

2026-04-02 iCRS-D Informational Webinar Transcript

Christi Pezzone 0:03

All right, let's go ahead and get started. Good afternoon again, everyone, and welcome to our informational webinar for the Interconnection Cost Reduction Solutions for Distribution or iCRS-D opportunity. My name is Christi Pezzone. I am the Deputy Director here at ENERGYWERRX.

A couple of notes. No AI bots are permitted. They will not be allowed in from the lobby and if they slip through, we are going to go ahead and remove them from the meeting. Next slide please.

This is an information session. If you have not been to one before, there will be some time to address some questions after a briefing from the program office on ICRSD. You can see the Slido information on the screen. That is what we use for questions. Please drop all of your questions in Slido. You can either go to the Slido homepage and enter A20H lowercase letters or scan the QR code on your screen below. You can go ahead and enter questions there at any time. You will also have the opportunity to upvote any questions that you see that you might also be interested in hearing a response to as well. Once DOE has had time to review the Q&A, we will post it to our website.

We will also be posting the recording from today and the transcript. Those will be. Those will be posted on the opportunity page tomorrow. A few upcoming-- well, just one upcoming date I want to go over. Applications close on **Thursday, April 16th at 3:00 PM Eastern Time**. If you have any application issues or any questions after this webinar, please reach out to info@energywerx.org. Moving on to the overview portion of the webinar. Next slide please. I will be turning it over to Andrew and Spencer from the Interconnection Innovation Exchange Program.

Andrew Torma 2:40

Perfect. Thank you so much, Christi. My name is Andrew Torma. I am a technology advisor in the I2X program, and I will let my colleague quickly introduce himself to you.

Spencer Doyle 2:52

Sure. Thanks Andrew. My name is Spencer Doyle. I am also a technical advisor on the I2X team at DOE.

Andrew Torma 3:00

The I2X program is the Interconnection Innovation Exchange. It is at the DOE. We are a multi-office group under the Critical Minerals and Energy Innovation Office that is housed within that Integrated Energy Systems office, but we work across many offices.

As we talked about, we are here for the iCRS-D funding opportunity. This is just a quick agenda. It is going to be an overview of what the I2X program does, an overview of the program itself. Then I will turn it over to Spencer and he will talk about some common FAQs we have gotten in the overall timeline and then open up for everyone to ask some questions and hopefully we can give sufficient answers to them all. Next slide.

Our mission in I2X is to enable simple, fast and affordable interconnection while enhancing the reliability and security of our electric grid. As I said, multi-office, we work across many different offices within the energy technology pillar of CMEI. We also work with Office electricity and other pillars of the DOE to make sure we hit all different aspects of interconnection within that mission. To support that mission, we have 4 main areas we work in, strategic solutions, stakeholder engagement, data analytics, and research and innovation. We have these four main pillars with which we organize our work, which can go to the next slide.

Here are just some examples in the last year of what I mean for the type of work under each of those pillars. Under strategic solutions, we have created 60 plus real-world solutions for the transmission and distribution grid around four goal areas. This is increasing data access, transparency, improving process and timing, promoting economic efficiency, interconnection and maintaining a reliable secure Grid. On our stakeholder engagement, we have opportunities like I2X, which is an online platform that you can join and talk to other experts in the field about our connection. We have hosted many events such as the I2X forum for the

implementation of reliability standards and transmission, which is called I2X First. We have had many events and presentations to disseminate solutions from our strategic solutions exchange and we have also had many lab hosted events such as our solution exchange webinars to cover the distribution energy interconnection solutions we have come up with.

In data analytics, we fund a lot of work from national labs to come up with research information about the interconnection system or process such as queued up as the 2025 queued up report came out recently and we are expecting 2026 report to come out soon too on the bulk power system queues. We have also had reports on the cost estimated cost of generator interconnections on the bulk power system.

then under research innovation, which is where this type of program falls under this PIICRSD. We have another PIA going on called iQMS, which is the interconnection queue management solutions PIA. We are going to find utilities right now and Sandy and SIPA are helping lead peer learning opportunities.

We have also had a white paper about direct transfer trip from Sandia and EMP training on a bulk power system grid from ORNL, who's working with ESIG and NERC. Next slide.

. that is the background of ITEX program and where we are coming from, the kind of work we try to do. within that purpose and square mission, we have the ICRSD program, cost reduction solutions for distribution grid and in this program.

Our whole goal is to reduce interconnection costs related to distribution, distribution, grid upgrades by directly funding organizations to lead local, state or regional partnerships to demonstrate innovative solutions with Lighthouse projects. I will get into more of what all those different parts mean.

This is what the website looks like when you go on. ENERGYWERX has a website that they are hosting that has all this information and more. A bunch of the FAQs we have had in the past and the video recordings from past office informational sessions.

You can also scan the QR code here to take you straight to that page. Reminder applications are due no later than **April 16th at 3:00 PM**. The total funding for the program is \$4 million. Next slide.

as I said, to break it down a little bit, what do I mean by Lighthouse projects? The goal is that these partnerships will intimate projects that are pilot programs that develop and demonstrate new technologies and effective solutions for interconnection. The goal is that these efforts will deliver tested approaches to

scalable interconnection innovations that improve the process, reduce overall cost and.

Maintain a reliable grid. Who are we funding to do that? We are going to fund one lead partner or the applicant, but they will represent a multi-stakeholder partnership composed of organizations with the capabilities, expertise and authority to implement the proposed Lighthouse projects. Organizations could be distribution utilities, state regulators, state government organizations or developers.

Again, this would be organizations that can help with the capabilities and expertise to implement these projects. What are we funding? Again, it is the lighthouse projects and what they should do is implement process technology solutions in the distribution grid with the aim to improve interconnection timelines and cost by three main categories versus splitting.

Up into is maximizing economic efficiency, increasing data access and transparency, or by streamlining services, and we'll get into more examples further on about those. Next slide.

Again, how are we going to do this? This is a two-year program, for up to two years. It can be shorter if your proposed solution is shorter than that or proposed project. The funding level is up to a million per lead organization. Again, these multi scale partnerships that will execute these lighthouse projects will apply their distribution level expertise to prioritize and adopt practical solutions for loaded generation interconnection. By implementing these projects, we expect you to perform stakeholder engagement and facilitate cross-learning, conduct analytical research and modeling to develop the solutions, then provide so much better expertise to support the technical innovation and implementation of the solutions in the Lighthouse project.

Then finally, pilot the solutions in a local environment under real-world conditions and scenarios. The goal is that after all this, the results will give you solution development, a field demonstration and lessons learned that will be shared publicly with other actors in the field. Next slide.

Here are some quick examples. Again, what we talked about was maximizing economic efficiency and then that idea of better accommodating growth and maybe getting costly system upgrades. Such solutions you could focus on are developing

integrated grid planning, proactively upgrading feeder circuits, designing future ready industrial parks for energy intensive industries like data centers or developing process for flexible interconnection or co-located generation such as hybrid facilities within improving or increasing data access and transparency or aiding project development and cost estimations.

You can increase public access to aggregated anonymized grid data, implement advanced hosting capacity analysis and services, identify grid sections that host surplus interconnection services and capacity to avoid cost upgrades and integrate grid enhancing technologies. then lastly under streamlining services and processes or facilitating efficient screening methods, remove undue burdens. This could be harmonizing interconnection procedures across service territories, automate management systems and technology screens, providing fast tracking or expedited services based on system impact controls, potential grid services, and other features of interconnection generation overload, implement cluster studies for efficient permitting and grid upgrade cost mitigation or sharing. cost allocation ideas and increase energy project readiness requirements and incentivize streamlined processes within that you can go quicker from the start. Those are examples. Next slide

I will pass it over to Spencer, he's going to go through some of the common FAQs we have gotten so far.

Spencer Doyle 10:54

Perfect. Thanks, Andrew. We will just go through a relatively short list of some of the frequent questions we have gotten so far and then save ample time for any questions that you have on the on this call.

Starting with questions around the funding structure. One common question we have gotten is clarifying the structure of the funding opportunity. Is this a prize or a grant? Is it similar accounting to an SBIR or a prize? The answer to the clarification is that it is neither. This is kind of a class of its own. It is a business-to-business agreement with ENERGYWERX. ENERGYWERX is acting as a partnership intermediary of the Office of Technology Commercialization, or OTC at the DOE.

Another question we get fairly often is what reimbursement looks like is, The funding is reimbursement based, what are ineligible expenses? For example, travel equipment, things like this. The answer is that selectees will sign a fixed price agreement and that agreement is milestone-based. That will be signed with DEFENSEWERX, which is doing business as ENERGYWERX. All payments are results-driven and paid upon successful completion of specific deliverables and milestones. These are milestone-based payments, which is how the agreement works. The payment terms will be outlined in the agreements that you sign. Selectees are paid in arrears, which essentially means that.

After the work is completed to complete and DOE verifies milestone completion a milestone payment will be dispersed. This is a firm fixed price agreement and ENERGYWERX and DOE do not have ineligible expenses listed and will not be tracking salary or fringe expenses.

Do we have specific deliverables required for this funding opportunity, or does the applicant determine the deliverables and feasible measures of progress? The answer is that the applicants are required to define the project, their deliverables, their milestones.

What they plan to produce and how they plan to measure the success of their project and DOE will score what is submitted according to the review criteria, which you can review online. Can we break down the cost share for investor-owned utilities? Would they only cost share 50% of what they are given? The clarification around IOU cost share is that cost share is only required for IOUS if they are the prime applicant. It is a 50% cost-share of the total project cost. Any IOUS that are prime applicants have this 50% cost share. In other words, for each dollar that is provided by the DOE, the IOU must provide a dollar of cost share. OK, next slide please.

These are our final three FAQs that we will go over as a group. The first one concerns national labs. Are national labs eligible? If so, what are the limits for their participation? The answer there is that DOE will not at this time be directly funding national labs or FFRDCS via the PIA. However, FFRDCS may participate as a sub recipient. You can't be the prime, but you can be a sub recipient for another

selectee. In that case, if an FFRDC is a subrecipient, their efforts in aggregate should not exceed 10% of the total federal share of the project and ENERGYWERX and DOE will not be involved in or assist in those activities. Selectees will receive their full funding through a business-to-business agreement with ENERGYWERX, and the selectees are solely responsible for funding and executing necessary agreements with those sub-receptions.

OK, second to last one, does utility have to be a part of the applicant team or partners? The answer is that the program does not require a utility to be a committed partner to apply. However, a utility teaming partner may be critical to implement the proposed interconnection solutions. Per the review criteria, the program requires A partnership that contains organizations that have the authority to implement the Lighthouse project. In short, if what you are proposing would require utility buy in. They should be involved. Finally, under scope and partnership, we list that should include signed partnership agreements or commitments from partnering organizations.

The question is, is this the same as a letter of intent or will a signed partnership agreement improve our application score? The short answer here is again to always go reference back to the review criteria. The answers to many questions I am sure are found there, but we will be using the review criteria as the basis to score the applications and the criteria signify two different levels of partnership commitment. For example, if a letter of intent or a support is included from a partnering entity, then the applicant in that case is addressing evidence of interest, which is something we are looking for, but not necessarily addressing level of commitment. On the other hand, if an agreement or commitment letter from a partner entity is included. Then in that case, the applicant is addressing both criteria points of interest and commitment. In that case that would be scored higher in that case. With that, I think you can go to the next slide.

We will quickly take a look at the timeline for the program.

We are currently located in the yellow top right square or rectangle there in the final office hours. As we have already highlighted, the full applications are due in two weeks, **April 16th at 3:00 PM Eastern**. We will then undergo review and selection of awardees through April, May, and June. We will then undergo negotiation with

selectees and contracting in July and August with the goal of project kick-offs in September of 2026 for projects that take the full kind of Max time allocation of two years, those will be concluding by September 2028. Of course, all dates are subject to change, but that is what the plan we have for now. With that I think we will open it up for Q&A.

Christi Pezzone 17:10

Perfect. Thank you so much. I will give Julia a chance to pull up the Slido right now. Just as a reminder, we will only be answering questions that are asked through our Slido portal. A link to that can be found in the chat. To join, you can go to slido.com and enter a2oh, all lowercase and I will turn it over to Julia now.

Julia Prudhoe 17:35

Thank you so much. All right. This one is a two-part question. The first part is **How much detail is expected in the commercialization?** Then the second part is, **should we do high level with a communications plan and product improvements or should business focused elements like customer discovery and revenue forecasts?**

Andrew Torma 18:01

I guess my clarification question I would have would be commercialization section is in the scalability and impact section. If that is the case then you review the again consult the review criteria for that part for scalability and impact in general. We know that is probably hard to get very, very detailed knowledge of what would happen in two years from now and what would happen with the project, because it all depends on the outcomes of the project and if you are selected and how everything goes and if it is successful or not. I would say review the criteria and give it to the best of your ability and detail the best of your ability of how you would if you.

If it is successful, everything goes as planned as you laid out on your project, how you'd then go from there to make sure you can scale it and make sure it stays within the community and go broader. I do not know if there is anything you want to add, Spencer.

Spencer Doyle 18:54

No, I think that sounds good. Feel free to submit another question if we are not quite answering the question directly. But assuming that you are referring to impacting scalability, that is one of three criteria. Again, I would review the review criteria.

Julia Prudhoe 19:12

The next question is,

Can you provide examples of key milestones and a payment schedule?

Andrew Torma 19:23

I can give an example of the IQMS program that is currently running. I can't comment on direct projects of any sort, but what has been happening and what we have done in IQMS is that we have had let's say three to four payments or milestones within a year and there is work.

That had to be done for each of those milestones and payment schedules and milestones. If you look at the review criteria again, I know it is a lot to keep saying that but look there and see the different things that we want to have come out and the outcomes from this project. In the proposal, we have also detailed what type of things we would want to see in general, what we are looking for are outcomes and lessons learned from each of the tasks that you would then be doing. Think about probably getting in that somewhat range of three to four milestones within a year. What we normally do in a lot of the other projects is quarterly if you split up that way, just think about the outcomes you would want for the main points they would hit. We have given some examples also in the proposal of the topics we want to see like solution development, solution integration, field demonstration. I think around those bigger terms and what steps you need to get there would be a good place to start.

Julia Prudhoe 20:42

Will optional cash match be offered be considered in the review and selection process?

Andrew Torma 20:53

I will let that go to either Energy Works or Sara if they have some ideas on that.

Sara Harvey 21:02

I am not really sure what they mean by optional cash match. They could expand a little further.

Spencer Doyle 21:10

I assume they are implying and again clarify if needed, but like if somebody were to provide cost share and fund a portion of the expenses of the project is what I am assuming they are getting at, but I am not clear.

Sara Harvey 21:30

I think it is something that you can include in your proposal, but it is not obviously because it is if it is not required as part of the criteria, there's no guarantee that it would, you know, improve or hurt your proposal.

Julia Prudhoe 21:56

They just submitted that clarifying bit optional cash match like as not required for IOU. Yes, that seems to be what they were getting it. Thank you.

The proposal template does not have a section on budget. Is budget expected to be part of the proposal?

Spencer Doyle 22:23

I am happy to take this one. Somewhat similar to one of the FAQs we went over. Do you, we will not be looking, you know, at salary breakdown, fringe expenses. A full budget is, as you've seen yourself, not a required part of the application.

But in the project proposal and description, of course we are looking for, you know, your total requested funding level with that 1,000,000 per project being the cap and to the kind of satisfaction of the review criteria.

Showing feasibility and scope, making sure that kind of the funding level that you are proposing seems to kind of make sense with the work that you are proposing. full budget, not necessary, but funding levels definitely necessary.

Julia Prudhoe 23:21

Thank you.

Will the review consider billing rates, return on investment, or other financial metrics?

Christi Pezzone 23:37

Again, this is a fixed price award, information on billing rates and other financial metrics are not required with your submission.

Julia Prudhoe 23:50

Thank you.

The project development platform for community solar and storage in ERCOT leveraging blockchain, transactive energy and aggregated distributed energy resources. Would that be an applicable application?

Christi Pezzone 24:10

We cannot speak to whether or not a proposed idea would be a good fit for this program. We recommend that you check out the website and look at the eligibility criteria and submit your application if you feel that your capability falls within that need.

Julia Prudhoe 24:36

Thank you. I also just wanted to pull up the review criteria since we keep mentioning it. If you follow the link in the chat, it takes you to the opportunity page. Can everybody see that?

Christi Pezzone 24:49

Yes, thank you.

Julia Prudhoe 24:50

OK, excellent. Yes, then you can click here on the side, and it will have eligibility and review requirements, and you can jump right down to the review criteria. It lays it out pretty clearly what the I2X team here is looking for. I would highly recommend it, as

they have highlighted multiple times in this and previous webinars, looking at that and keeping that open as you craft your application. Did you guys want to say anything specific about the review criteria while I have it up or? Anything beyond that?

Andrew Torma 25:32

No, this is directly what we will be using when we go through applications. It is like the wording here and what we will be looking at. The only other thing I would add is if you have questions of like the background, which is some stuff we went over in the presentation and why or how we are going to review criteria the.

On the left you see the topmost ones information that gives us that gives some background of like the project, why it is occurring, the way we are going about it and viewing it, just to give a little more color and story to it if you have further questions after the review criteria.

Julia Prudhoe 26:07

Thank you. Yes, that is very helpful. But back to the questions, it is not clear on the funding level. **Is it a high-level breakdown of major cost components adding up to the funding level?** Thank you.

Spencer Doyle 26:28

Andrew, do you want to fill in here? Because I feel like I attempted to answer and I do not think I was quite satisfactory.

Andrew Torma 26:40

I think really, what Spencer said is the majority of it, it is just we want the funding level you are requesting and throughout the project, throughout the proposal, if you feel it is necessary and would help to clarify why you've requested the certain amount, that is up to you and 29 your proposal.

But there's no full, full breakdown of budget, just the overall funding level that you want. But again, it is up to you how you want to do the proposal. If you think it would help support the reasonings and why and how you are building it, then you are more than welcome to include it.

Sara Harvey 27:23

I would just add thinking, think of it more as sort of like what outcomes you are going to put forth with this amount of funding. It is not necessarily how much funding you need to procure certain things to get this job done, but what is the end goal of what you are trying to produce with this funding?

Christi Pezzone 27:54

Perfect. Thank you, everybody. We will give it just a few minutes to see if anybody has any other questions. We definitely suggest reviewing all of the materials on the opportunity page. There is a lot of great information there. I wanted to thank everybody for participating in the interconnection Cost Reduction Solutions for Distribution Grid informational webinar today. All of the questions that were asked here today will be sent over to DOE for them to review and add or expand upon their responses that they have so far. Those will be posted to the opportunity page sometime next week.

Please remember that submissions are due no later than **Thursday, April 16th at 3:00 PM Eastern Time**. In the chat, you will find several links to the opportunity page that will have the eligibility and evaluation criteria that we just went over. [Any required templates to complete](#) and the [link to the application form](#). After today we will place a recording of today's webinar on the opportunity page as well as the PowerPoint slides briefed and the transcript. If you know of anybody who would be interested in this or if you want to review it, you can do it there. Should be there by tomorrow afternoon. Again, please reach out to info@energywerx.org. If you have any questions before the application deadline, we are happy to answer those, or if we do not have the answer, send those over to DOE so that they can respond. Andrew and Spencer, did you have anything else that you wanted to add?

Spencer Doyle 29:40

No, that sounds good to us.

Andrew Torma 29:43

I would also, I would add one thing is that turning it in early does not get you more points. Take your time, fill it out and do your best. There are no early points for turning it in early.

Christi Pezzon. 29:42

Perfect. Thank you everyone for attending and for your time today. Thank you to the i2X Team and to the ENERGYWERX Team. I hope you all have a great rest of your day.