

Operations Technology Development

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Operations Technology Development (OTD)

- > OTD is a stand alone, 501c (6) not-for-profit, member-controlled company where gas utilities work together to develop technology solutions to common operations issues.
 - Membership dues based on number of customers
 - Each company votes own dollars to specific projects
 - All members have access to all project information
 - Established in 2003
- > 14 members (coast to coast)

Project Selection Process

> Step 1: Idea Generation

- Members provide concepts for high priority issues.
 - > Brainstorm sessions with member companies.
 - > Member visits and interaction.
- Projects transitioned from ongoing GTI programs (SMP, Research Collaboration, FERC).
- Performing organizations propose project ideas via members.

Project Selection Process

- > Step 2: Project Manager Develops a one to two page project brief.
 - Includes input from member sponsor(s).
 - Objective, value, concept, timeline & cost estimate.

- > Step 3: OTD disseminates 1 page project briefs to membership with a prioritization form.

Project Selection Process

- > Step 4: OTD members prioritize projects
 - Scale of one to five.
- > Step 5: OTD determines appropriate ‘cut-off’ based on available funds, membership scoring & special requests from members.
- > Step 6: Project Managers develop 4 page proposals with input from project sponsors.
 - Additional project details on SOW

Project Selection Process

- > Step 7: Four page proposals sent to members for review.
- > Step 8: Project Managers develop presentation based on 4 page proposal and member feedback.
- > Step 9: Project Managers present concept at annual allocation meeting.

Project Selection Process

- > Step 10: Members allocate funds to projects of highest interest using dynamic funding allocation (DFA) model.
 - Open forum.
 - DFA is open to all members – able to identify who is funding what and at what level.
 - Facilitation of consensus takes a number of weeks. Project status is determined by level of funding.

Project Selection Process

- > Step 11: Project Manager works with funders to develop detailed SOW, timeline and budget.
- > Step 12: Project Manager coordinates a project kick off meeting (conf call).
- > Step 13: Funders provide OTD with authorization to proceed with project.

Project Monitoring & Communications

- > Step 14: OTD initiates contract with performer.

- > Step 15: During project performance – Project Manager communicates frequently (monthly) with funders – formally via quarterly reports.
 - Budget
 - Timeline
 - Milestone progress

Project Monitoring & Communications

- > Step 16: Annual OTD meeting where the status of all projects are presented to all OTD members.
 - SOW, budget, timeline, milestones and next step discussed.
 - Also serves as technology transfer for OTD members that are not funding a specific project.

Deployment & Commercialization

- > Step 17: Deployment & Technology Transfer
 - Project Manager with OTD's approval publishes papers and speaks at industry conferences to build awareness and develop market pull for product.
 - Lab and field demonstrations performed at OTD member companies as outlined in SOW.

Deployment and Commercialization

> Step 18: Commercialization

- Commercializers are attracted to OTD projects because of membership demographics.
- Timing and involvement of commercializer varies by project.
 - > Determined by Project Manager and OTD funders.
 - > Involve commercializer at earliest reasonable stage in process.
 - > RFP process utilized where appropriate.
- OTD retains IP and obtains licensing fees whenever possible and/or appropriate.

Summary

- > OTD is a stand alone, not-for profit company.
- > Projects are selected and overseen by a Project Manager and OTD members.
- > Facilitates collaboration between utilities and R&D performers.
- > Enables funding and oversight of technology development to solve common issues.