2026-11-23 A+STEPS Regional Hubs IW1 Transcript

Christi Pezzone 0:10
Good afternoon, everybody. We're going to get started in just a couple of minutes here. I want to let everybody come in from the lobby, so if you just hold tight. Thank you for coming. We'll get started in just a few minutes here.

Welcome to those of you just joining us. We're going to get started in a couple of minutes. We're just letting everybody come in from the lobby before we get started. Thanks so much.

All right, let's go ahead and get started. Good afternoon, everyone, and welcome to our Affordability + Strategic Energy Pathways for Schools, or A+STEPS, Informational Webinar. My name is Christi Pezzone. I am the Deputy Director here at EnergyWerx.

Due to unforeseen circumstances, we will not be answering any questions live today, and we'll only be covering the overview of the program, which we will record and post. All questions that are asked will be sent over to DOE, and we will keep the Slido open until 4 o'clock this afternoon for questions. Before we get started, a couple of notes. No AI bots, so unfortunately, we're going to have to remove those or not admit them. Next slide, please.

So this is an Informational Session. The program office will address some questions afterwards before the next webinar, and then they will be posted on our website. You'll see the link and the QR code for our Slido application here. If you enter the code astepsiw1, that will take you to our Slido. Slido is a crowdsourcing tool where you can upvote questions. You can go ahead and look through everything that's already been asked, and if you have the same question, instead of asking it again, you can just give it a thumbs up and that'll bump it to the top. It'll be one of the first ones that DOE gets to respond to when they get the questions after we have completed everything. Like I said, the Q&A will be posted once DOE has had time to review and respond. That will be done before the next webinar.

I do want to address a couple of points really quick regarding some questions. Unfortunately, we cannot speak to specific solutions that may be of interest, and the separate Opportunity for LEAs is anticipated in Spring 2027. Today's webinar will focus on the Regional Hub portion of the Opportunity only, and those are the only questions that we will be answering as well afterwards. I also wanted to, because this might be some of your first time working with EnergyWerx, our agreements are business-to-business agreements. They are Firm Fixed Price. And how that works is the invoicing is results based. The invoicing will occur in arrears. There will be specific supporting documentation, for example, reports, having events, et cetera, but no time and personnel reporting, no itemized expenses, no travel, no indirect costs, et cetera, will need to be reported. So I just wanted to touch base on that really quick before we go ahead and get started.

I wanted to go over a few upcoming key dates while you all are going to visit the Slido to submit any questions that you might have as you're listening along. Applications will close on Thursday, January 21st, 2027 at 3:00 PM Eastern Time. We will be holding a second webinar on December 15th at 3:00 PM Eastern Time and a third webinar on January 7th, 2027 at 2:00 PM Eastern Time. If you have any application issues, please reach out to info@energywerx.org. Also, if you have any questions while you're going through your application or as you're doing research on the Opportunity, you can go ahead and reach out to us there, too, if you have questions after we finish up today. Next slide, please.

Moving on to the overview portion of the webinar, I'll be turning it over to Casey Thomas. Casey.

Casey Thomas 6:02
Thank you, Christi, and welcome, everyone. I'm Casey Thomas. I'm a project monitor supporting the Office of State and Community Energy Programs at the Department of Energy, or DOE. Later in the webinar, you'll hear from my colleague Derek Burke, as well as Cindy Regnier with the Lawrence Berkeley National Laboratory. Thanks for joining us today.

The webinar will focus on the Affordability and Strategic Energy Pathways for Schools, or A+STEPS program. This Opportunity is part of the U.S. Department of

Energy's Renew America's Schools Program. Today's webinar will focus, as Christi said, on the Regional Hub funding Opportunity, what the program is designed to accomplish, what Regional Hubs will be responsible for, and what prospective applicants should know as they prepare their submissions. Please note that this current funding Opportunity is not designed for schools or school districts. The funding Opportunity for schools will launch, as Christi mentioned, in Spring of 2027. We're glad to have you with us today. Next slide, please.

We'll begin today's webinar with a brief overview of Renew America's Schools and the thinking behind this latest funding Opportunity. Then we'll introduce A+STEPS, including the program objectives, the work Regional Hubs will carry out, and the funding structure for the program. We will share details about the program stakeholders and how they will work together to achieve the program objectives. After that, we'll turn to the application itself, including the required materials, eligibility criteria, review criteria, and key dates. Next slide, please.

To begin, it's useful to understand the need this program was created to address. Schools are the second largest public infrastructure sector in the country. There's an estimated $85 billion annual shortfall in maintenance and capital funding needed for school facilities nationwide. That figure speaks to the scale of the challenge facing K-12 schools, particularly facilities with significant needs and limited resources to address them.

The Bipartisan Infrastructure Law of 2021 provided $500 million in funding for energy improvements at public school facilities. With that funding, DOE's Office of State and Community Energy Programs launched the Renew America Schools Program to promote energy improvements at public K-12 schools across the country, lowering energy costs, improving air quality, and prioritizing schools most in need, enabling schools to focus more resources on student learning. The first funding Opportunity of the program was launched in 2022 with 24 applications selected. This first round was an opportunity to demonstrate the energy cost savings, improved conditions for students and teachers, and community benefit that could be achieved through energy upgrades at public school facilities. In 2024, DOE launched another round of funding in the form of a prize and grant Opportunity. This round provided initial funding for prize winners to invest in the planning and capacity building needed,

gathering a portfolio of 10 or more schools that were planning to implement energy upgrades, and assembling the team that would plan and implement those projects. 21 applications were selected for the prize, with 16 of those selectees moving from the prize to a cooperative agreement with DOE for large-scale energy upgrades. A+ STEPS is the 3rd and final funding Opportunity within this broader Renew America Schools program funded through the Bipartisan Infrastructure Law. Next slide, please.

With each round of Renew America Schools funding, a central question has helped shape the program development: How can we create approaches that are replicable, deliver strong economic benefits relative to the investment, and give schools a pathway they can continue to follow? This is especially important given the size and persistence of school facility needs. A single improvement project is valuable, but the broader challenge is helping school districts develop the ability to identify, prioritize, and advance projects over time. Since 2022, DOE has sought stakeholder feedback and adjusted the program in response to learnings from each round of funding.

A+STEPS is the next phase in that approach. It places particular emphasis on building capacity and creating practical pathways for districts to pursue energy improvements, including in circumstances where they are not relying on federal funding to move projects forward. The model of this final funding Opportunity is investing in regional capacity and infrastructure to support school districts beyond the Renew America Schools funding cycle. It is designed to support improvement projects in participating schools, and also to strengthen the pathways that make future projects possible for schools across the country. Next slide, please.

A+STEPS will award up to $100 million in project funding over three years to establish a nationally coordinated network of Regional Hubs and help school districts reduce operating costs, improve the reliability of essential building systems, and develop practical facility projects for financing and implementation. The Opportunity we're discussing today is specifically for organizations interested in serving as Regional Hubs. Under this funding Opportunity, annual awards of up to $5 million are available per Hub. Once the Regional Hubs have been selected and onboarded, DOE and EnergyWerx will offer an application process through which local education agencies, or LEAs, and schools can apply. The first round of the LEA and school application process is expected to open in Spring of 2027. For LEAs and schools

interested in receiving information about that application process, a link is available on the EnergyWerx Opportunity Page and on the slide here. Next slide, please.

A+STEPS has seven main objectives. First, the program emphasizes high-quality energy assessments so that planning is informed by up-to-date information about school facilities. Second, those assessments will lead to practical and actionable strategic energy plans for each participating school district. Third, A+STEPS supports the implementation of catalytic energy upgrade projects that represent the first stage of those strategic energy plans at school facilities. Fourth, it aims to establish durable regional technical assistance ecosystems so that expertise and assistance are available beyond a single project with participating school districts. The remaining objectives reinforce the quality and reach of that work, producing standardized, high-quality facility and project data prioritizing high-need school districts, and ensuring quality, independence, and accountability across the program. Next slide, please.

A+STEPS is organized around 7 regions, shown here on the map. These geographic regions provide the framework for the Regional Hub network. Applicants will need to identify which DOE-defined region their proposed Hub would serve. As you think about a proposed regional approach, keep the program's objectives in mind: reaching school districts with significant needs, delivering high quality assistance, and developing regional capacity that can support school facility improvements over time.

The program structure is regional by design. It is meant to pair nationally coordinated support with organizations that can plan around the unique circumstances and needs in their region. For applicants, this makes the proposed regional strategy an important part of the application. Next slide, please.

The next few slides will look more closely at what operating a Regional Hub involves. We recognize that a single organization is unlikely to have expertise across every one of these areas. That's why we encourage organizations to consider applying as a consortium or Hub team with one lead applicant and partner organizations bringing complementary experience and capabilities. Organizations interested in partnering to form a consortium can sign up for the Teaming Partner List on the EnergyWerx

Opportunity Page and find other partners interested in working in their proposed region. We will share more about the Teaming Partner List later in the presentation.

The first category of Regional Hub responsibilities is focused on management, administration, and planning. These responsibilities include developing a regional strategy, managing and reporting on the consortium, workforce development planning, conducting LEA and school outreach, developing a long-term continuation plan, and preparing for the Hub's ramp-up and wind-down periods. They also include financial management and internal controls, risk management, and safeguards for conflicts of interest. A Hub needs both the ability to provide meaningful assistance to districts and the administrative structure to organize, manage, and account for that work. As you consider a team, think not only about the technical services you could deliver, but also about how the proposed Hub would be managed and sustained. A proposal should make clear which organizations and staff would take responsibility for the different functions and how those responsibilities fit together. Next slide, please.

To drill down a bit, the ramp up period establishes the foundation for the work that follows. One major outcome for this period is developing a regional strategic plan to guide capacity building. This includes identifying regional barriers and resource needs, developing a capital planning strategy that provides for flexibility and responsiveness to LEA needs, assessing workforce training needs, preparing an LEA outreach plan, and considering long-term transition planning. At the same time, the Hub will need to establish its consortium and the management, financial, and other infrastructure necessary to operate effectively. During this time, the Hub will engage with our National Coordinator Team and with other Regional Hubs through peer exchanges. This includes collaborating on the identification of regional barriers, resources, and training needs, as well as participating in training and initial reporting related to a national school's performance database managed by the National Coordinator Team.

The ramp-up period is not only about getting a Regional Hub up and running, but also about understanding the regional context, building the working relationships and systems needed to serve LEAs, and preparing for consistent delivery of assistance across the program. This planning and infrastructure work sets the Hub up

to support LEAs effectively as their participation in the program begins. Next slide, please.

Alongside those program management functions, Regional Hubs will support participating school districts across 6 core areas. At the regional level, Hubs will provide broad technical assistance and workforce development support. At the individual district level, they'll offer hands-on support across 4 areas.
strategic energy planning, which includes data collection, energy assessments, energy conservation measure, or ECM, identification, and capital and implementation planning, along with supporting ECM implementation, monitoring and verification, and program reporting. The ECM identification is key and will include identifying the catalytic energy improvements that enable larger retrofit projects beyond those funded through Renew America's Schools. The catalytic energy improvement projects at schools will be funded through the LEA funding Opportunity and are not included in the Regional Hubs funding. The application should communicate how the proposed team would organize its expertise and approach to support participating districts across these different functions. That means considering the experience needed for direct technical assistance, as well as the people and processes needed for planning, reporting, and coordination. Next slide, please.

Now that we've covered the responsibilities of Regional Hubs, let's look at how the funding is structured to support that work. Regional Hub funding is organized around two primary components, which align with the responsibilities we just discussed. The first component supports management, administration, and planning activities. Each Regional Hub can receive up to $1.4 million in year one to support these functions, including establishing and managing the Hub, developing regional plans, and preparing to deliver services to participating school districts. The second component supports individualized assistance to LEAs. Funding for this work is structured at up to $200,000 per LEA served, with the individualized LEA support funding based on the anticipated number of LEAs served in that region, as shown on the slide. These 2 components are added together to determine each Regional Hub's maximum potential award. As you can see in the table, the anticipated number of LEAs served varies by region. As a result, the total funding available to each Regional Hub will vary based on the number of LEAs it is expected to support. Applicants may propose to serve more LEAs than the anticipated number shown here, however,

regional funding levels are not expected to increase substantially. The ability to successfully support additional LEAs while maintaining high-quality services will be considered a strength during application review. It's also important to distinguish this funding from the separate funding that participating LEAs will receive for their initial catalytic energy improvements. The funding we're discussing here is specifically intended to support the Regional Hubs in carrying out their responsibilities. With that funding structure in mind, I will now pass it over to my colleague, Cindy Regnier, to discuss the National Coordinator support that will be available to Regional Hubs as they carry out this work.

Cindy Regnier 20:06
Thanks, Casey. I'm Cindy Regnier from Lawrence Berkeley National Lab. Berkeley Lab and the National Lab of the Rockies are proud to co-lead the National Coordinator role, supported by other national labs. Our primary mission is to support the Regional Hubs in delivering high-quality, enduring assistance and workforce training to school districts nationwide. To do this, we'll facilitate collaboration and access to resources, including a centralized platform for sharing resources and best practices across regions. We'll also establish the National Schools Performance Database to standardize data collection and track impact. Our work will heavily leverage existing Department of Energy tools and research while conducting targeted limited research and workforce development training to extend technical support into new critical areas. Through shared tools, training modules, and technical resources, we aim to ensure these energy improvement pathways remain durable and sustainable long after the program concludes. We're excited to partner with you all. I'll now invite Derek to present the next slides on the application process. Next slide, please.

Derek Burke 21:16
Thank you, Cindy. Hi, everyone. My name is Derek Burke, and I am a project monitor supporting the Office of State and Community Energy Programs, and I will be taking you through the rest of the presentation. Now that we know more about the stakeholders, I will explain how the A+STEPS program is structured and how the major stakeholders of the program work together.

DOE leads the program and partners with EnergyWerx to implement the funding Opportunity. Selected Hubs will enter a business-to-business contract with

EnergyWerx and submit reports and invoices directly to them. DOE will also partner with the National Coordinator Team to support the cross-region infrastructure for the Hubs as they provide support for the LEAs. The Regional Hubs are positioned to deliver assistance directly to the participating LEAs. The LEAs will contract with EnergyWerx to participate in the program. The Regional Hubs will be providing the individualized support, including training, technical assistance, energy assessments, and strategic energy plans. These are meant to help districts understand their facilities, identify priorities, and prepare improvement projects that can move toward implementation.

After the initial assessments and planning are complete, EnergyWerx will provide up to $250,000 to each participating LEA for catalytic energy improvements. For Hub applicants, the key point is the direct service relationship with LEAs. Hubs are expected to bring together the expertise and organizational capacity needed to deliver that assistance while working with the National Coordinator. Next slide, please.

Now let's walk through the anticipated sequence of A+STEPS, beginning with the Regional Hub process. Regional Hub applications opened last week, and applications are due January 21st, 2027 at 3 PM Eastern Time. DOE anticipates selecting Regional Hubs by April of next year. In the Spring of 2027, the Regional Hubs are expected to begin their work, including the ramp-up activities described on a previous slide.
At the same time, the separate LEA application process is expected to open in the Spring of 2027. DOE will then select participating LEAs with LEA onboarding by the Fall of 2027. Hubs will work directly with the participating LEAs in their region to provide the individualized support described on the previous slide. Once LEA strategic energy plans have been developed, LEAs will receive up to $250,000 from EnergyWerx for catalytic energy improvement projects.

One additional point is important to remember here. DOE intends to run up to three LEA application cycles during the three-year Regional Hub period of performance. The exact dates of those cycles have not yet been determined. The main take away for prospective Hub applicants is that there is an initial period of Hub establishment and preparation followed by direct support to LEA's continued program activity over the Hub's period of performance. The Hub must be ready to set up the consortium

and regional support structure and then carry out the hands-on assistance described in the program objectives and Hub responsibility slides. Next slide, please.

Next, we'll move to the application requirements and how to apply. There are 6 main components to the application. First is the online application form on the EnergyWerx Opportunity Page. This is where you'll enter your organization's basic information and complete the required attestations. This is also where you'll upload all required attachments that make up the application package. Among those attachments is the project narrative. This is the heart of the application and should be no more than 10 pages, including the cover page. We have provided a template, but you are not required to use it. I go into more detail on the project narrative in the next slide. We also require a summary slide describing your team and your approach. Think of it as a snapshot for the reviewers. What makes your Hub strong and distinctive? Text needs to be at least 14 points so it can be easily read. Reviewers will evaluate one slide only. Do not include more than one slide. Applicants will provide letters of commitment from every partner organization on your Hub team, demonstrating their commitment to the proposed project plan. Applicants should provide resumes for key personnel, limited to two pages for each relevant member of the team. These resumes must be combined into one PDF. Finally, we have provided a space for letters of support, though these are not required. These letters of support can help demonstrate the regional buy-in for your application and project plan. Organizations that might be interested in submitting letters of support could include LEAs, state energy offices, state departments of education, and others. Please note that LEAs submitting a letter of support are not guaranteed selection or funding through A+STEPS, and no preference will be given during the LEA application review to organizations that submit letters of support during this phase. Next slide, please.

Now, let's take a closer look at the project narrative. Again, it's 10 pages total, including the cover page, and it's broken into three sections. The first section is the project description and approach. Start by telling us about your organizational background and experience in the region. Explain your regional strategy and how you'll engage LEAs, including high need and rural districts. We also want to know which funding and financing pathways the Hub will emphasize, the rationale for prioritizing them, and how they address LEA needs and regional conditions while positioning LEA projects to pursue non-DOE capital. Next, tell us about your plans for

technical assistance, training, and workforce development. Then walk us through how you'll support the LEAs to create individualized strategic energy plans and support LEAs as they implement catalytic energy improvements. Remember that an important objective of A+STEPS is to create durable regional technical assistance ecosystems. Include plans for how your Hub team's support for LEAs in the region will continue beyond the period of performance.

The second section is the work plan and budget. Lay out your plan to launch in year one, how you'll coordinate with DOE, EnergyWerx, and the National Coordinator, the risks you identify for your Hub, and how you'll use the funds to stand up Hub operations. Include a budget table and milestone tables. Make sure your budget shows your clear understanding of the funding structure.

The third section is project team. Tell us about your partners, what they bring, what parts of the region they cover, and your experience managing large, complex programs with many partners. This is not the resume section, just a brief description of your team and their experience. Whether you use the template or not, make sure you cover everything it asks for because that is what reviewers will be scoring.
Next slide, please.

If you're interested in applying but don't have a full team yet, a Teaming Partner List is a great place to start. As Casey mentioned earlier, a single organization is unlikely to have the expertise in every one of the Hub responsibilities across the region. Any organization that wants to be part of a Regional Hub can sign up using the link on this slide or on the EnergyWerx Opportunity Page and fill out a few questions to be put on the list. The list (Password is case sensitive: APLHUB) with every organization that has signed up and their responses can also be found on this slide and the Opportunity Page. We encourage everyone who wants to apply as a Hub leader to read through the list and find partners who can improve their application. We'll keep updating the list as new organizations sign up. And as of this morning, there are 181 organizations who have signed up to be either Hub leaders or part of a Hub team from all regions. Remember, only Hub leaders need to apply. Regional team members should not submit individual applications. Next slide, please.

There are four basic eligibility criteria. First, your application must be complete and

submitted by the deadline of 3:00 PM Eastern Time on January 21st, 2027. Second, organizations on the Hub team must be domestic entities. You can find more about this requirement on the Opportunity Page. Third, your application needs to name the DOE region you plan to serve. Those are the regions provided on a previous slide. Each application should identify only one region. If an organization is interested in serving more than one region, they must submit separate applications for each Regional Hub proposal. And 4th, a note about the national labs. Federally Funded Research and Development Centers, which include the national labs, can't lead a Regional Hub. However, they can still join as a partner or sub-recipient. But DOE won't fund them directly, and together their work can't be more than 10% of the project's total federal share. Next slide, please.

So, how will your application be scored? Every application that passes the initial eligibility screening will be evaluated against four key criteria, each carrying a different weight. The first criterion, technical approach and delivery quality, is worth 25%. Here, reviewers want to see a clear and actionable approach. How will you help school districts identify their facility and energy needs and turn those findings into strategic energy plans? How will you support catalytic energy improvements, commissioning, and data reporting? Applicants should also clearly identify the funding and financing pathways the Hub will prioritize, explain the rationale for those priorities, and demonstrate how these pathways address LEA needs and regional conditions while positioning LEA projects to pursue non-DOE capital. The key here is to demonstrate that you have a practical approach to moving districts from planning to implementation.

The second criterion, regional reach, technical assistance, and sustained capacity is worth 30%. This is the highest weighted criterion, so it's especially important. Reviewers want to know that you can effectively serve your entire region. That means demonstrating a strong understanding of the region, including the unique challenges faced by small and rural LEAs. It also means showing how you will deliver meaningful technical assistance, build training and workforce partnerships, and strengthen local capacity. Finally, we want to see a credible plan for sustaining Hub services and supporting districts beyond the initial funding cycle.

Third criteria, work plan, budget, milestones, and risk management is worth 20%. This is where reviewers evaluate your ability to deliver. We want to know if your plan for launching the Hub and implementing year one activities is realistic, and if your budget aligns with the number of LEAs you anticipate to serve. And have you identified the key risks in your region along with clear strategies to address them?

The 4th criterion, consortium composition and experience, is worth 25%. Reviewers will look at the qualifications of your lead organization and partners and whether you have the sufficient staff to deliver. Does your team have the necessary experience in school facility retrofits, technical assistance, workforce training, and school funding and financing? And for the Regional Hub leaders, do you have a proven ability to manage multi-partner programs across your region? A competitive application needs to demonstrate a strong technical strategy, prove that you can reach and support districts across your region, and present a realistic plan for execution, and show that you have the right partners and experience to deliver results. Next slide, please.

Finally, let's walk through the key dates moving forward for the first year of A+STEPS. Today's webinar is the first of three. The next two are December 15th at 3:00 PM Eastern and January 7th at 2:00 PM Eastern Time. Applications are due on January 21st, 2027 at 3:00 PM Eastern Time. Please don't wait until the last minute. We expect to select Regional Hubs in April of 2027. The application for school districts is expected to open in the Spring of 2027 with selected schools onboarding in the Fall. So, if you're with a school district, your turn to apply comes later, but you can sign up on the Opportunity Page to be notified when the application for schools is launched. I will now pass it back to Christi at EnergyWerx to close out the webinar.

Christi Pezzone 33:25

Thank you, Derek. As a reminder, please ask your questions that you might have after listening to everything today via slido.com using the code astepsiw1 or use the link in the chat. All questions will be provided to DOE so that they have the opportunity to provide a response before our next webinar. You can see QR codes on your screen and you'll also get links in the chat for our upcoming webinars. There is one on Tuesday, December 15th and Thursday, January 7th. You will also in the chat find our e-mail address if you have any additional questions. A link to the Opportunity Page, which is a great resource if you have some questions that you were hoping to get

answered right away. Also, you'll find links to join our ecosystem and follow us on social media. As a reminder, after today, we will be replacing this recording on our website as well as the transcript and a copy of the slides that were briefed today. Those will be on the Opportunity Page as well.

I'd like to thank everybody for participating in the A+STEPS Informational Webinar today. Especially thanks to DOE. Thank you for that great presentation. That definitely had a lot of great information in it that I think will be very helpful to potential applicants. And I also wanted to thank the EnergyWerx team for being here and running everything today behind the scenes. We hope to see you at the next Informational Webinar. Have a great Thanksgiving and have a great rest of your week. Bye.