting R&D, creating initiatives to enhance energy security, and by offering funding opportunities to identify partners that support our mission.

So, the purpose behind B-SURE is to provide consumers with the knowledge that they need to make informed decisions about rooftop solar. And, in the next slide, you'll see that on August 7th, 2024, there were 3 federal agencies who issued consumer advisories in coordination with DOE and the Solar Energy Industries Association, where they offer guidance to consumers who are considering powering their homes with solar about how to protect themselves. So, while we recognize that most solar companies are reputable, there are some bad actors, and just, it's a complex topic, so we want consumers to be informed. So, we'll be building on this initial effort to reach people through partnerships with trusted consumer protection organizations.

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The purpose of B-SURE is to really help consumer protection, consumer education, and consumer-facing service organizations design and deliver education and training on solar energy for consumers and the professionals who support them. Our objective is to work with trusted consumer protection organizations to address challenges that consumers face by enabling them to better support stakeholders and to confidently interact with the solar industry from initial inquiry all the way through operation and maintenance and eventual decommissioning.

This is a \$3 million program. We anticipate making between 5 and 8 awards of approximately \$250,000 to \$750,000 each. A couple of additional notes. This program is designed to support two-year projects. There's no cost share requirement for the program. And the program is intended to focus on rooftop solar, benefiting both residential and small business consumers. So, consumer protection organizations are welcome to partner with others who can support them with these goals, though this is not a requirement.

Performers will be responsible for delivering testing, developing, testing, and delivering solar energy training and education to their intended audience. So you'll work with CMEI and other rooftop solar experts, including the National Lab of the Rockies, throughout the process, just to ensure the content is accurate, supported by credible sources, and representative of the current market conditions. Applicants are encouraged to design training that's interactive and engaging. You can consider activities like stakeholder interviews, focus groups, advisory committees, and other methods to solicit input in the development of your training and education programs.

And then a note that the National Lab of the Rockies will support awardees with activities like assisting in the development of educational approaches and materials, drafting and providing feedback on language for consumer protection and disclosure requirements, and helping translate lessons learned into scalable best practices, so you won't be alone in this effort.

So the content of the training and education program should focus on consumers' greatest challenges when navigating the entire rooftop solar cycle life cycle – from pre-purchase through decommissioning. And in the pre-purchase phase, of course, consumers could benefit from support with decisions about owning and financing solar, just helping them understand how an investment will impact their energy bills, how long it might take to recover their costs. Applicants could also choose to address solar leasing, if you choose. It's an arrangement where the solar company owns and maintains the system on the roof, which is allowed in many states, and may become more common as there are federal tax

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incentives available for leased systems. Then there's the installation phase. It includes things like permitting, interconnection, and commissioning the system. Post-installation - consumers may need help accessing available incentives, options to address underperformance could be helpful, and help with warranty claims. And then finally, you know, what do you do once the system has reached the end of its useful life? How can you get help getting that removed? So just a quick note here that in recent years, most solar consumers are evaluating the option of adding battery storage to their solar energy systems, and this is something that applicants may choose to include in your planned education, though it is not a requirement.

And then next, we'll talk about eligibility. So, to be eligible, the applicant must qualify as a domestic entity. Applicants must certify that they're not owned by, controlled by, or subject to the jurisdiction or direction of a government of a country at risk. The applicant must demonstrate established relationships with the target audience. And finally, the applicant demonstrates expertise in consumer protections as appropriate for the target audience and other stakeholders. Before submitting, you must certify with a checkbox that you meet the eligibility criteria. And finally, just a note that DOE is really seeking to work with organizations familiar with consumer protection or advocacy. Solar industry-related organizations and others are welcome to participate as subcontractors, collaborators, or advisors who can support your application.

Next, we'll talk about program goals and policy factors. CMEI will consider the following program goals and policy factors when reviewing applications to select those that are most impactful and aligning with our national priorities. So these include... the proposed project advancing key DOE energy goals related to consumer protection in the rooftop solar market, the proposed project demonstrating potential for significant impact and the ability to replicate in other regions, the proposed project contributes to the geographic diversity of selected performers, and finally, the proposal leverages existing resources, initiatives, and expertise to maximize the impact of your project. Stacy Miller, DOE: And note here again that DOE and NLR will help all performers with this last bulleted goal when it comes to the existing body of federally funded consumer resources for solar, but we also want to leverage your existing relationships and initiatives where solar education may complement your efforts, too.

And next, in terms of review criteria. Applications are evaluated based on these four criteria, and you can see the various weights assigned. And these are all covered in the first 3 pages of the project narrative template. So, for the project lead qualifications, this refers to both the organizations and their key contributors for the project. You can offer examples

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of how your organization has engaged in other consumer education initiatives previously. And there will be a single PDF file of resumes for each key personnel who's contributing to your project, and this does not count against the two-page limit for describing your qualifications. It'll be attached separately. Then, for target audience, there's also a two-page limit to describe that target audience, who's going to receive the education for navigating solar energy opportunities for rooftop solar, specifically. And I note that we invite applicants to work with consumers directly, or you can partner with organizations who are committing to provide solar consumer protection education to the stakeholders that they already serve. We also asked for an estimate of the number of consumers the partnership anticipates reaching in the application. The third one, engagement and education strategy. We'd like that to be customized for your target audience, and in 3 pages. You can outline your planned activities and expected outcomes, and ideally, that plan is replicable and could be applied elsewhere, because we like to transfer these lessons, and the approaches that you use and replicate them elsewhere to add value. At least one in-person meeting will be required, and it can be part of a larger conference, or different training if you prefer. Doesn't have to be a standalone event. And then finally, outreach strategy and potential impact. So, in two pages, you'll outline your strategy for delivering information and resources to the target audience. You can include activities like training, development of multimedia, resources for consumers. You can host events and town halls, workshops, solar home tours, and site visits, or anything that you might bring to the table in terms of your own ideas. Proposals should ideally, again, be replicable and scalable with regional and national impact. And we're also interested in plans for the project's longevity after the period of performance.

And next, we have the timeline. So this application, opened on the 10th of March, and you're part of the March 25th info webinar today. We'll also hold two separate office hours in April, where you can ask TechWerx and DOE questions live. Applications will be accepted through May 13th at 5 p.m. Eastern, and we anticipate agreements being executed in September this year. I note that there is some leeway with the selection process, and that performers may begin work as soon as the agreements are finalized with TechWerx. This is designed as a two-year program, and anticipated to be complete in the fall of 2028.

So we're going to talk a little bit about submitting the application itself, and on the next slide, you'll see the materials. So there will be an online application form and that'll include two uploads that are required, the first being the project narrative. And the template has instructions and prompts, for this project narrative. It'll make up the bulk of your

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application package. There's a 10-page limit, including the cover page, so we've tried to, really scope this down, in terms of just including the substance of your proposal and then a resume file will be required as well. And those can be two pages each in one PDF, two pages for each performer and contributor on your project, combined in one file and submitted. Letters of support are optional, but you can upload those as well if you like.

You'll see online that there are prompts about how to upload the project narrative and the resume file. You can submit any time through May 13th at 5 Eastern, and note that your work is saved as you go. There's a save progress box at the bottom of the page, and also the work is saved automatically every 60 seconds.

Here's a sample screenshot from the online application. Just some of the things that you'll need. The applicant's information, such as your organization name, website address, and your lead points of contact. The universal ID is required, but we've made the NAICS code optional. Proposed partner organization names, if you choose to work with partners, and the number of potential consumers you expect to reach. Again, we're hoping for a little broader than local reach, going to regional or national. And finally, the list of names of the partners you're working with who are familiar with solar, and these could be an individual expert or an organization. It's also optional, because we'll be providing solar expertise. Note that if you have multiple partners, just simply separate them with a comma in the partners field.

On the next slide, you'll see a sample screenshot from another portion of the application. We need to know the total funding that you're requesting. This is where you'll upload the project narrative, the resumes, and some of the eligibility certifications. In the certification agreement section, that's where you must read and agree by clicking the box before you're able to submit. Note that this list on the last two slides is a sample, and it's not 100% complete. But you'll be welcome to check in with us during office hours if you have questions, or submit them by email in between, if you like.

And then on the next slide, just wanting to thank you for joining this info webinar, and noting that the frequently asked questions will be updated, as mentioned before. Send your questions. My colleagues and I are now available for Q&A as well. Andrew will be taking the lead on that for at DOE. Thank you.

Adam Klich, TechWerx

Great, thank you, Stacy. It looks like we have a few questions in the queue already. Again, please use the Q&A function if you do want to submit a question or upvote a question and

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we'll just go down the list here. So the first question from Andrew. We'll probably get to this, but just in case, this grant opportunity is designed to provide consumers with knowledge to go solar while avoiding bad actors and scams.

Question: Do consumers include all potential solar owners, from residential to business and farm to institutions, like local governments, nonprofits, and others, or is it largely focused on the residential or small business audience?

Andrew Graves, DOE CMEI

Yeah, thanks for that question. I think you'll notice that a lot of the program seems to be written in a way that focuses on the residential and rooftop solar market. So that was our sort of primary focus, but I think we would be interested in also receiving applications that went broader than that to the sort of small commercial, sector, particularly for things like local governments or nonprofits or, other sort of community-based, commercial structures, like churches, or YMCAs, you know, that sort of thing. I would probably draw a line, away from the utility-scale sector. We're not as interested in that larger space, but I think we'd be interested in receiving applications, from the small commercial sector as well.

Adam Klich, TechWerx

Great. Thank you, Andrew. Great, so now the next question from Ryan. Is there a preference for multi-state applicants in this opportunity, or are applications with a more narrow geographic focus of interest as well?

Andrew Graves, DOE CMEI

Yeah, thank you for that question. I think in general we're looking to have as big of an impact on the sector as we can in terms of advancing these objectives. So, applications that have a sort of broader reach will be valued. I think Stacy mentioned one of the questions is about the target audience and the reach, the number of consumers you expect to reach through your proposed program. So, yeah, I certainly think there would be a favorability towards multi-state applications, but we'll certainly accept applications, that have a narrower focus as well, and if we can make a compelling case for, you know, a particular region of the country, or, you know, a larger population center, or a larger sort of swath of rural America, anything along those lines, we'd be interested to sort of see what kind of ideas are out there, for sure.

Adam Klich, TechWerx

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Thank you, Andrew. One more question from Ryan. Is DOE interested in applications from state or utility solar program implementers that currently play a solar consumer protection function as part of their program administration, or only from lead applicants that are dedicated consumer protection organizations?

Andrew Graves, DOE CMEI

I think that's a really good question. We have framed this, primarily in terms of consumer protection organizations. We've also talked about state government, attorney general's offices that may be involved in consumer protections. I don't think we had really thought about utility solar program implementers, and that sort of role but that's a really interesting suggestion, so I think we would be open to reviewing applications, that had that focus. We may have to double-check with our legal counsel and provide clarification in the Q&A that will be posted as a follow-up to this but that's a really interesting idea, and I think ideas like that are part of the benefit of doing these webinars, to get some feedback for new ideas, so that's great. Thank you.

Adam Klich, TechWerx

Okay, next question. DOE political leadership has recently promoted messaging that frames solar as expensive and harmful to grid reliability. In the context, can DOE clarify whether educational materials developed under the program will be independently created by ORDs or directed by DOE? And how can we as consumer protection entities ensure that consumer protection messaging remains objective and not shaped by broader policy shifts regarding solar deployment?

Andrew Graves, DOE CMEI

That's a very good question as well. The plan is to allow these selected entities to develop, educational material, and messaging as they see fit, based on what's in their application. As Stacy mentioned, we are planning to pair awarded programs with our experts from our national labs, so they will provide technical inputs and expertise from the national labs to sort of work with you on the messaging and the educational material that's developed.

Adam Klich, TechWerx

Thanks, Andrew. Okay, next question. When you mention potential partners, does that include solar installers, or are you primarily focused on other types of organizations?

Andrew Graves, DOE CMEI

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I don't think the solar installers would be, you know, an entity that we would think of as a prime applicant. We'd really be looking for the sort of objective, non-biased, perspective of a consumer protection organization, a related entity. That said if a nonprofit organization, that had a focus in consumer protections, had a number of solar installers as partners, or sort of had a collaborative or some sort of stakeholder group that was advising them as a part of the program, that might be something of interest.

Adam Klich, TechWerx

And just to add again, I think what Stacy had covered during the presentation, you don't need to have the solar expertise that will be provided by the National Lab of the Rockies and DOE.

Okay, next question from Katie. We are a non-profit that runs a solar consumer protection program, but we are not a consumer protection organization. Would we still be eligible to apply, or only as a partner to a lead applicant?

Andrew Graves, DOE CMEI

Okay, yeah, I don't think we want to provide specific feedback on eligibility based on short explanations of types of entities, but in general, we are looking for, nonprofits with a consumer protection focus. I think if the organization is going to be really perceived as a solar advocacy organization, or an organization that is primarily focused on advocating around solar consumer protections, it might be helpful for an organization like that to participate more as a subrecipient, or a partner to a lead organization that was more, sort of focused on consumer protections more broadly.

Adam Klich, TechWerx

Thanks, Andrew. I think the next question might be somewhat similar. Would a university be a good lead agency?

Andrew Graves, DOE CMEI

Yeah, similarly, you know, I don't think we're going to weigh in on what would be specifically eligible or good. I think we'll review most of the applications that we receive, or all the applications that are eligible that we receive. Our primary stakeholder that we would be looking to support would be a consumer protection-focused organization. But if there's some sort of a center at a university that's focused on consumer protections, or does that

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to a significant extent, and they can make a case for why they would be a good entity, you know, we'll review those applications.

Adam Klich, TechWerx

Thank you, Andrew. Is this opportunity specific to rooftop solar, or can it include community solar, consumer protection, and education as well?

Andrew Graves, DOE CMEI

Yeah, this is similar to what I had, said before. I think most of the opportunity is written with a focus on rooftop residential solar, but we would look at applications that come in with a broader focus. I mentioned sort of small commercial solar on, you know, local government or a library, or a church, or something like that. And I think community solar would also sort of fall in that category, that it's not the explicit focus of this opportunity, but I think we would review applications that come in on this and see if there was a compelling, case.

Adam Klich, TechWerx

Okay, next question. Would state energy offices or quasi-state agencies qualify as lead applicants?

Andrew Graves, DOE CMEI

Yeah, I mean, similar to, I think, how I've been answering. Most of these, I think we did think about state attorney general's offices that were focused on consumer protections being, of particular interest, but beyond that, state energy offices or quasi-state agencies. Similarly, I think if they can make a good case for, you know, their historic focus in consumer protections, and why they could use this opportunity, to, you know, achieve the objectives of this, program, I think we would, you know, review those applications.

Adam Klich, TechWerx

Adam Klich, TWX: Okay, I'm watching on the list. How can we identify partnership opportunities?

And I can start, and then... I don't know if you have any other inputs, Andrew, but I would suggest, depending on what you're looking for, again, if what you need is solar expertise input, that will be provided by DOE and the national labs. If maybe you're a solar organization, and you're looking for a consumer protection organization, I would look in your community to see who might be organizations that are doing that today, and then approach them and see if they would be interested in maybe kind of priming as a lead.

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Andrew or others, do you have any other recommendations on how they can identify partnership opportunities?

Andrew Graves, DOE CMEI

No, I think that makes sense, because maybe you can weigh in, Adam. Does TechWerx have any plan to make available the participant list or anything like that, of these sorts of calls, so people could see who else was interested in the call and might be interested in participating, or do you not share that information?

Adam Klich, TechWerx

We usually don't, but we can't send, we'll send a follow-up survey to everyone and ask for permission, if you're okay sharing your information, and for those who agree to, we'll be happy to follow up, and share, the attendee list, at that point. So that's a to-do for us, for those who agree to it.

Okay, we covered the questions that we had. We'll have a couple more minutes and see if maybe people have more questions that they'd like to add.

We're seeing consistent patterns in consumer confusion and misinformation through large volumes of direct consumer interactions. How is DOE thinking about incorporating real-time consumer-reported data into the design or evaluation of education interventions?

Andrew Graves, DOE CMEI

I mean, I think that's an excellent question, and that's exactly the type of thing that we're hoping proposals come to us with, solutions, and how to address. So I think, yeah, if you could come up with ideas for how to incorporate, sort of real-time consumer-reported data, and build that into your educational initiatives, that's what we're looking for you to come to us with ideas with but that's, really good to be sort of thinking about that.

Adam Klich, TechWerx

Give me one more chance to see if we have any more questions.

No more questions. As we close, reminder that the submission deadline for the opportunity is May 13th at 5 p.m ET. We do recommend you try to submit your application earlier, that will give you time in case you run into any technical issues that you may need our support with, or if there are any last-minute changes, so we recommend not waiting until the last, 15 minutes to do so.

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Again, as was covered earlier, we have office hours on April 8th and the 21st, 1st, from 3 to 4 p.m, which we hope you join if you have any more questions, and again the recording captured all of the Q&A today, and the recording, transcript, everything will be posted on our website. Before we jump, we do have one more question, since we have time.

Is this program inclusive of both ownership and PPA models?

Andrew Graves, DOE CMEI

Yes. I think, any educational materials that would address consumer protection concerns about the different ways that consumers could adopt solar. Obviously, you'd want to sort of orient that towards, the state or region, where you'd be focused, and, you know, what sorts of ownership models or PPAs are allowed but, yeah, I think both of those would be covered.

Adam Klich, TechWerx

Thank you.

Andrew Graves, DOE CMEI

Thank you for all the questions.

Adam Klich, TechWerx

I think we addressed all of them. If you do have questions that come up between now and the office hours, again, you can join the office hours, or feel free to send us an email at info at techwerx.org, and we'll address them accordingly, and all of the questions we receive, again, will be posted on the FAQ in the opportunity page, so kind of checking, you know, every few days is a good practice to see what's new there.

I think that concludes our webinar for today. Again, we suggest you follow us on LinkedIn or sign up for our newsletter on the website for any kind of news about future opportunities. And if you have any questions, reach out to us, but otherwise, we look forward to seeing your applications.

Stacy Miller, DOE CMEI

Thank you, everyone.

Adam Klich, TechWerx

Yeah, thank you.