

**Exhibit A  
SCOPE OF WORK**

**TECHNICAL TASK LIST**

<b>Task #</b>	<b>CPR</b>	<b>Task Name</b>
1	N/A	Administration
2		Development of California's Smart Grid Vision of 2020
3		Current State Assessment
4		Smart Grid Standards, Technologies, and Vendors Assessment
5	X	Costs Benefits Analysis
6		Technology Roadmap
7		Implementation / Deployment Plan

**KEY NAME LIST**

<b>Task #</b>	<b>Key Personnel</b>	<b>Key Subcontractor(s)</b>	<b>Key Partner(s)</b>
1	Steve Rupp Bob Kinsella		
2	Steve Rupp Bob Kinsella James McCall Jessyka Platt		
3	Steve Rupp Bob Kinsella Steve Hadden Jessyka Platt		
4	Bob Kinsella Steve Hadden Dave Scott Jessyka Platt		
5	Steve Rupp Jessyka Platt Dave Scott Walter Levesque		
6	James McCall Steve Rupp Bob Kinsella Jessyka Platt		
7	Steve Rupp Bob Kinsella		

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
	Jessyka Platt Dave Scott		

## GLOSSARY

Specific terms and acronyms used throughout this work statement are defined as follows:

Acronym	Definition
ARRA	American Recovery and Reinvestment Act
CMF	Comparative Matrix Framework
CPR	Critical Project Review
DOE	United States Department of Energy
Energy Commission	California Energy Commission
GHG	Green House Gas
NCPA	Northern California Public Power Agency
POU	Publicly Owned Utility
SGMM	Smart Grid Maturity Model
SCPPA	Southern California Public Power Authority
UCC.1	Uniform Commercial Code (Financing Statement)

## Problem Statement

Implementation of Smart Grid technologies and initiatives has the potential to enable California to achieve its planned reduction in greenhouse gas emissions, allow it to increase the use of renewable energy sources, provide for increased energy efficiency, enable increased energy conservation, reduce the cost of energy, and provide a reliable and secure energy infrastructure. A better understanding is needed of how smart grid technologies should be deployed, what technological advances need to occur, and what are the associated costs and benefits. Furthermore, it is essential to look at these questions from the perspective of both the suppliers and consumers of energy. In California, the suppliers consist of the Investor Owned Utilities and the Publicly Owned Utilities (POUs), which both have a unique perspective on the Smart Grid.

POUs have a unique perspective on these questions for a number of reasons, including:

- They are governed and regulated by officials elected from the communities in which they serve. Their owners, their board members, their managers and their employees are typically also the ratepayers. For these utilities nothing is as important as keeping their rates low, their quality of service high and their operating principles a reflection of the communities they serve.
- They are at various stages of Smart Grid deployment. Some are already relying on Smart Grid technologies, others are getting ready to and some others may not get there by 2020.

- They are customer-owned and there is no sharing of risk among regulators, shareholders and ratepayers – the ratepayers take 100 percent of the risk of every decision their utility boards and managers make.
- Their decisions are shaped by local governance and control and a utility charter or ordinance generally dictates how they operate. POU's will prefer guidelines in which they can make their own rules and set their own priorities that will reflect their customer owners.
- They are different from one another. Some are divisions or departments of city government. Some are municipal districts that cross political boundaries. Some serve millions of customers, others only a few thousand. Some serve more electricity than water, others more water than electricity and even a few provide water, electricity, gas, telephone, internet access and cable television. And given that the Smart Grid promises some value to all of these utility services, the perspective on that value varies.

Developing a shared vision of the Smart Grid from the perspective of the state's POU's will be challenging. The vision needs to be broad without losing its focus. The pathway to achieving that vision has to have room for both leaders and followers. The methods for evaluating technologies and assessing costs and benefits must be flexible enough to address a wide range of services and yet be practical in their balance of complexity and transparency. Throughout the process of developing a roadmap to achieving a vision for the smart grid, the guiding principal for making important choices has to be based on an open and highly collaborative and inclusive process.

### **Goals of the Agreement**

The goals of this Agreement are to:

- Develop a broadly understood and supported Smart Grid 2020 vision for California's POU's
- Develop a standardized approach and pathway into California's Smart Grid future, specifically in the POU domain
- Create a Smart Grid Technology Roadmap for California with identified technology and business gaps that are required to meet the Smart Grid Vision of 2020.
- Develop implementation pathways and plans to bring the Technology Roadmap to fruition.

### **Objectives of the Agreement**

The objectives of this Agreement are to:

- Define the elements of Smart Grid for California in 2010 and 2020
- Identify key Smart Grid drivers, including the top California energy policy goals
- Define the appropriate codes, standards, and protocols for the Smart Grid
- Identify critical Smart Grid technologies and use cases to understand the applications of these technologies in 2020
- Identify and quantify potential costs and benefits for the prospective Smart Grid 2010 and 2020
- Develop a Technology Roadmap to meet 2020 Vision

- Provide an implementation schedule of activities required for all technologies defined in the Smart Grid 2020

The project will answer the following questions:

- What is California's future Smart Grid Vision of 2020?
- What is the current state of California's Smart Grid initiatives, the gaps and critical barriers required to be overcome to meet future state goals?
- What does the Technology Roadmap look like for California to meet its Smart Grid vision in 2020?
- How does California compare to other regional Smart Grid adopters?
- Where and how is California performing in relation to its Smart Grid energy policy goals?
- How do California POU Smart Grid initiatives compare (performance, technology, market position, consumer initiatives. etc.)?
- What is the current state of Smart Grid technology available (market position, what's working, what is failing, industry leaders, etc.)? In 2020? What technology is most cost-effective?

## **TASK 1.0 ADMINISTRATION**

### **MEETINGS**

#### **Task 1.1 Attend Kick-off Meeting**

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

#### **The Contractor shall:**

- Attend a "kick-off" meeting with the California Energy Commission (Energy Commission) Contract Manager, the Contracts Officer, and a representative of the Accounting Office. The Contractor shall bring their Project Manager, Contracts Administrator, Accounting Officer, and others designated by the Commission Contract Manager to this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting. Prior to the kick-off meeting, the Commission Contract Manager will provide an agenda to all potential meeting participants.

The administrative portion of the meeting shall include, but not be limited to, the following:

- Terms and conditions of the Agreement
- CPRs (Task 1.2)
- Match fund documentation (Task 1.7)
- Permit documentation (Task 1.8)

The technical portion of the meeting shall include, but not be limited to, the following:

- The Commission Contract Manager's expectations for accomplishing tasks described in the Scope of Work;
- An updated Schedule of Deliverables
- An updated Gantt Chart
- Progress Reports (Task 1.4)
- Technical Deliverables (Task 1.5)
- Final Report (Task 1.6)

The Commission Contract Manager shall designate the date and location of this meeting.

**Contractor Deliverables:**

- An Updated Schedule of Deliverables
- An Updated Gantt Chart
- An Updated List of Match Funds
- An Updated List of Permits

**Commission Contract Manager Deliverables:**

- Final Report Instructions

**Task 1.2 CPR Meetings**

The goal of this task is to determine if the project should continue to receive Energy Commission funding to complete this Agreement and if it should, are there any modifications that need to be made to the tasks, deliverables, schedule or budget.

CPRs provide the opportunity for frank discussions between the Energy Commission and the Contractor. CPRs generally take place at key, predetermined points in the Agreement, as determined by the Commission Contract Manager and as shown in the Technical Task List above and in the Schedule of Deliverables. However, the Commission Contract Manager may schedule additional CPRs as necessary, and any additional costs will be borne by the Contractor.

Participants include the Commission Contract Manager and the Contractor, and may include the Commission Contracts Officer, the PIER Program Team Lead, other Energy Commission staff and Management as well as other individuals selected by the Commission Contract Manager to provide support to the Energy Commission.

**The Commission Contract Manager shall:**

- Determine the location, date and time of each CPR meeting with the Contractor. These meetings generally take place at the Energy Commission, but they may take place at another location.
- Send the Contractor the agenda and a list of expected participants in advance of each CPR. If applicable, the agenda shall include a discussion on both match funding and permits.

- Conduct and make a record of each CPR meeting. One of the outcomes of this meeting will be a schedule for providing the written determination described below.
- Determine whether to continue the project, and if continuing, whether or not to modify the tasks, schedule, deliverables and budget for the remainder of the Agreement, including not proceeding with one or more tasks. If the Commission Contract Manager concludes that satisfactory progress is not being made, this conclusion will be referred to the Energy Commission's Research, Development and Demonstration Policy Committee for its concurrence.
- Provide the Contractor with a written determination in accordance with the schedule. The written response may include a requirement for the Contractor to revise one or more deliverable(s) that were included in the CPR.

**The Contractor shall:**

- Prepare a CPR Report for each CPR that discusses the progress of the Agreement toward achieving its goals and objectives. This report shall include recommendations and conclusions regarding continued work of the projects. This report shall be submitted along with any other deliverables identified in this Scope of Work. Submit these documents to the Commission Contract Manager and any other designated reviewers at least 15 working days in advance of each CPR meeting.
- Present the required information at each CPR meeting and participate in a discussion about the Agreement.

**Contractor Deliverables:**

- CPR Report(s)
- CPR deliverables identified in the Scope of Work

**Commission Contract Manager Deliverables:**

- Agenda and a List of Expected Participants
- Schedule for Written Determination
- Written Determination

### **Task 1.3 Final Meeting**

The goal of this task is to closeout this Agreement.

#### **The Contractor shall:**

- Meet with the Energy Commission to present the findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement.

This meeting will be attended by, at a minimum, the Contractor, the Commission Contracts Officer, and the Commission Contract Manager. The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be two separate meetings at the discretion of the Commission Contract Manager.

The technical portion of the meeting shall present findings, conclusions, and recommended next steps (if any) for the Agreement. The Commission Contract Manager will determine the appropriate meeting participants.

The administrative portion of the meeting shall be a discussion with the Commission Contract Manager and the Contracts Officer about the following Agreement closeout items:

- What to do with any state-owned equipment (Options)
  - Need to file UCC.1 form re: Energy Commission's interest in patented technology
  - Energy Commission's request for specific "generated" data (not already provided in Agreement deliverables)
  - Need to document Contractor's disclosure of "subject inventions" developed under the Agreement
  - "Surviving" Agreement provisions, such as repayment provisions and confidential deliverables
  - Final invoicing and release of retention
- Prepare a schedule for completing the closeout activities for this Agreement.

#### **Deliverables:**

- Written documentation of meeting agreements and all pertinent information
- Schedule for completing closeout activities

### **REPORTING**

**See Exhibit D, Reports/Deliverables/Records.**

### **Task 1.4 Monthly Progress Reports**

The goal of this task is to periodically verify that satisfactory and continued progress is

made towards achieving the research objectives of this Agreement.

**The Contractor shall:**

- Prepare progress reports which summarize all Agreement activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due to the Commission Contract Manager within 10 working days after the end of the reporting period. Attachment A-2, Progress Report Format, provides the recommended specifications.

**Deliverables:**

- Monthly Progress Reports

**Task 1.5 Test Plans, Technical Reports and Interim Deliverables**

The goal of this task is to set forth the general requirements for submitting test plans, technical reports and other interim deliverables, unless described differently in the Technical Tasks. When creating these deliverables, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Contract Manager, the latest version of the PIER Style Manual published on the Energy Commission's web site:

<http://www.energy.ca.gov/contracts/pier/contractors/>

**The Contractor shall:**

- Unless otherwise directed in this Scope of Work, submit a draft of each deliverable listed in the Technical Tasks to the Commission Contract Manager for review and comment in accordance with the approved Schedule of Deliverables. The Commission Contract Manager will provide written comments back to the Contractor on the draft deliverable within 10 working days of receipt. Once agreement has been reached on the draft, the Contractor shall submit the final deliverable to the Commission Contract Manager. The Commission Contract Manager shall provide written approval of the final deliverable within 5 working days of receipt. Key elements from this deliverable shall be included in the Final Report for this project.

**Task 1.6 Final Report**

The goal of this task is to prepare a comprehensive written Final Report that describes the original purpose, approach, results and conclusions of the work done under this Agreement. The Commission Contract Manager will review and approve the Final Report. The Final Report must be completed on or before the termination date of the Agreement. When creating these deliverables, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Contract Manager, the latest version of the PIER Style Manual published on the Energy Commission's web site:

<http://www.energy.ca.gov/contracts/pier/contractors/>

The Final Report shall be a public document. If the Contractor has obtained confidential status from the Energy Commission and will be preparing a confidential version of the Final Report as well, the Contractor shall perform the following subtasks for both the public and confidential versions of the Final Report.

### **Task 1.6.1 Final Report Outline**

#### **The Contractor shall:**

- Prepare a draft outline of the Final Report.
- Submit the draft outline of Final Report to the Commission Contract Manager for review and approval. The Commission Contract Manager will provide written comments back to the Contractor on the draft outline within 10 working days of receipt. Once agreement has been reached on the draft, the Contractor shall submit the final outline to the Commission Contract Manager. The Commission Contract Manager shall provide written approval of the final outline within 5 working days of receipt.

#### **Deliverables:**

- Draft Outline of the Final Report
- Final Outline of the Final Report

### **Task 1.6.2 Final Report**

#### **The Contractor shall:**

- Prepare the draft Final Report for this Agreement in accordance with the approved outline.
- Submit the draft Final Report to the Commission Contract Manager for review and comment. The Commission Contract Manager will provide written comments within 10 working days of receipt.

Once agreement on the draft Final Report has been reached, the Commission Contract Manager shall forward the electronic version of this report for Energy Commission internal approval. Once the approval is given, the Commission Contract Manager shall provide written approval to the Contractor within 5 working days.

- Submit one bound copy of the Final Report with the final invoice.

#### **Deliverables:**

- Draft Final Report
- Final Report

## **MATCH FUNDS, PERMITS, AND ELECTRONIC FILE FORMAT**

### **Task 1.7 Identify and Obtain Matching Funds**

The goal of this task is to ensure that the match funds planned for this Agreement are obtained for and applied to this Agreement during the term of this Agreement.

The costs to obtain and document match fund commitments are not reimbursable through this Agreement. While the PIER budget for this task will be zero dollars, the Contractor may utilize match funds for this task. Match funds shall be spent concurrently or in advance of PIER funds during the term of this Agreement. Match funds must be identified in writing, and the associated commitments obtained before the Contractor can incur any costs for which the Contractor will request reimbursement.

#### **The Contractor shall:**

- Prepare a letter documenting the match funding committed to this Agreement and submit it to the Commission Contract Manager at least 2 working days prior to the kick-off meeting:
  1. If no match funds were part of the proposal that led to the Energy Commission awarding this Agreement and none have been identified at the time this Agreement starts, then state such in the letter.
  2. If match funds were a part of the proposal that led to the Energy Commission awarding this Agreement, then provide in the letter:
    - A list of the match funds that identifies the:
      - Amount of each cash match fund, its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied.
      - Amount of each in-kind contribution, a description, documented market or book value, and its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Contractor shall identify its owner and provide a contact name, address and telephone number, and the address where the property is located.
    - A copy of the letter of commitment from an authorized representative of each source of cash match funding or in-kind contributions that these funds or contributions have been secured.
- Discuss match funds and the implications to the Agreement if they are significantly reduced or not obtained as committed, at the kick-off meeting. If applicable, match

funds will be included as a line item in the progress reports and will be a topic at CPR meetings.

- Provide the appropriate information to the Commission Contract Manager if during the course of the Agreement additional match funds are received.
- Notify the Commission Contract Manager within 10 working days if during the course of the Agreement existing match funds are reduced. Reduction in match funds may trigger an additional CPR.

**Deliverables:**

- A letter regarding Match Funds or stating that no Match Funds are provided
- Letter(s) for New Match Funds
- A copy of each Match Fund commitment letter
- Letter that Match Funds were Reduced (if applicable)

**Task 1.8 Identify and Obtain Required Permits**

The goal of this task is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track.

Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement. While the PIER budget for this task will be zero dollars, the Contractor shall show match funds for this task. Permits must be identified in writing and obtained before the Contractor can incur any costs related to the use of the permits for which the Contractor will request reimbursement.

**The Contractor shall:**

- Prepare a letter documenting the permits required to conduct this Agreement and submit it to the Commission Contract Manager at least 2 working days prior to the kick-off meeting:
  1. If there are no permits required at the start of this Agreement, then state such in the letter.
  2. If it is known at the beginning of the Agreement that permits will be required during the course of the Agreement, provide in the letter:
    - A list of the permits that identifies the:
      - Type of permit
      - Name, address and telephone number of the permitting jurisdictions or lead agencies
    - Schedule the Contractor will follow in applying for and obtaining these permits.

- The list of permits and the schedule for obtaining them will be discussed at the kick-off meeting, and a timetable for submitting the updated list, schedule and the copies of the permits will be developed. The implications to the Agreement if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in the progress reports and will be a topic at CPR meetings.
- If during the course of the Agreement additional permits become necessary, then provide the appropriate information on each permit and an updated schedule to the Commission Contract Manager.
- As permits are obtained, send a copy of each approved permit to the Commission Contract Manager.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the Commission Contract Manager within 5 working days. Either of these events may trigger an additional CPR.

**Deliverables:**

- A letter documenting the Permits or stating that no Permits are required
- Updated list of Permits as they change during the Term of the Agreement
- Updated schedule for acquiring Permits as it changes during the Term of the Agreement
- A copy of each approved Permit

**Task 1.9 Electronic File Format**

The goal of this task is to unify the formats of electronic data and documents provided to the Energy Commission as contract deliverables. Another goal is to establish the computer platforms, operating systems and software that will be required to review and approve all software deliverables.

**The Contractor shall:**

- Deliver documents to the Commission Contract Manager in the following formats:
  - Data sets shall be in Microsoft (MS) Access or MS Excel file format.
  - PC-based text documents shall be in MS Word file format.
  - Documents intended for public distribution shall be in PDF file format, with the native file format provided as well.
  - Project management documents shall be in MS Project file format.
- Request exemptions to the electronic file format in writing at least 90 days before the deliverable is submitted.

**Deliverables:**

- A letter requesting exemption from the Electronic File Format (if applicable)

## **TECHNICAL TASKS**

The Contractor shall prepare all deliverables in accordance with the requirements in Task 1.5. Deliverables not requiring a draft version are indicated by marking “(no draft)” after the deliverable name.

### **Task 2.0 - Development of California’s Smart Grid Vision of 2020**

The goal of this Task is to create a well defined, broad-based future vision for a Smart Grid vision for California in 2020 that clearly defines California’s objectives. The development of this vision will take place through a process of developing and presenting an evaluation model and proposed Smart Grid vision which will be refined and eventually finalized through a highly collaborative stakeholder process.

#### **The Contractor shall:**

- Develop a draft vision – To set the stage for a collaborative vision development process, the stakeholders will prepare a document to serve as a guideline for the development of defined vision of California’s Smart Grid in 2020 representing the POU perspective. The draft document will establish the following foundational elements:
  - Legal, regulatory and local policies driving Smart Grid development
  - Existing perspectives of the future Smart Grid
  - Situational assessment unique to the POU community
- Distribute draft vision for review and comment – To garner input from the POU community, the draft visioning document will be widely distributed to POU representatives for review and comment. As needed, the project team will avail itself to reviewers to provide any requested clarification, guidance, correction and other input as may be needed to develop a highly representative POU vision of the future Smart Grid.
- Facilitate visioning workshop – The project team will facilitate a Smart Grid visioning meeting, to gain a clear and detailed insight into California’s Smart Grid vision and planned initiatives and develop a shared understanding of California’s future state in 2020. This effort will begin with the discussion of California’s desired future state required to meet its Smart Grid vision and determine where POUs see themselves 10 years from now. The discussion will be guided by the project plan and draft vision statement presented to the stakeholders for review and comment prior to the workshop. This process will serve as the foundation in developing characteristics and milestones for the technology roadmap.
- Develop final project plan and vision statement – After the conclusion of the first stakeholder workshop, a final project plan and vision statement will be prepared. A draft final document will be circulated to the Energy Commission Contract Manager and stakeholders for review and comment, after which it will be finalized and published.

#### **Deliverables:**

- Draft Project Plan and Vision Statement
- Final Project Plan and Vision Statement

### **Task 3.0 - Current State Assessment**

The objective of this task is to develop and apply a framework to assess current Smart Grid initiatives from the POU perspective. The basis for the assessment framework will be the Contractor's Competitive Matrix Framework (CMF). This is an effective means for developing quantitative and qualitative understanding Smart Grid strategies and initiatives.

#### **The Contractor shall:**

- Modify the CMF to address POU specific aspects of Smart Grid initiatives
- Prepare and administer surveys of POU stakeholders to establish status of ongoing Smart Grid initiatives
- Integrate survey results into the CMF and feed the results back to stakeholders for review and comment
- Prepare gap analysis with input from POU stakeholders

#### **Deliverables:**

- CMF Framework (no draft)
- Participant survey (no draft)
- Survey results (no draft)
- Gap Analysis (no draft)

### **Task 4.0 – Smart Grid Standards, Technologies, and Vendors Assessment**

The project team will develop an assessment of Smart Grid standards, technologies and vendors that will complement the Smart Grid initiatives assessment completed in the Task 3. The purpose of the assessment is to identify and understand the significant standards and technology advancements that must be considered in order to achieve the POU 2020 Smart Grid vision. The assessment will look broadly at the key standards and technologies that are required for implementing Smart Grid functionality and interoperability. The assessment will also look at the vendors that develop, build and install Smart Grid technologies to provide a perspective on where technology providers are currently situated in the Smart Grid Maturity Model (SGMM) and where they will have to be to accomplish the 2020 vision of the Smart Grid.

#### **The Contractor shall:**

- Develop, identify and define use cases to identify the primary standards, systems and technologies needed to achieve the POU 2020 Smart Grid vision
- Apply assessment SGMM framework to develop assessments of existing and required future standards, technologies and vendors
- Prepare a SGMM framework and assessment results paper for review and comment by stakeholders.

#### **Deliverables:**

- Use Cases (no draft)
- SGMM Framework and Assessment Paper (no draft)

### **Task 5.0 – Costs Benefits Analysis**

The objective of this task is to develop a framework for the economic evaluation of costs and benefits of Smart Grid applications. The framework will serve as a guideline that will provide a starting point for POU's to conduct more detailed assessments of their specific initiatives and will provide a broad analysis of primary Smart Grid applications. The cost benefit framework will be a high-level analysis of relevant Smart Grid systems and applications presented in the context of California's energy policies and public utility drivers.

#### **The Contractor shall:**

- Identify and describe significant costs and benefits of the key Smart Grid technologies identified in the preceding task.
- Present a broad methodology for evaluating Smart Grid costs and benefits suitable for POU's to use as a starting point for their own detailed analysis of specific applications.
- Identify Smart Grid risks and appropriate mitigation strategies
- Prepare a report of the cost benefit framework and solicit POU review and comment
- Participate in CPR as per Task 1.2

#### **Deliverables:**

- Cost-benefit framework of key Smart Grid use cases (no draft)
- CPR Report

### **Task 6.0 – Technology Roadmap**

To define the key milestones in achieving the 2020 vision of the Smart Grid, the project team will work with the POU stakeholders to develop a series of technology roadmaps. First, a high-level roadmap focusing on the broad platforms of policies, standards, technology and customer behavior will be developed. Based on the preceding gap analyses and vision development efforts, the key milestones will be identified and mapped across time by each platform. For the most significant or important platforms, additional detailed roadmaps will be developed to explore issues and objectives.

#### **The Contractor shall:**

- Develop draft primary technology roadmap based on developed Vision of 2020, Current State Assessment, Gap Analysis, Technology Assessment, Smart Grid Cost Benefit Analysis and Risk Assessment.
- Develop up to nine draft detailed technology roadmaps that will explore issues and objectives for the most significant and/or important platforms.
- Facilitate second stakeholders workshop to solicit review and input from project stakeholders and revise roadmaps accordingly

#### **Deliverables:**

- Draft primary technology roadmap

- Draft detailed technology roadmaps
- Final primary technology roadmap
- Final detailed technology roadmaps

### **Task 7.0 – Implementation Plan**

The project team will develop an implementation plan that reflects the perspective of the POU's in achieving the 2020 Smart Grid vision. The implementation plan is intended to be comprehensive in scope and as detailed as needed to convey the significant objectives and schedule parameters that must be accomplished to achieve the desired 2020 Smart Grid vision.

#### **The Contractor shall:**

- Develop an implementation plan to include but not be limited to the following elements:
  - Schedule of key milestones defined in the preceding technology roadmaps.
  - Potential strategies and approaches for implementation
  - Business case model on which the development of specific business cases can be based
  - Communication strategies addressing consumer, media and regulatory communications needs
  - Requirements for training plans for POU's and their customers
  - Requirements for security assessment in the context of implementation planning
  - Requirements for functional specifications, technology assessments and procurement planning for Smart Grid systems
  - Strategies for Smart Grid system implementation proposal evaluation and vendor selection
  - Requirements and strategies for system commissioning and acceptance
  - Strategies for Smart Grid asset management
  - Potential project management methodologies including project management requirements, program governance plan needs, progress reporting plan approaches, business strategy options to align technology roadmap and vision, and discuss objectives for managing risks around the financial, regulatory, security, technology, and customer/stakeholder engagement issues that could be faced in deployment
- Conduct the final stakeholders workshop to solicit input for the final implementation plan.

#### **Deliverables:**

- Implementation Plan
-