

2026-06-04 iCRS-T Recipient Informational Webinar 2

Transcript

Christi Pezzone 0:05

All right, good afternoon, everybody. Thank you for joining us today for our Voucher 11: iCRS-T Recipient Informational Webinar. This is our second one. This will look a lot like the first. Go ahead, next slide.

We do ask that you submit all of your questions via Slido. You can either scan the QR code below or go to slido.com and enter ICRSTIW2. That's where we will be answering all of your questions from. You'll have the opportunity to vote any questions, if you see someone has asked a similar question to you, and see the questions that other people have asked. All questions need to be put in Slido. We will not be answering any questions that are not in Slido. This is an information session. There will be time to address the questions after the briefing from the program office on the iCRS-T for Recipients opportunity. The Q&A will be posted as well from today after DOE has some time to review. So that will be in about a week, hopefully a little bit sooner, because I know applications close on Thursday, June 18th at 3:00 PM Eastern Time. If you have any application issues or any questions that you kind of come up with after listening to everything today, please reach out to info@energywerx.org and we will get you an answer as soon as we can. Next slide, please.

I'm going to go ahead and turn it over to Cynthia for the overview portion of the webinar. She is from the Interconnection Innovation Exchange Program.

Cynthia Bothwell 1:53

Actually, Spencer Doyle is going to start us off. So take it away, Spencer. No worries.

Christi Pezzone 1:56

Sorry about that. I'm going to turn it over to Spencer.

Spencer Doyle 1:59

No worries. Sounds good. Hi, everybody. My name is Tessa Doyle. I'm a technology advisor with the Interconnection Innovation Exchange at the DOE, and I'll be starting us off and then passing it over to my colleague, Cynthia, to complete the info session of our webinar today. Next slide, please.

So, I'll be starting with a quick overview of the i2X program here at DOE, and then dive right into the Interconnection Cost Reduction Solutions for Transmission, or iCRS-T, funding program that we're all here to hear about today. We'll do a program overview, discuss eligibility, go through the application materials, the review and selection criteria, and the overall timeline for the program. And then we'll leave plenty of time at the end for an open Q&A. Next slide.

So, the Interconnection Innovation Exchange, or i2X, is a DOE program led by the Integrated Energy Systems Office within the DOE that collaborates with offices across the Department of Energy, and it has the mission to enable a simple, fast, and affordable interconnection while enhancing the reliability and security of our electric grid.

Now, the i2X program works primarily along 4 pillars. First, we work with stakeholders and researchers to help identify strategic solutions to address current challenges in both transmission, system interconnection, as well as distribution interconnection. We also help lead efforts to engage with stakeholders to identify interconnection barriers, share best practices and lessons learned, and test innovative solutions that address specific interconnection challenges. i2X leads data collection efforts and in-depth analyses that provide a good baseline information of interconnection metrics, help track progress in the space, and identify successful strategies. And finally, we lead research and innovation efforts to help improve interconnection across the country, such as the opportunity that we will be discussing today. Next slide.

So this is the i2X team. As I said, i2X is a collaboration among Department of Energy offices and labs. And so here you can see our leadership from the Integrated Energy Systems Office, as well as from offices that we partner with, so the Office of Electricity, the Office of Technology Commercialization, Office of Cybersecurity, Energy Security, and Emergency Response, or CESER. And of course, being of the DOE, we work very closely with national labs across the country to help carry out our work. Next slide.

And this is just a quick overview of some recent activity highlights from the i2X team.

I won't go through all of this in great detail, but I encourage you, once you have access to the slides, to look into some of these efforts as they're all quite compelling. So on the top left under strategic solutions, we've helped identify over 60 real-world solutions targeted for both transmission and distribution interconnection challenges centered around four goals, as you can see. On the bottom left under data analytics, for example, you can check out our 2025 Queued Up report that is on the bulk power system interconnection timelines. It's an effort led out of Lawrence Berkeley National Lab. Under stakeholder engagement, we hold, for example, the i2X forum for the implementation of reliability standards for transmission, or i2X first, which has over 1000 participants from across the industry. And if we look to the bottom right, under research and innovation, we have led more than five utility projects through the iQMS PIA, so another funding opportunity, Interconnection Queue Management Solutions, where we supported efforts to test queue management improvements with Sandia leading peer learning and technical guidance for utilities. Next slide.

So, that brings us to the reason we're all here today, to talk about the iCRS-T, or Interconnection Cost Reduction Solutions for Transmission Program. This will come up several times throughout the slides, but this is a voucher program, as Christi started us off with, and this application that is open currently is for Voucher Recipients.

So, we will talk about eligibility, but just to kind of be clear off the bat, we have already identified Voucher Providers who are listed on the website, as you will see. And so everybody on this call, if you are interested in applying, you will need to be eligible as a Voucher Recipient. So, the purpose of the program is to fund experts in bulk electric power system modeling and innovative transmission techniques. So that's the Providers already identified, who will be providing services to the transmission providers who are the Voucher Recipients. That's hopefully those of you on the call. So transmission operators will be the Voucher Recipients receiving work done by these Providers. In total, we have up to \$4 million to provide to the Voucher Providers to perform work for the Recipients. And just as this clarification note, the funding will be directly reimbursing those Voucher Providers for work that they are completing on behalf of the Recipients. You can see a kind of cover page of the [information site](#) on the right here for the Recipient application portal, where you can read more about the description and overview of the program, as well as access the

[link to start your application](#). But don't worry, we'll go through all the application materials and more in this webinar. Next slide, please.

Great. So, who can apply as Recipients? So, Voucher Recipients, or to be an applicant as a Voucher Recipient, must be a US-based public or private firm that provides transmission as planners, owners, or operators to the US bulk power system. Voucher Recipients should be responsible for modeling, maintaining, and upgrading the transmission system and have a need to advance the capabilities to help affordably and reliably interconnect additional large loads, generation resources, storage devices, or hybrid combination of, you know, storage and generation and loads.

Another note on the funding, so we mentioned there is \$4 million in total funding for the program. The expected maximum payout for a given voucher is up to \$250,000 worth of work. And those vouchers will be distributed as in-kind support, meaning that EnergyWerx will directly reimburse the Voucher Providers for the work that they have completed on behalf of the Voucher Recipients.

And yeah, final note, you can see more about eligibility criteria on the [Opportunity Website](#), but I'm sure that we will cover it today as well. Next slide, please.

Okay, so what are the capabilities that we are helping to provide here for the Recipients here that are hopefully on the call? So, we have identified 12 expert organizations who will be serving as our Voucher Providers in the bulk electric power system modeling and innovative transmission techniques space. And you can see on the right here, we have this [website with a link](#) as well. And I bet there will be one shared in the chat that will bring you to a list of those voucher capabilities that you can explore for yourself. You can filter by the organization, as well as search by the name or type of capability itself.

Just looking through the screenshot of the first, you know, seven or eight or so, you can see capabilities such as assistance with dynamic line rating, screening studies, various grid enhancing technology assessments, hosting capacity, you know, analysis, things like this. And so we have, as I said, 12 expert organizations total who are offering more than 20 relevant capabilities. And I encourage you all to look through this list of those capabilities prior to starting your applications. Next slide.

So how is this voucher program going to work in practice? We are expecting to make somewhere between 16 to 30 Voucher Provider and Recipient matches. And as I said, those have a maximum of \$250,000 per voucher and will be kind of in this range of \$50K to \$250K per voucher, and that work can be for up to two years' worth of effort. So, a given capability, it can be up to two years, but many of them are quite a bit shorter than that, and as you can imagine, depend on the funding level.

So, there will be, in general, at least 4 milestones that are involved in these vouchers, and while specific work plans will be negotiated with each identified Provider Recipient pairing, they will in general follow this structure. So, milestone 1 will involve a memorandum that verifies all requisite agreements, so any necessary non-disclosure agreements or CRADAs or site access paperwork, have been completed between the Provider and the Recipients. Milestone 2, which will still also be prior to work commencing, will be the completion of a project plan document that describes the scope and schedule for all of the planned project activities. And then once work is commenced and the work of, you know, of the voucher is about halfway through or so, we'll expect milestone 3, which will be a project progress update as a presentation to the DOE team containing a status description of product activities to date. And finally, at the end of the project, when work is wrapped up, we will be requiring a submission of a project summary report that contains project objectives, methods, results, discussion, any attachments with relevant data, and a kind of demonstration of anticipated cost reductions that the enacted transmission solutions are expected to achieve. Next slide.

Great. So, this is kind of high level eligibility requirements. We've already discussed, you know, you must be a transmission provider to be a Recipient. But beyond that, the kind of first major eligibility requirement here is that applicants must qualify as a domestic entity. To qualify as a domestic entity, you must be organized, chartered, or incorporated under the laws of a state or territory of the United States. And you must have majority domestic ownership and control, as well as a physical place of business here in the US. Further, the applicant must certify that it is not owned, controlled, or subject to the jurisdiction or direction of a government of a country of risk. The DOE defines countries of risk to include China, Russia, North Korea, and Iran, but that list is subject to change. And finally, the Department of Energy retains the right to require additional information from the applicants to verify that the applicant meets

eligibility requirements and selection criteria, and applications may be disqualified if the applicant engages with the iCRS-T program in a manner that is indecent, obscene, or lacking in professionalism. Okay, with that high level eligibility aside, we will move on to look at the actual application itself. So, I will turn it over to my colleague, Cindy, to take over from here. And you can go to the next slide, please.

Cynthia Bothwell 14:04

Great, thanks, Spencer. And yeah, I'm going to dive in a little deeper into the opportunity. So how should you apply? So first, go to the [Opportunity Page](#), read through everything carefully. And then we've highlighted here a couple links on how to look at the [Provider list](#) that we have already, that phase we've already completed. So, we have a list of Providers, as Spencer showed you earlier. And then we have another link that will take you to the [submission form](#). And so we'll look at each of those a little bit more. So next page, please.

So, the application materials. So, what do you need first to set up once you go to apply? You'll be asked to set up a Submittable account. Pretty easy: name, email address kinds of things, and then provide all the required information. Don't skip any boxes, and it's really important to have a good detailed description of what you, what you'd like to have and which Providers you think are the best, your preferred Providers. And then you'll just click and submit the form and that'll come to us for our evaluation. Okay, next slide, please.

So things, key things that you're going to need so you can prepare ahead of time for submitting the application is just an eligibility certification. So we went over that a couple of times. You have to be a US transmission provider, which means that you either plan, own, or operate, or any combination of those things, transmission in the United States. And that you're not, your organization is not on a country at risk list. You'll need your name of your organization and address, you know, typical contact information, and then you need a project title, a summary, and a detailed description. So, notice that some things are asterisked and some things aren't. And so, some of the materials are going to be what gets passed on to the potential Provider, and some of those items are just used for us internally to evaluate the proposals. So, it's very important to fill out all the boxes and do both the summary and the detailed description. So, the summary will get passed on to the potential

Providers to see if they'll agree to the match, but the detailed description is going to be used by DOE and our merit reviewers to determine whether your project has merit and it is impactful, so please take time and really describe what you need and the challenges you have on your system for interconnection and then how matching with a potential Provider will provide you with some new tools and hopefully reduce costs for interconnection on your system because that's the intent of this opportunity.

Okay, so also we're asking for stuff about your organization and your transmission roles and what data and models that you can provide to the Provider to help you in this opportunity. And you know, what we're going to, you know, who in your organization that can support this effort. Because a lot of times when you, you know, engage with an external party, you still have to manage that relationship and make sure they're meeting your needs, so we want to make sure that you have that internal support and to engage with these Providers. Then, you'll review the [capability list](#) and figure out which Providers you would prefer. You're not guaranteed any particular match, but we'll start with, that's a really good starting point, and we try to meet those requests provided that those Providers have the right capability threshold or, you know, that they have the man hours to support that request. And then we have some typical, you know, to understand who your organization is, some checkbox questions. Okay, next slide, please.

So, I started to say a detailed project description. So, this gets into a little more detail. It is two-page max, so the detail's not too overwhelming because it needs to fit on, you know, a standard 2 pages. Describe your current business practice and how this new capability to your organization will be helpful and help modify your current practices and help save interconnection costs. So again, your role as a transmission provider, how your existing queue volume is now and what challenges you're experiencing in your interconnection queues, you know, how you're going to maybe more broadly adopt this process once you've received this assistance. And again, what I said before, you know, what staff time, what models, what data you can provide, and, you know, just again, your prediction of how this can either reduce cost to the interconnection customers and to all customers, reduce process time, or both.

And then also important is the timeframe to complete the project. So, if you have urgent needs, we don't want to match you with a Provider that maybe is going to take longer, you know, a year or two years to meet those needs. So that's also helping us make sure we're recommending the best matches based on your, how urgent your needs are. Okay, thanks. Next slide, please.

Okay, so just another look at the capabilities that we're offering. I am not listing them all, but they generally fall into these particular buckets:

- Helping with modeling and implementation of applied grid solutions. So you probably already do some types of system modeling, but maybe you don't know how to incorporate dynamic line ratings in your process, or you don't know how to do an EMT model for some type of new technology, and so those are the kinds of things that are being offered. A little more support, a deeper dive on EMT modeling since that's becoming more broadly needed for interconnection with inverter-based resources. So we have some capabilities around that.
- Loads generation and the hybrid combinations. We have a few things that are related to very large load specific, so look for those if that's a challenge in your service area.
- And then advanced hosting capacity. So this is going beyond what FERC is requiring if you're FERC jurisdictional, and it's trying to go to the next level and incorporate dynamics or stability considerations into the hosting capacity so that you're also sending a signal out to the interconnection customers in your area that there are constraints based on weaker grid conditions, or something like that.
- And then we have some new and unique capabilities around artificial intelligence. So that could be help automating processes or just understanding what AI is and how it might help you in your interconnection process. So, more of just training on AI versus actually implementing a solution, but hopefully specifically training that would help you then use that for interconnection applications.

So for the [full list](#), please see the detailed list and it'll tell you the Provider's name, business and business organization and what types of services they would provide. Great. So next slide, please.

Just a few things that we're not interested in in this. Again, this is for interconnection and to have solutions that are kind of newer, innovative solutions that will reduce costs. So we're not looking for things that don't help reduce costs on the system. We're not providing services to do general generation and transmission planning or siting types of activities, even though those, you know, doing good planning can save costs in the long run. We're really focused on interconnection queue type activities. We don't want to get in the middle of FERC or NERC compliance activities. So, we do have other opportunities for that if you need that. But these are really focused at things that extend beyond NERC and FERC compliance.

We, if it's not advanced electric system modeling on the bulk power system, I don't think we stress that enough yet, but this is transmission and bulk power system related. So we're not doing distribution type solutions. We did have another solicitation for that separately. We don't want to focus on one technology or one project, so we want to be, you know, looking at, can this apply to a broad set of technologies and how can this help integrate things? So don't say I'm working on project A in this place and I, you know, really want to focus on that. we would, your activity might help with your project A, but we hope that the opportunity would be broader for your company and could be more broadly adopted. So we're not focusing on one specific project. Proposals that focus solely on convening stakeholders and conducting research is not what we're looking for. Again, not distribution solutions, and we're not, although we're wanting to be innovative, it needs to kind of be ready for prime time. So we're not going to be helping with super fringe of type of activities. It's kind of got to be already tested and demonstrated and we're not looking to prove about some new technology that's never been used before. Okay, I think that's all our kind of what we're not interested in. So next slide, please.

So now this gets into the criteria for which we're going to evaluate the proposals that we receive. And again, this is where we need a detailed description about the project. So, we're going to be looking at scope and feasibility and some of the things I've already mentioned. So, I'm not going to go into this in big detail, but know that these types of things are important for the projects. And, you know, should we get a large number of projects and we cannot fund them all, then we're going to use these criteria to help down select the projects.

So, we want to make sure your team is qualified and authorized to work with the project. So that's the teaming and the cooperation that you have the models and data and you're willing to share it with a Provider to help as they need it to get the project moving in the direction it should be. And next slide, please.

Then we also have the project impact. So again, is this just a limited time thing or, you know, on one end or is it our higher value, higher impact, like can really make a lot of difference in the queue and changing your business practices around that? Okay. And again, I didn't read through all this because I really want to get to your questions and make sure we answer those, but please review those when you have the time. Additionally, next slide, please, we may have some program policy factors.

So, they might be evaluated based on other things about how they align with our objectives and support DOE priorities. And then the regional impact and replicability is, again, is it just this very project limited in scope or can other entities learn from the particular project and have this broader learning opportunity? And we also like to have geographic diversity. So we're not doing projects all in the same area. And next slide, please, kind of shows you our timeline that we've been on.

So, we already finished phase one that was selecting the Providers. So, they're all now listed for you, and we're now in this Recipient solicitation phase. We're kind of in the middle, there, at this office hours on June 4th. And so the next step on there is the applications are due June 18th by 3:00 PM Eastern Time. And after we receive the applications, we'll do our merit review process and make our selections, and then start the Provider Recipient matching. So again, that's where we look at your applications and see your recommendations or your preferences on those Providers, and once the match is made we make sure the Providers, they have to agree to the match, and then we start a project kickoff session and get your project rolling. So we hope to do that in the September time frame. And that's all I had, I think. Next slide. And so I think we can go to Q&A.

Christi Pezzone 29:45

Perfect. Thank you so much, Cindy. We'll give Eli a quick second to pull up the Slido. As a reminder, please enter your questions via [slido.com](https://www.slido.com) using the code ICRSTIW2 or

use the link in the chat. And I'm going to turn it over to Eli and we're going to go through all of the questions.

Eli Huebner 30:04

Thank you. The first question: **is there a set of governing rules or required CFR provisions that Voucher Recipients must agree to in order to receive support? Is there an agreement template?**

Christi Pezzone 30:21

So the Recipients, I can go ahead and answer this one if that's okay. The Recipients only sign a Memorandum of Understanding with EnergyWerx, so there are not any requirements other than to participate with the Provider and make sure you're engaged in providing the information that they need so that they can help support you.

Eli Huebner 30:43

Thank you. **Can a National Lab be a Voucher Recipient?**

Cynthia Bothwell 30:52

To the extent that a national lab is a transmission provider for bulk power transmission systems, which may be the case in very limited circumstances, they could be a Recipient, but primarily they would have to be planning, owning, or operating bulk power transmission in the United States.

Eli Huebner 31:15

Thank you. **Rather than the proposal, are there any other requirements that should be submitted along with the application?**

Cynthia Bothwell 31:33

I kind of went over that on the one slide a few slides ago about what we expect in the application. So those things would include who your business is and then also you know, what staff you have to support the proposal and what data and models you have to support the proposal.

Eli Huebner 32:04

Thank you. **Are there any project reporting requirements for the Voucher Recipient, or is that solely the responsibility of the Voucher Provider?**

Cynthia Bothwell 32:21

Not back to DOE. After a selection is made, I'm thinking that's what this question is referring to. So yes, you'll just work with the Provider and the Provider has the reporting requirements back to EnergyWerx and then EnergyWerx to DOE.

Eli Huebner 32:42

Thank you. **Can a university receive a voucher?**

Cynthia Bothwell 32:50

I believe there are universities on our [capabilities Provider list](#). Yes. So then, yes, they would.

Eli Huebner 33:00

Thank you.

Cynthia Bothwell 33:00

If they get matched, if they get matched, I will say just because you're on the capability Provider list doesn't mean that you're guaranteed a match.

Eli Huebner 33:02

Can a university collaborate with one transmission provider, such as NYPA, to apply as a Voucher Recipient?

Cynthia Bothwell 33:27

Christi maybe help me there, but I think NYPA should apply as the Recipient. The university is not a transmission, unless the university is a transmission provider itself.

Christi Pezzone 33:33

Yeah, and, that is correct.

Cynthia Bothwell 33:42

Okay.

Eli Huebner 33:44

Thank you. Here we go. **Can you share the slides?**

Christi Pezzone 33:53

So the slides and the transcript and the recording will be posted to the [website](#) later today, early tomorrow, hopefully by the end of the day today. And then the Q&A will be posted as soon as we have that back from DOE. So the slides can be found on our website. They should be there by first thing tomorrow morning.

Eli Huebner 34:18

Thank you. **Can we still apply for the qualified service Providers?**

Cynthia Bothwell 34:27

Okay, I'm going to read this question as, can you apply to be a service Provider? And that opportunity, that part of the opportunity is closed already. Depending on the success of this first round, DOE may offer a second round and then you can watch EnergyWerx list for future solicitations. But at this point, we are closed to accepting Providers for this round.

Christi Pezzone 35:06

And I think that Julia just posted, no, I think Julia just posted in the chat the link to [join the EnergyWerx ecosystem](#). So, if there are future rounds for Providers, that distro list will be the first that will be notified of new opportunities.

Cynthia Bothwell 35:06

If I didn't, Okay, yeah. Okay, and I was just going to say, if I interpreted that question incorrectly, please rephrase it and add it, because that was my interpretation.

Eli Huebner 35:35

Thank you. **What is the length of these projects?**

Cynthia Bothwell 35:42

Currently up to two years, and that would be up to the Recipient and Provider to work on, but it's our intent that they would be completed within two years. That's why I wanted you to also indicate on your project description if you needed things more urgently for some current conditions.

Eli Huebner 36:08

Thank you. **Do all the technologies offered have to be field demonstrated?**

Cynthia Bothwell 36:18

I believe so, but you know, if you think there's something that is promising that you're really looking at, you know, you can apply. It doesn't cost anything to apply, and we could look at that and evaluate it. But it is our intent to have, you know, things that are ready to implement, to be available.

Eli Huebner 36:45

Thank you. **Are there any financial commitments needed from transmission companies?**

Cynthia Bothwell 36:55

Not as a Voucher Recipient.

Eli Huebner 36:59

Thank you. **Is there a minimum or maximum size of a project?**

Cynthia Bothwell 37:10

Well, it'll have to fit in, a project will have to fit in within the Voucher Provider's capabilities. So again, read carefully the capabilities. And I will mention there are several projects that have ranges. So if you look, for example, at dynamic line ratings, there's, I believe, 4 levels of that capability depending on the miles of line that you would like to try to implement dynamic line rating on. So make sure you're choosing the right capability that fits the project.

Eli Huebner 37:53

Thank you. **What about vendors like Siemens, GE, ABB? Do they qualify as Providers? If so, what exactly is needed from them?**

Cynthia Bothwell 38:09

I don't believe any of them applied as or were selected as capability Providers, so you'll have to look at the [Provider list](#). Since I don't think they're on our Provider list, then there's nothing needed from them.

Eli Huebner 38:35

Thank you. **To confirm that a university can only work as a Voucher Provider, and at this time, the program will not receive Provider applications, right?**

Cynthia Bothwell 38:47

That's correct. That's correct.

Eli Huebner 38:51

Thank you.

Christi Pezzone 38:54

All right, we're going to give it a couple more minutes to see if any other questions come in. I will start winding us down in case any don't come in and we can give everybody some time back this afternoon. So, all questions will be provided to DOE so they have the opportunity to provide any additional helpful information before we post them on the [Opportunity Page](#) as soon as we get those back from DOE.

Remember that all [submissions](#) are due no later than Thursday, June 18th, 2026 at 3:00 PM. If you have any issues with your application or have any questions that kind of come up after you've gone through everything from the webinar and start your application, please reach out to info@energywerx.org and we will get back to you with a response as soon as we can. As I said, after today, we will place a recording of today's webinar on our [Opportunity Page](#) as well as the slides briefed and the transcript. Those should be there by first thing tomorrow morning. Again, please reach out to info@energywerx.org if you have any questions, if anything comes up. It

does not look like we have any questions. Oh. We do have a question that just came in.

Eli Huebner 40:17

Are Voucher Recipients only eligible for one voucher?

Cynthia Bothwell 40:26

I believe that's correct, right, Christi? One application per.

Christi Pezzone 40:31

So in your application, you'll be able to submit multiple capabilities that you're interested in, but at this time, I think DOE is only doing one match per Recipient. So, Voucher Providers can have multiple Recipients, but Voucher Recipients will only be matched with one Provider at this time.

Eli Huebner 40:55

Thank you.

Christi Pezzone 41:00

Okay, so I think that is all of our questions. I wanted to thank everybody for your time here today. Thank you, Spencer and Cindy, for being here and for giving the very informational briefing and for answering all of the questions. And I also wanted to thank the EnergyWerx team for being here to support this webinar. And I hope that everyone has a great rest of their week and we look forward to seeing your application soon.

Cynthia Bothwell 41:30

Thanks, all.