

2026-03-05 iCRS-T Informational Webinar Transcript

Christi Pezzone

Good afternoon, everyone, again, and welcome to our informational webinar for the Interconnection Cost Reduction Solutions for Transmission, or iCRS-T Opportunity. My name is Christi Pezzone. I am the Deputy Director here at ENERGYWERX.

We have a couple of notes. We will not be allowing AI bots, as you can see on your screen, they will be removed if they are let in or they will not be allowed in from the lobby.

Next slide please.

This is an information session. There will be time to address some questions after a briefing from the program office on iCRS-T. You can see the Slido information on the screen. You can either use the QR code or go to slido.com and enter iCRSTOSS, and that will take you to our Slido instance. If you can, you're welcome to submit questions there. You can also see questions that others have asked and use the upvote option to move those up in ranking so they'll be answered first. Once DOE has had time to review the Q&A, we will post it to our website in about a week. We will be posting a recording of the webinar today and the transcript probably by tomorrow morning, so you can keep an eye out for it on our website that is linked in the chat.

I wanted to go over a couple of upcoming key dates. The next Informational Webinar is scheduled for [March 17th, 2026 at 3:00 PM Eastern Time](#). This Informational Webinar will be another opportunity to ask questions. As a reminder, [applications](#) close on Thursday, April 2nd at 3:00 PM Eastern Time. If you are having any application issues, please reach out to info@energyworks.org.

Moving on to the overview portion of the webinar, I'll be turning it over to Spencer Doyle from the Interconnection Innovation Exchange Program.

Spencer Doyle

Great, thanks Christi. Hello everybody. Good afternoon. My name is Spencer Doyle. I'm a technology advisor with i2X at the DOE and I'll quickly have my other DOE colleagues introduce themselves as well.

Andrew Torma

I'm Andrew Torma, also a technology advisor and i2X with Interconnection Innovation Exchange at the DOE.

Ammar Qusaibaty

Hi, everyone. I'm Ammar Qusaibaty, Technology Advisor, i2X at DOE.

Spencer Doyle

Lovely. Thank you for joining the webinar. Today we will be talking about the Interconnection Cost Reduction Solutions for Transmission Opportunity.

Next slide please.

Great. So a quick look at our agenda for today. I'll speak quickly to an overview of the i2X program. We'll then get right into the main star of today, the iCRS-T funding opportunity. We will talk about an overview of the program, eligibility requirements, what the application materials look like, our review and selection criteria, and finally anticipated timeline and then we will wrap up with a nice large Q&A session where you can put in any questions that weren't answered for you during the webinar.

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OK, so the Interconnection Innovation Exchange is a program in the DOE that is led by the Integrated Energy Systems Office and collaborates with offices across the Department of Energy, and our mission is to enable simple, fast and affordable interconnection while enhancing the reliability and security of our electric grid.

In the name of that mission, we have 4 primary focus pillars, if you will.

The first one is, we work with stakeholders and researchers to identify strategic solutions to address current challenges in both the transmission and distribution interconnection world.

Second, we engage with stakeholders to identify interconnection barriers, share best practices with the industry and lessons learned, and test innovative solutions to address specific interconnection challenges.

We also work with our national labs to lead data collection efforts and perform in-depth analysis that provides baseline information to set interconnection metrics, track progress and identify successful strategies.

And finally, we help support research and innovation, for example, through opportunities like this one that you're all here to learn about today.

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So, here's just a quick overview of some of the members of the i2X team. The program is supported by several offices across the DOE. As I said, it is led by the IESO, Integrated Energy Systems Office. We collaborate with the Office of Electricity, Office of Cybersecurity, Energy Security, and Emergency Response, and so on. And we also partner and work very closely with several national labs, as you can see on the bottom left.

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Here we have a quick highlight of some of our recent activities from last year. Starting in the top left, we've helped put together more than 60 real world solutions through stakeholder engagement and research with our national labs, targeting transmission and distribution interconnection, and we've centered those solutions around four goals of increasing data access and transparency, helping improve processes and timings, promoting economic efficiency and interconnection, and of course, efforts to maintain reliable, resilient, and secure grid.

On the data and analytics side, we've worked with our national labs, primarily Lawrence Berkley National Lab, to create reports. For example, our 2025 Queued Up report that focuses on bulk power system interconnection timelines.

For stakeholder engagement, we've got all kinds of things going on. It seems like all the time. One that I'll highlight is we have launched i2X Connect, which is a social media platform for interconnection stakeholders to meet and discuss problems that they're facing, solutions that they have attempted to implement, what they're working on, and just a place for the industry to mingle and collaborate. If you're not already a member, I strongly encourage you to [take a link here](#) to the platform and join some of those conversations.

On the research and innovation side, we've got a nice number of things going on. We're currently supporting 5 utility projects, for example, through the Innovative Queue Management Solutions funding opportunity which is testing queue management improvements with Sandia. And we've helped organize some training boot camps for EMT modeling methods with Oak Ridge National Lab.

The next slide, please.

OK. So that's the i2X program. Hopefully we can understand how this iCRS-T Opportunity fits nicely into that program. Interconnection Cost Reduction Solutions for Transmission, or iCRS-T, is a Voucher Program that will fund experts in bulk electric power system modeling and innovative transmission techniques, that's the Voucher Provider, so hopefully those of you on the call, to provide services to transmission Providers, AKA the Voucher Recipients. We have total funding for the program of \$4 million. We'll get into more details on funding in a moment.

If you look at on the right side of the screen, you see a screenshot of the [Opportunity Page](#), where you can read about the description and application materials, essentially higher detailed everything we're going to discuss today. You can also [follow a link](#) to the actual application where you can apply online, and you can scan that QR code to be brought to that Opportunity Page, or you can [follow the link](#) that was sent in the chat.

Thanks Julia.

Next slide please.

So what are the focuses and goals of the iCRS-T Opportunity? Starting with who we're funding, we will be funding applicants that are US based public or private companies, nonprofit organizations or academic institutions. Those applicants will need to have one or more advanced electric system modeling capabilities that are directly relevant to the US bulk power system.

Just as a quick note on the "who to fund", this Opportunity is not able to fund national labs or FFRDC's at this time.

Those Providers will be, you know, applying for Vouchers. We'll get them some details of the Voucher Program in a few slides here, but for an overview, the expected maximum Voucher value will be up to \$250,000 of work. The Vouchers will be distributed as in kind support, meaning that ENERGYWERX will directly reimburse the Voucher Provider for the work that they have completed on behalf of the Voucher Recipients.

And so, what is it that we're funding with these Vouchers? Only work related to providing services that will result in interconnection cost reductions will be eligible to receive a Voucher under this Opportunity, and some eligible services include advanced modeling and studies, interconnection, modeling, standards development and education and training. Those are three broad categories and we'll speak to some more specific examples in a moment.

Next slide please.

So, what does this look like in practice? We are expecting to make about 16 to 30 matches between Voucher Providers and Recipients and the funding level for each of those matches will be between \$50,000 and \$250,000. These projects should be completed within two years, so we are supporting projects for up to two year timelines as a part of the project.

For the capability we will be requiring 4 milestones.

Milestone one, which will be due prior to starting work, is a memorandum verifying

that all requisite agreements, so for example non-disclosure agreements, CRADAs, or site access paperwork between the Voucher Provider and the Recipients, are completed and signed by both parties.

Milestone two, also prior to the Provider starting work, is a completed project plan document that describes the scope and schedule for the planned project activities.

When the Provider has begun work and they are about halfway through or so we will require Milestone three, which is a project progress update presentation that contains a status description of product activities.

And finally, once work is completed, we will have Milestone 4, which is a submission of a project summary reports that contains project objectives, methods, results, discussion, any attachments with relevant data, and anticipated cost reductions that the transmission solutions are expected to achieve.

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So, a few additional details are here. Each Voucher Provider may submit up to seven unique capabilities when they apply, and a unique capability can offer the same set of services as another capability at different service levels or tiers. These service levels or tiers are intended to allow the Voucher Providers to best represent their range of potential needs for a given service. Service levels can be based on existing expertise or the size of the system to be modeled, the urgency of need, or other differentiating factors. It is up to the Voucher Provider to decide those differentiating factors. As I highlighted, each service level must be submitted as a separate application within your 7 capability limit. The unique capabilities can be the same group of services at tiered service levels and the application form must be submitted once per capability and service, no more than 7 separate times.

For example, a Provider can be applying for the same single capability, but at 7 different tiers depending on, for example, the number of engineers that need training, if it's an education focused one, or you could submit 7 different capabilities all at a single tier, or some combination of those two extremes.

I am happy to answer questions on that if there's any confusion.

Next slide please.

Great, so here are some of those example services. As I said, we are thinking of these kind of broadly and in three main categories of advanced modeling and studies, interconnection, modeling, standards developments and education and training efforts. A few specific examples are bulk power system transmission, interconnection standards and modeling, detailed modeling of power electronics interface loads or generation, power electronics control for improved flexibility and enhanced performance without adverse system control interactions, dynamic system studies, system studies and assessments related to power flow analysis, transmission impact operations and dynamics, transient stability oscillations, short circuit and power quality, hybrid interconnection studies that include both large loads and generation, Economic studies related to transmission planning, load forecasting, resource adequacy, optimal power flow, reliability impact and lifecycle cost analysis, modeling and implementation of grid enhancing technologies, for example: dynamic line readings and power flow controllers. Also modeling and implementation of solutions for weak grid conditions, and EMT modeling and simulation. All those are valid.

Next slide please.

And I'll pass it over to my colleague Andrew Torma.

Andrew Torma

So now we're going to get more into the eligibility and how to apply section. First, we'll go over these three main areas for what counts as eligible entity.

An applicant must qualify as a domestic entity. What that means is, the entity must be organized, chartered, or incorporated or otherwise formed under the laws of a particular state or territory of the US. The entity must have majority domestic ownership and control and have a physical place of business in the US.

Second big one there is that applicants must certify that they are not owned by,

controlled by, or are subject to the jurisdiction or direction of governments of countries of risk. The US Department of Energy currently defines a country of risk to include China, Russia, North Korea and Iran, but the list is subject to change.

We also retain the right to request additional information from an applicant to verify that the applicant meets these eligibility requirements and selection criteria. However, an applicant may be disqualified if the applicant engages with this program in a manner that is indecent, obscene or lacking professionalism.

Next slide.

Cool. So how to apply? As Spencer pointed out before, we have the [Opportunity Page](#) right here. You can scan the QR code to get there, or if you go to the chat we have a link right at the top, you should see a [link to go to the application itself](#). And a reminder that an application is due April 2nd no later than 3:00 PM Eastern Time.

Next slide.

If you click that link, you'll get to what you see on the top right, which will be asking you to create a submittable account. That's the first thing you have to do, is create a submittable account to access the interface that ENERGYWERX will be using to collect applications. Other materials that are required, that you'll need to have ready as you fill this out, are proving your capability. Also, you will be required to upload at least two documents. The two documents will show your expertise in providing that capability or service, that's the scope and scale of clients you've already shared and serve to show that you have experience. And then the second one will be the resumes of service Providers including their tool and software proficiencies, and then the last thing obviously will be to submit the completed form online.

So you actually have it into this middle picture and you can see here on the bottom right example what it looks like for just the 2 forms to upload and they're both required.

Next slide.

The actual form itself, so this is the key information within the form that you will be filling out online at the top right. You can see what the first question will look like and it's the certification of eligibility. So you certify that you are eligible and after that there is a lot of information about yourself as an entity, your organization's name, website address, or points of contact. There's also an option for alternate points of contact, and then the capability information. This includes a title, the capability budgets, how much it will cost you to do this. The short description of involved work in critical milestones. You'll have your core competencies, your qualifications and credentials. This will be a summary of that which would then be elaborated on more in the first of the two documents to upload.

Performance periods: or how long this will take. Again, no more than two years. Requirements from Recipients to be able to do this work: your target audience; the people that you want to be matched with as Voucher Recipients. Your geographic constraints: if you have any places you cannot do this work. Technology access: again, this is another thing that you can upload in that second document under the resumes for tools proficiencies, and then the number of concurrent projects that you can support at one time.

If you do multiple of these, then you could put down that you can do multiple at once. It doesn't just have to be 1 project. Then there'll be more questions or multiple choice about previous or pending DOE funding.

One thing I do want to point out here, and you can see it as you go through on the right side, a couple of these, like capability title, have two asterisks on each side. You'll see on the application it will define this too, but any question with that will be something that is public to the Voucher Recipient. So as a Provider you'll fill out all the information, but some of it won't be seen by the Recipient. This is something that'll happen later in the background for our matching purposes. So you want to make sure that what you put here is clear enough, and isn't involving information that you wouldn't want public to the Recipients themselves.

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So capabilities specifically not of interest. Spencer went through some example services that we have shown that would work that would fit under this, but we have a couple that we want to say are nonresponsive and we will not review for this funding opportunity.

Please do not submit capabilities that are not specific to advanced electric system modeling on the US bulk power system, capabilities that focus on one specific generation source, load type or solution set, capabilities that focus solely on convening stakeholders or conducting research to produce new frameworks, propose new electricity regulations or compile strategies for improving their connection practice. We want you to actually go in and implement these solutions and improve capabilities that focus solely on the distribution level.

If you are interested in the distribution level, then we have another concurrent opportunity going on right now called the [Interconnection Cost Reduction Solution for Distribution](#), called iCRS-D, and they'll be two more office hours for that coming up too, and you can find the on ENERGYWERX's iCRS-D Opportunity page and application there. And it was posted, thank you, Julia, in the chat also.

Capabilities that have not been tested or demonstrated successfully in the bulk power system. So again, this isn't research, R&D, or coming up with strategies. This is actual implementation of successful strategies that you have done and demonstrated before.

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So review criteria: when you submit your capabilities, we have 4 main areas that we'll be using to review your capability and these are also online on the Opportunity Page. The four areas are relevance & specificity, expertise, technology, and price competitiveness.

So under relevance & specificity, that'd be the degree to which the proposed services are relevant to this Opportunity, the clarity of the capabilities and specificity of activities to be performed, and the reasonableness of the timeline

For expertise, this will be a degree of expertise and experience you've demonstrated in providing this capability prior and the degree to which the scale of experience matches the capability you're offering. So this could be like the size of systems modeled. This will also be proficiency in the software tools needed to support the capability offered, specific experience in modeling advanced grid solutions offered in the capability, and documentation of past similar work to the capability offered.

So you can see the structure ties into those two documents that we're having you upload in the application.

Then technology, so access to tools and hardware necessary so you can actually execute your capability, and availability of specific software that's necessary to execute the capability. So not that you don't just have access, but it is available for you to use.

And last one we did say that the price that we're looking for is generally between the \$50K to \$250K range for the capability. But we will be using multiple criteria, or competitiveness compared to the other capabilities we get. So the degree to which the price is reasonable for what you're saying you're going to do and competitive for the scope and scale of what you're offering.

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Another higher level criteria that we'll be reviewing or we may use to review your application will be looking at the most impactful portfolio we can get out of all the funding projects, the matches we'll make, and there's three main areas that we'll be looking at.

So this is: the proposed matches that will make our capabilities to put in will strongly align with the goals, priorities and ongoing activities of the i2X program. They will also advance key energy goals related to the grid modernization, streamlining of interconnection processes, and cutting of red tape, and energy addition, which are larger DOE priorities.

And lastly, this will expand all the products we have in the portfolio, expand the geographic diversity of organizations and regions that are participating in our DOE supported interconnection initiatives.

Next slide.

Cool. And this will be the last slide before we get to the questions.

What happens in the timeline?

And either someone else, either from ENERGYWERX or from OTC will get a little bit more clarity, or a little bit more details to the Voucher Program as a whole, but we have 3 phases. The first phase is a Provider phase and that's where we are now. So we're in the two more pink boxes. The submission is open and we're at the OSS. The next two we'll have office hours and then the application will be due.

The next phase, after all the capabilities come in and we can put them back online into somewhat of a marketplace. The Recipients will come on and see those and we'll have an open submission for Recipients, where Recipients come on and see the capabilities that are offered. We will have the same thing, an OSS and office hour, and their applications will show what they need and they can rate the capabilities they see.

Then phase three will be us matching, so reviewing capabilities, reviewing the Recipients, matching Providers and Recipients together. Then they'll be negotiations. The projects will then kick off and then they'll be completed.

So this ends.

The applications are due here for April 2nd, then it'll be April to May that we'll get the Recipients, and then we'll do the matching anywhere in May, June all way through September when they'll kick off, and then two years later is the expected end date.

Again, these projects can happen earlier, so if your capability's only a year long, that's fine. It's just like the longest end date, it would be two years.

Cool. And Yep, all dates are subject to change. Just put that in there.

Next slide.

And I will pass it back off to ENERGYWERX to manage the Q&A.

Christi Pezzone

Perfect. Thank you so much. We're going to pull that up. Just as a reminder, the code for Slido is iCRSTOSS. And now Eli will start with our Q&A.

Eli Huebner

Thank you, Christi.

All right, first question. **Once selected as a Voucher Provider, is there a limit to how many Vouchers can be awarded to a single Provider? Is there a rough goal or target?**

Ammar Qusaibaty

That's a great question to Sara or Christi, given your experience in that space.

Christi Pezzone

So it will be dependent partially on the Recipient applications. How many Recipients will, 1) if you're selected, 2) if there are Recipients for your matching, and what throughput you submit in your application. So how many capabilities you can run at the same time. There isn't a goal or target. It's kind of dependent on Recipient applications and what the throughput is of the Voucher Provider.

Ammar Qusaibaty

Right.

Eli Huebner

Next question. **If a Voucher Provider is selected, will all levels of the Provider's service offering be accepted, or is each level/service tier evaluated independently?**

Ammar Qusaibaty

To give a quick answer, and I think Christi can add more color, you know you have an option to submit up to 7 capabilities. Each one will be reviewed independently according to the criteria. Let's say you submitted 5, you know. Five and there's two that scored high and then they will be selected. But the others may necessarily, you know, according to the criteria, did not score high and they're not selected, they will not be selected. So I think the point is that they will be reviewed each one capability. Independently.

Christi Pezzone

That is correct.

Eli Huebner

Thank you. **Should one institution only submit one application that covers multiple capabilities? Or should one institution submit multiple applications?**

Ammar Qusaibaty

I'll try to answer this question. It is one application and you list in the application the capabilities. You have up to 7 capabilities to include in your applications for that institution. But Christi, if you think otherwise...

Christi Pezzone

Yeah, I'll jump in really quick. So it's actually one application per capability. You will submit for each tier that you have or if you have multiple capabilities, you're going to want to submit an individual application for each one of those, please.

Eli Huebner

Thank you. **Is installation of hardware permissible under the scope of the Voucher?**

Ammar Qusaibaty

We'll get back to you on this. In an essence, the focus is really about modeling. So, the Voucher, the utilities who want to do this kind of modeling, right?

I doubt there is an installation component part of it, right? It's really what they're looking for in terms of modeling or training. That's the capabilities that they're looking for. So the matching would happen that way.

Eli Huebner

Would ICRS-T consider projects that translate distribution DER flexibility into electric-equivalent capacity to support large load interconnections?

Ammar Qusaibaty

So the focus of this Opportunity is really on transmission interconnection, things that you will encounter related to transmission interconnection in terms of studies or modelling. So if this particular case, distribution DER flexibility, is related to a project that's going through an interconnection queue, and a utility or an interconnection transmission Provider is interested and they're studying, they want to study that that could be an, you know, a qualified capability.

Eli Huebner

Thank you. **Is there a limitation on how many / how much of the Vouchers can be provided to national laboratories?**

Ammar Qusaibaty

So we highlighted this earlier that at this time we're unable to match capabilities from national labs because we don't have direct funding to the national labs under this Opportunity. Which is typically the case with Voucher Programs, so there will be no matching at this time.

Eli Huebner

Thank you. **Could you provide more details on how Voucher Recipients will be matched with Voucher Providers?**

Ammar Qusaibaty

So this question I guess maybe to Christi or Sara, you have the experience with that.

Christi Pezzone

Yep. So once we have all of the Provider applications and the Providers are selected, we will be publishing a capability tool that will be online before the Voucher Recipient applications open or probably at the exact same time they open. The Voucher Recipients will be able to go through and review those fields that had the double asterisk. Those fields will be published. The Voucher Recipients will be able to go in and review each capability and rank which ones they're interested in being matched with and submit their application towards those capabilities. And then DOE will review the applications and decide which Recipients are selected and then they'll review the matches. And based on the capacity and how many Providers they have available, how many Recipients they have available, they will determine what matches will take place.

Ammar Qusaibaty

Thank you.

Eli Huebner

The program page lists "...implementation of grid-enhancing technologies, such as dynamic line ratings and power flow controllers." Does this allow HW installs?

Ammar Qusaibaty

HW installs meaning hardware installations? It's unclear, but let's say let's go with that as an assumption. But if we don't answer the question clearly, please, you know, ask the question with more details so we can try to address this one. But my guess is. The idea here is that you are studying grid enhancing technology as part of modeling. You're installing grid enhancing technologies or dynamic line rating to implement the solution. It's more of a modeling of that.

In a particular case, and that's the same thing. If there's a specific type of hardware that has to be installed that fits under the umbrella of grid enhancing technologies and you want to, you know, the work is to analyze it, to model, to study it as part of an interconnection and that leads to cost reduction, then that is within the scope. It's about studying it, modeling it much more than actually installing the hardware. The

installation of the hardware that typically has to do with the applicants who went to the interconnection and have that particular have an app, you know, they have a project. And maybe the grid upgrades would require this hardware install and that will be up to the utility or the ISO to say, yeah, you can, you know, interconnect that system if you do this hardware installation. But this Voucher Program would not pay for the hardware itself.

Eli Huebner

Thank you. **Will there be any feedback or flexibility on the pricing and level of effort for a capability once it is submitted?**

Christi Pezzone

No, that is why we are allowing you to submit multiple capabilities so that you can kind of tier that up and the price that you submit is the price of the capability. There won't be negotiations on that after the fact.

Eli Huebner

Thank you. **So, we could offer a generic solution and then each time it is selected get paid \$250K?**

Ammar Qusaibaty

That's not what we presented. We are encouraging people to not submit generic capabilities, but each capability matches the scope of effort. You know, depending on the scale of things, the \$250k is the maximum amount any Voucher could receive, right, so we highlighted the range between \$50k to \$250k. So that's not the case. It will be hard to match a generic solution up to \$250k without knowing what that capability is really in detail. That will be my answer. I don't know if Christi, do you have any other thoughts?

Christi Pezzone

I would recommend not submitting A generic solution. You want to submit a specific enough capability that DOE is able to evaluate and find Recipients for your capability. Thank you.

Eli Huebner

Apologies if I missed this, but can you describe the types of Voucher Recipients you expect? Has DOE done this before? What were the different types?

Ammar Qusaibaty

Christi, you want to go first.

Christi Pezzone

Sure. So, we at ENERGYWERX have done the Voucher Program before with DOE, just with different program offices. So the type of Recipients that we have had in the past really aren't applicable to this project specifically. But if Ammar, if you or Spencer or if Andrew wants to go over kind of what kind of Recipients do you expect, I don't know if there is an expectation for the type of Recipients. It's really going to depend on what the Providers submit as their capabilities.

Ammar Qusaibaty

Yeah. So the most likely sort of Recipients in this, the Voucher Recipients, sorry, who do you expect that need that kind of modeling, let's say to simplify the terminology? That capability that you're submitting for our utilities or independent system operators, transmission Providers who really are looking for these advanced modeling studies as they're going through an interconnection study or a cluster study, these are the ones you're targeting. In this, by submitting that capability, these are the in a way the customers that you're going after so.

Christi Pezzone

Thank you.

Eli Huebner

Please elaborate on any Intellectual Property (IP) related terms, for example whether the IP created under the Voucher Program is transferred or licensed.

Sara Harvey

I can take this one. The IP terms will be negotiated once the match has been made when we're negotiating those contracts, but we use pretty standard IP terms that are used across the DOE and other agreements. More to come on that after you're matched.

Eli Huebner

Thank you. **Can current i2X awardees be considered or encouraged to apply for this Voucher Program if their proposal is relevant to transmission modeling?**

Ammar Qusaibaty

I would say if the work is not duplicative, right? So as a capability, I don't think I see an issue really. This capability will still have to be matched by someone that wants it, by an organization that wants it. And they have a specific scope for it that, you know, helps them with their interconnection issues. So it's not going to be duplicative by the work because whatever funding opportunity or funding that the awardee has from i2X was not going to be the same. So I don't see an issue.

Eli Huebner

Thank you. **Are the slides available online?**

Christi Pezzone

The slides will be available online. The slides, the recording, and the transcript will be posted no later than tomorrow, so those will be available on [our Opportunity website](#). I believe Julia just posted the link in the chat and then the Q&A will be available probably later next week after DOE has a chance to review everything and add anything to their responses that were provided today.

Eli Huebner

Thank you. **What is the timing of payments to the Voucher Provider? Apologies if I missed this.**

Christi Pezzone

So that will oh, go ahead.

Ammar Qusaibaty

So we had a slide about the four milestones. It's a milestone based payment and we had a slide on that to explain once you're matched and everything is done, then you go through these four payment milestones. And it's in one of the slides that we will share.

Eli Huebner

Under the "Interconnection modeling standards development" service, would that require the 'development' or does it include the 'adoption' of existing stds?

Ammar Qusaibaty

I don't know. Spencer, do you have thoughts on that one?

Spencer Doyle

Yeah, I would say it depends on the needs for Recipients that apply if they are out of state or they are, for example, interested in adopting some sort of standard or they're exploring it as a possibility, and they have modeling needs to verify compliance or difficulties that might arise then in that case, I would say it's more on the adoption side, but similarly if there is interest in development and there are modeling needs to inform the development, then I would say that as well. We can't guarantee anything. It depends on what the Recipients are interested in, but I could imagine use cases that we would support for both development and adoption.

Eli Huebner

Thank you. **For a utility application, would the resumes required for the application be those of the transmission planning engineers that will be involved?**

Ammar Qusaibaty

So in the case that a utility would like to offer a modeling capability to other utilities or independent system operators, and you have the engineers who have expertise in transmission planning and that's the capability that they want to offer. That will be, you know, the right team to highlight or to include in describing that capability. And therefore when we review according to the merit review criteria, we will, you know, know that you know they are qualified staff that can do this work.

Eli Huebner

Thank you. **Is there cost share?**

Ammar Qusaibaty

I think Sara may want to answer that question. Go ahead.

Sara Harvey

Yes, I believe for this Opportunity there is cost share for investor owned utilities and I believe it's 50%.

Ammar Qusaibaty

Right. So again, if an investor, investor owned utility wants to offer modeling services to others that that would be the case.

Eli Huebner

Thank you. **How is the process of matching Voucher Providers to grid operators? Can Voucher Providers work with multiple grid operators across various regions?**

Ammar Qusaibaty

I think this is similar to another question which was can you be matched with multiple Recipients and whether there are multiple reasons or not. So I think there's no issue as long as you have the bandwidth to support multiple requests or multiple services at the same time. There's no limitation, but that has to be highlighted. So I don't know, Christi, if you want to elaborate on this.

Christi Pezzone

No, that's correct. I would say really the limit of the number of matches that you get is dependent on your throughput that you can handle and the Recipient applications.

Eli Huebner

Thank you. **Can you elaborate more on the cost share response?**

Andrew Torma

I think I could.

Ammar Qusaibaty

I'm not sure. Yeah, go ahead.

Andrew Torma

I think I could jump in because I think I know where that might come from. What we just said. This is the Provider Opportunity. That's the application that's going on and the Provider is saying how much their capability will cost. Next will be the Recipient, which we had said we expect utilities, and will apply to be Recipients. The Provider is the one who'll be making an agreement with ENERGYWERX and getting funding as in kind support if that Provider's utility. So that utility, sorry if the Provider is an IOU, investor own utility, because they are then going to give the modeling capabilities and training to the Recipient. That's when the 50% cost share happens. The Recipients themselves, that's not part of this. So it's just this application window. Sarah can jump in if I if there's more details there, but that's like.

Sara Harvey

Yeah. Yep, that's correct. So the Providers will be providing these services to the Recipients, which we expect many of them to be utilities. And so the Providers, many of them we're expecting to not be utilities.

And they will have no cost share. But if a utility applies to be a Voucher Provider to receive the funding for these capabilities, that will come with a 50% cost share. But anyone that is not an investor owned utility who applies as a Voucher Provider for this program will not have cost share.

Ammar Qusaibaty

So yeah, I will elaborate. If you're interested in this program and you would like to receive some modeling services, do not apply because there will be a phase two in which there will be an open opportunity for utilities or independent system operators to say, this is the type of things that we like in that menu of capabilities and we want to be matched with those. So that's at the later stage.

Sara Harvey

Thank you.

Eli Huebner

If the submitter has Patented Technology that would be modeled, how do you keep the IP from distribution?

Sara Harvey

Again, IP terms will be negotiated at the point where you're matched, but you should include that in your application.

Eli Huebner

Thank you. **If we're selected/matched with 3 different Recipients, each for \$100K, is that allowed? Question is about the \$250K, which is the max per Voucher only, right?**

Christi Pezzone

Yes, that is correct. The \$250K is per capability and so you could potentially have a capability that is \$250K and be matched with four different Recipients. So the value of that Voucher would be greater, but the value for each capability cannot exceed \$200k.

Ammar Qusaibaty

That's correct.

Christi Pezzone

\$250K.

Eli Huebner

Right. Thank you. **If you are selected as a Provider, but no Recipients pick your capability/service level combo, is your project no longer selected/moving forward?**

Ammar Qusaibaty

That's right. I mean the idea is that your capabilities, no one picked it, so you will not be matched with anyone and therefore there will be no funding going to that

capability because no one wants, you know at this time, to use that capability. So it'll be still listed on the, you know, website. Uh, but it would not be matched at this time.

Christi Pezzone

Thank you.

Eli Huebner

How tightly scoped do you recommend each capability be in terms of deliverables and timeline, so that it's easy for DOE and Recipients to evaluate and match it?

Ammar Qusaibaty

I will pass it on to Sara or Christi since they have experience with, if they have any recommendations, I quickly will say look at the evaluation criteria and try to maximize being selected for that capability to the best of your ability. But I don't know, Christi or Sara if you want to add more.

Christi Pezzone

No, I think that's absolutely correct. What you just said, Ammar, I don't have anything else to add.

Eli Huebner

Thank you. Finally, **Could discouraging "generic capability" submissions lead to arbitrary and unjust Interconnection Cost Reduction Solutions?**

Ammar Qusaibaty

I'm not sure I understand the question. It sounds to me a little bit speculative.

Christi Pezzone

So I believe this is with regards to my response earlier about recommending not submitting a generic capability for \$250,000 and the submission not drilling down at all. So you're more than welcome to submit whatever capability that you would like. However, I think that the program office has some expectation that if it can be scaled, you will submit an application for each of those scalable layers for that capability so that they can better decide who to match you with. It's a lot easier for

matching if you're more specific in your capability than if you are super generic about it, because that will allow the Recipients to look at it and see if what they. they are looking for would be a good fit with what capability you are offering.

Amar, I don't know if you have anything to add to that?

Ammar Qusaibaty

No, I mean, great answer. I'm sorry, I didn't understand the question to be honest, so I apologize.

Christi Pezzone

Oh, that's totally fine.

Spencer Doyle

I think I would just add like think of it from the Recipient's perspective, right? Like when they're looking at the, you know, offered capabilities, would they prefer to pick one that is specific and very clearly matches what they're looking for? Or a more generic version that may be what they're looking for? They'd probably be more inclined to put it as a preference, but more specifically address their problems. So try to think from the perspective of the Recipients. You know, what would be the opportunities that they are looking to request?

Christi Pezzone

Thank you.

Spencer Doyle

Thank you.

Christi Pezzone

So we have wrapped up but our questions are still open. If anybody has any additional questions after hearing the presentation, I will go over a couple of housekeeping things now and if any other questions pop up, we'll jump back over to those.

So, all questions, as I have said, including those that we said that we needed to go back and look at and get an answer for you, those will be provided to DOE and they will have the opportunity to provide any additional insights or helpful information before they're posted on the Opportunity Page next week. Please remember that all submissions are due Thursday, April 2nd, 2026 at 3:00 PM Eastern Time, and in the chat you will find the following links to the eligibility evaluation criteria, required templates to complete and application forms for consideration. After today, we will place the recording of today's webinar on the site as well as the PowerPoint slides briefed.

Please [RSVP for the March 17th informational webinar](#). That is at 3:00 PM Eastern Time. We will be doing a brief overview of the program at that webinar, but the majority of the time will be for questions. I think that we have another question that came in, so I will throw it back over to Eli and then we'll continue with closing.

Eli Huebner

Thank you. **It sounds like Recipients are able to state their preferences for specific Voucher Providers. How are preferences considered in the matching process?**

Ammar Qusaibaty

Christi or Sara?

Christi Pezzone

Yeah. So, yes, they are able to state their preference in their application. The Recipient application will be evaluated and they will decide if that is a good fit for that Voucher capability that the Provider is offering. DOE will make that determination.

I don't know how else to elaborate on that one. I think that they're looked at and evaluated based on your application and what the Provider's capability is and I think that that is the best answer that I have for that.

Eli Huebner

Thank you.

Ammar Qusaibaty

They give us, you know, I was going to speculate on how, you know, let's say there are three capabilities that they like. Their first preference is 1, 2, 3 and we think #1 fits and DOE thinks like, yeah, that's perfectly fine. So we'll, you know, they will be matched.

Ammar Qusaibaty

If we think #3 is the best match or option in this case, then we will match with #3, but not one and two. So it really depends.

Spencer Doyle

We will also have insight into more information from the Provider applications that the Recipients don't see, right? So we will also be considering, for example, the bandwidth of all of the Providers. And so if a bunch of Recipients all wants to work with the same Provider, but that Provider has told us that they're not able to, you know, have that bandwidth, they were going to need to do some optimization. So preferences from the Recipients are not the only variable, but obviously a very important one.

Sara Harvey

I'll also add that both the Provider and the Recipient need to agree on the match after it's made by DOE. So like everyone will have time to make sure that they're OK with the match.

Christi Pezzone

Yeah, the process is after the matches are made and approved, then ENERGYWERX will reach out to the Providers with the Recipient match information and the Providers will make the determination on whether or not they can accept that match. And they will let us know if they accept it. Then introduction emails will be sent to both the Provider and the Recipient, kind of saying, hey, here's the contact information for your match. Please start moving forward to get any agreement that you need to have in place before you start work and then work will begin on the capability.

And so it looks like we don't have any more questions. Just a reminder, if you have any questions before the next upcoming webinar, please reach out to info@energyworks.org. I want to thank everybody for their time today. Thank you, Amar, Andrew and Spencer for presenting and thanks to the ENERGYWERX team for your support and I hope everyone has a great rest.