

Transcript of DOE SWIFt Webinar Clearinghouse Presentation

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Good morning, everyone. As Ben mentioned, I'm Tara Johnson and I work with EPA's Water Infrastructure and Resiliency Finance Center. I manage the Water Finance Clearinghouse, EPA's one stop shop for all things water finance.

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The Water Infrastructure and Resiliency Finance Center was formed in January 2015. The Center focuses on financing sustainable and resilient drinking water, wastewater, and stormwater infrastructure. We provide innovative financing information and technical guidance to communities and stakeholders. Our responsibilities include advising, convening, and facilitating peer-to-peer learning opportunities and providing access to information to share community models of financial and partnership success.

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To find water infrastructure funding sources and finance resources, communities have been searching multiple websites, requiring an investment in time and personnel hours, when they need information on funding and financing options for water infrastructure projects. Small communities especially may not be able to commit the time and resources needed for a full search.

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So, EPA devised a solution to assist these communities: an online database to host funding and financing sources and resources from multiple sources that would be kept current both by EPA and a network of contributors. To best meet the users' needs, the database had to be searchable, so users would not be overwhelmed with information and could quickly and easily access the data they were searching for. The database also needed to have a modern look and feel so users would be confident that the information provided is current and complete.

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In response, EPA launched the Water Finance Clearinghouse in 2017. The Clearinghouse is an easy to use web-based portal to help communities to quickly locate information and resources when making decisions related to their water infrastructure needs.

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The Clearinghouse is actually two databases in one. On one side, we have information on funding and financing sources for water infrastructure projects. On the other, we provide resources that can be helpful to communities in their decision-making. The Clearinghouse was developed with multiple ways to search the data, including tailoring a search for resources or funding, by location, and even a few embedded quick searches along the bottom, such as for webinars and videos.

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We have a variety of information hosted on the Clearinghouse database. Under Water Finance Resources, we have webinars and videos as I mentioned before as well as reports, trainings, case studies, and more, all with a focus on water infrastructure financing. On the Water Funding Sources side of the database, we provide information on several different types of funding, including current federal and state funding as well as water infrastructure funding or financing offered from private or philanthropic companies.

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This slide outlines the various types of resources and funding sources available through the Clearinghouse. Each of these categories listed, such as events and state funding, are searchable filters on the Clearinghouse.

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This screencapture shows how the Clearinghouse looks when users want to search by geographic location. The map pictured is clickable, so users can select a particular state, but we also have a variety of options under this search feature. This allows users to find funding and resources not only open nationwide or tailored for their state, but also for tribes, US territories, as well as international options.

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To search our resources, we have a number of premade drop-down filters available. Users can automatically search by sector, scope, funding approaches, and more. Within the search results, the data will contain the resource title, which is a link to where to access the resource online, the author, a description, the type of resource such as case study or video, and the year the resource was produced.

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Within the provided premade drop-down filters, users can select multiple filters for their search. For example, if a joint drinking water and wastewater utility wanted to search resources for both sectors, the user could select both. This reduces the amount of searching and self-filtering results as users can use multiple filters at once. If, while searching, a user decides to remove a selected filter, all that they need do is click the X next to that filter. This way, users do not need to initiate an entirely new search.

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The Clearinghouse is set up to search funds in much the same way as searching resources. Premade filters for funds include source of funding, eligible uses, and eligible applicants. Search results will be listed with a link to the funding option online, the source, a description of the funding, and information on how to apply and the current funding level. In this example, the current funding level is blank as the drinking water state revolving fund, much like some other funding sources in the database, are recurring allotments with funding levels varying from state to state and year to year.

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We have several key features of our Clearinghouse database. After searching for resources or funding, users can export their search results to an Excel file which can be saved to their own computers. This file will result in a static capture of the information, but users have found this helpful when comparing and presenting different options to local decision-makers. Users can also search within search results, either by applying premade filters or entering their own search terms. Search results can be reorganized by data categories simply by clicking on the search results column header. This allows users to sort their results by source, year, sector, and more which may be more helpful to them than the default sort. The default sort is currently when the information was entered in the Clearinghouse with the latest information appearing at the top. Within the database, users can remove columns as needed, resulting in a customizable display for their search.

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As part of our Clearinghouse, we have two types of user accounts. Of course, anyone can access the website directly at www.epa.gov/wfc and peruse the information without creating an account. An account provides users with additional features, making future visits to the Clearinghouse easier and

even faster. General users are able to favorite resources and funding sources for quick access during each visit to the Clearinghouse as well as to subscribe for email updates on new additions or edits to their selected filter options. Contributors can do everything general users can plus suggesting edits to existing information, suggesting new resources or funding sources to the Clearinghouse, and requesting removal of resources or funding sources if they expire.

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To set-up a general user account, visit www.epa.gov/wfc and click “Create Account” in the upper right corner. The default selection is for a general user. Simply provide your email address and click “Submit Request”. The request is submitted to the Clearinghouse where the administration team reviews and approves the requests.

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In order for the Clearinghouse to be successful, we rely on a network of contributors. These contributors are individuals who represent organizations providing water infrastructure finance resources and/or managing funding and financing options for water infrastructure projects. Currently, the Clearinghouse has contributors from throughout EPA, from state and local agencies, and from associations supporting the water sector.

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To become a contributor, you follow the same initial steps as a general user. In the pop-up, you select “Contributor” and complete the form provided. The administration team again reviews and approves the requests. Once the contributor request is approved, a temporary password is provided for first log-in with the Clearinghouse. Contributors, unlike general users, will have ownership of their suggested content, which enables contributors to easily suggest edits. Contributors also have access to analytics of their data.

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Contributors have a dedicated portal to access the Clearinghouse. Though this screenshot is from the beta testing of the administrator portal, the look is much the same. The contributor portal provides all the features available to general users, such as searching the database, favoriting filters for quicker searches on future visits, and managing subscriptions and notifications. The contributor portal is also where contributors can add, edit, or delete their content as well as track their suggestions to the Clearinghouse.

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All users can also provide feedback, such as reporting a broken link or suggesting content or new funding sources, by clicking “Submit Feedback or Resource”. This takes users to an online form to be completed and which is then sent to the Clearinghouse administration team for review. It’s important to note, however, that use of the feedback feature does not provide ownership or the ability to edit suggested content.

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Since EPA launched the Water Finance Clearinghouse almost two years ago, we have had over fifty-nine thousand visits to the Clearinghouse. Currently, we have a network of 127 approved contributors and 243 general user accounts. As of Friday, the administration team has approved 879 suggestions from general users and contributors for inclusion in the Clearinghouse in addition to information added by the administration team itself. These are great numbers for our first two years!

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Now that the Clearinghouse is up and running, we are continuing to look at ways to best use this tool and meet our users' needs. Currently, we have a three faceted approach for future Clearinghouse improvements. These include the development of learning modules which I'll cover on the next slide, incorporating water finance data and analytics for investments made in the United States, and what we're calling Clearinghouse 2.0. The data in the Clearinghouse is not static and we do not expect our number of contributors, general users, funding sources, or resources to be static either. We continue to do outreach for the Clearinghouse, such as this webinar today, to encourage new users to utilize and provide information to the database as well as listening to feedback on how we can improve on the Clearinghouse for our users.

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The Clearinghouse Learning Modules are step-by-step water finance guides we are developing in partnership with programs throughout EPA's Office of Water. These in-depth guides provide users with a tutorial on a variety of funding and financing options to educate them and support their water infrastructure funding decision-making. In 2018, we launched the first two of these modules, one on the Water Infrastructure Finance and Innovation Act or WIFIA 101 and another on Financing Decentralized Wastewater Systems. This month, we plan to launch our third learning module on the drinking water and clean water state revolving funds. We have a number of potential topics identified for future learning modules, such as public-private partnerships, disaster recovery and resiliency financing, and stormwater financing.

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The easiest way to stay up-to-date on the Clearinghouse and other Water Infrastructure and Resiliency Finance Center activities is to sign-up for our mailing list. Visit the Center's website at www.epa.gov/waterfinancecenter. Depending on your screen and web browser, you may need to scroll down to find "Subscribe to Updates" on the right side of the page. Click "Subscribe to Updates" and provide your email address and your state or province. You can unsubscribe at any time. Instructions to unsubscribe are provided at the bottom of every mailing list email.

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Thank you for listening this morning and thank you to Ben for reaching out and scheduling this webinar. I hope this presentation has given you a good overview of the Clearinghouse which you can visit at www.epa.gov/wfc. My contact information is on the screen if you have any questions after the webinar. Thank you!