

**Exhibit A  
SCOPE OF WORK**

**TECHNICAL TASK LIST**

<b>Task #</b>	<b>CPR</b>	<b>Task Name</b>
1	N/A	Administration
2		Research Planning
3		Provide Expert Technical Review and Guidance
4		Outreach and Technology Transfer
5		Seek Co-funding Opportunities
6		Project Technical Review

**KEY NAME LIST**

<b>Task #</b>	<b>Key Personnel</b>	<b>Key Subcontractor(s)</b>	<b>Key Partner(s)</b>
1-6	Merwin Brown	N/A	N/A

**GLOSSARY**

<b>Acronym</b>	<b>Definition</b>
BPA	Bonneville Power Administration
CAISO	California Independent System Operator
CHP	Combined Heat and Power
CIEE	California Institute for Energy and Environment
CPR	Critical Project Review
DG	Distributed Generation
DOE	Department of Energy
Energy Commission	California Energy Commission
EV	Electric Vehicle
MS	Microsoft
MW	Megawatt
PIER	Public Interest Energy Research
RESCO	Renewable Energy Secure Community
RD&D	Research, Development, and Demonstration

**Problem Statement**

The California Energy Commission (Energy Commission) needs assistance in preparing the Renewable Energy Plan as specified in Governor Brown's Clean Energy Jobs Plan. This plan calls for adding 20,000 megawatt (MW) of new renewables including 12,000 MW of distributed generation and 8,000 MW of utility scale power by 2020. It also includes the development of energy storage with a rough goal that utilities procure storage equivalent to 5% of their peak load demand. The Clean Energy Jobs Plan also

includes planning for net zero buildings, and increasing CHP (combined heat and power) by 6,500 MW over the next 20 years.

Since the electric grid is an integral part of each of these plan objectives listed above, their timely success is tied to the research needed for new electric transmission and distribution technologies. The electric distribution system is especially in need of new technologies for the successful integration of renewable distributed generation.

Over the next few years, related “game changer” Energy Commission” initiatives, such as, Renewable Energy Secure Communities (RESCO), Renewable Distributed Generation, Federal Department of Defense Microgrids, and others, will also require technical support.

## **Background**

Under previous Energy Commission contracts, The Regents of the University of California, California Institute for Energy and Environment (CIEE) management provided support for the Energy Commission’s Public Interest Energy Research (PIER) effort to enhance the capability of California’s electric transmission and distribution system.

## **Goals of the Agreement**

The goal of this Agreement is to provide support to the Energy Commission for California’s renewable energy deployment policies. Primary focus is providing support in the areas of:

- Electric transmission and distribution grid
- Renewable utility-scale and distributed generation,
- Technical challenges associated with renewable technologies,
- Renewable energy resource mapping and assessment of renewable energy resources,
- Costs associated with renewable energy systems,
- Implications of energy storage, demand response, distributed generation, electric vehicle (EV) charging, and other technologies or practices for meeting California’s energy policy goals.

The Contractor will provide support by:

- Provide support in preparing feasibility studies. A feasibility study is a summary report that provides sufficient information to make informed decisions about further pursuit of a proposed project. The informational content will be under the direction of the Commission Contract Manager and may include, but not be limited to: energy resources; energy resource and energy demand compatibility assessment; technology assessment; lab and field testing, economic and financial analysis; institutional considerations; and time schedules.
- Provide facilitation and support services to develop outreach strategies, market and disseminate information highlighting specific project results to identified audiences. Coordination and support tasks include writing descriptive and

technical material, producing or utilizing graphics, and coordinating with appropriate outlets for targeted distribution of information.

- Assist staff in the development and design of materials needed for workshops, press conferences, reports, case studies, for distribution to general and technical audiences. Provide word processing, writing, editing, graphic design, spreadsheet analysis and presentation, database analysis and presentation, photographic services and printing services.
- Assist staff in technical writing and editing needed for a wide range of program materials including presentation materials, reports, brochures, fact sheets, and newsletter articles.
- Developing and updating research plans, "white papers," and candidate research activity portfolios for Research, Development and Demonstration (RD&D) of new technologies for electric transmission and distribution, including smart grid
- Providing technical expertise for review and guidance for selected PIER grid projects, and coordination and collaboration across multiple projects
- Conduct workshops and other outreach activities that seek comments from relevant individuals, industries and organizations for purposes of planning, designing, developing, implementing, administering, evaluating and coordinating selected programs.
- Developing methods for, and conduct of, technology transfer and outreach to California Stakeholders and ratepayers to maximize the implementation of the research products throughout California
- Providing coordination and collaboration with other organizations involved in PIER research, design, planning, and operations
- Identifying and cultivating co-funding opportunities for PIER research.
- Arrange and provide conference facilities, logistics, meeting facilitation, and supplies for conferences, workshops, review sessions, and other activities to improve information transfer between industry groups, energy firms, small businesses, local governments, and the Energy Commission.
- Identifying and documenting tangible benefits to ratepayers

### **Objectives of the Agreement**

The objectives of this Agreement are to:

- Develop and update research plans, "white papers," and candidate research activity portfolios for Research, Development and Demonstration (RD&D) of new technologies for electric transmission and distribution, including smart grid
- Provide technical expertise for review and guidance for selected PIER grid projects, and coordination and collaboration across multiple projects
- Develop methods for, and conduct of, technology transfer and outreach to California Stakeholders and ratepayers for projects
- Provide coordination and collaboration with other organizations involved in PIER research
- Identify and cultivate co-funding opportunities for PIER research
- Identify and document tangible benefits to ratepayers of PIER research

## **Work Guarantee**

All members of the Contractor team, including employees of the Contractor, are eligible to perform and may be assigned technical work. However, there is no guarantee that work will be required in all areas, or that every person or firm listed in this Agreement will receive work during the Agreement period. Additional people or firms may be added during the course of this Agreement, if necessary, upon approval by the Energy Commission staff.

## **Work Authorizations**

This is a "Work Authorization" Agreement. No work other than that described in Task 1 (Contract Management and Administrative duties) shall be undertaken unless authorized by the Energy Commission through a specific written document called a "Work Authorization". The Contract Manager will prepare and issue the written work authorizations that define the scope of work, the schedule of deliverables and the project budget. Final assignment of tasks and maximum payment on individual projects will be described in work authorizations signed by the Contractor and Energy Commission's Contract Manager.

To ensure the timeliness and success of all work performed under this Agreement, the Contract Manager will work closely with the Contractor to administer the Agreement, and a staff person will be assigned as a Work Authorization Manager to direct and review the work of assigned contractors on individual work assignments throughout all phases of the Agreement. The Energy Commission staff will review all products and deliverables to ensure quality, and consistency.

## **Work Performance**

The Energy Commission cannot accurately predict far into the future when work will be required under this Agreement. The need to conduct support will depend on a number of factors, including what research is currently being conducted at the Energy Commission and elsewhere. Further, once the need for work is initiated, the work may need to proceed at a quick pace to meet the required analytical and procedural deadlines to support standards. Accordingly, the Contractor will need to be able to respond to the Energy Commission's requests for technical support on a timely basis. The Contractor shall respond to requests for work in accordance with the following pattern:

- The Energy Commission's Contract Manager shall provide reasonable notice that a significant work effort will be required and the Contractor will need to assemble an effective and trained team during that period.
- The Contractor shall return telephone calls and e-mails from the Energy Commission's Contract Manager and provide an initial response within two (2) days if possible provided that there are no extenuating circumstances
- The Contractor shall provide quality assurance on its draft products before delivery to the Energy Commission's Work Authorization Manager.

The Contractor will be required to complete a series of specific tasks, including: management and technical functions and provision of technical support services. The Contractor shall perform various activities in carrying out the tasks under this Agreement. These activities are the general types of work the Contractor will perform in order to accomplish the tasks listed in this agreement. These are not stand alone activities, but are the types of work required to perform tasks 1-6 below. All work requested via work authorization will fall within one or more of the six (6) tasks.

## **Specific Tasks**

The Contractor will be required to perform management and technical functions; to complete a series of specific tasks and to provide technical support services.

### **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 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
- 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 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, if necessary, the budget will be reallocated to cover the additional costs borne by the Contractor, but the overall contract amount will not increase.

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 the project needs a formal amendment or that

satisfactory progress is not being made and the project needs to be ended, these conclusions will be referred to the 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 Quarterly 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:**

- Quarterly 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/index.html>

**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/index.html>

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 reimbursable under this Agreement. Permits must be identified in writing before the Contractor can incur any costs related to the use of the permit(s) 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 Research Planning**

This goal of this task is to develop and update research plans, “white papers,” and candidate research activity portfolios on RD&D of new technologies for electric generation, transmission and distribution, and loads to include but not be limited to:

- Smart Grid,
- Renewable Energy
- Distributed Generation And Possible Locations For These Energy Systems;

**When directed by the Energy Commission Contract Manager through a work authorization, the Contractor shall:**

- Prepare appropriate plans, white papers or portfolios as needed for PIER purposes and deliver to the Commission Contract Manager
- Conduct literature searches and deliver to the Commission Contract Manager
- Track and participate in policy, industrial and technical forums to ensure PIER research is relevant and useful to California policymakers, industry stakeholders and ratepayers and deliver all notes and presentations to the Commission Contract Manager
- Administer, and conduct as requested, forums, meetings and webcasts, including policy and advisory committees, with relevant stakeholders for guidance how PIER research and development activities can provide tangible benefits to California ratepayers and deliver all notes and presentations to the Commission Contract Manager
- Administer, and conduct, as needed, forums, meetings and webcasts, with relevant participants as approved by the Commission Contract Manager for information on state of the art technology developments and capabilities and deliver all notes and presentations to the Commission Contract Manager
- Report on all activities under this task in the Quarterly Reports and include all notes and presentations for use to the Commission Contract Manager.

**Task 2 Deliverables:**

- Plans (no draft)
- White Papers (no draft)
- Presentations and Notes (no draft)

**Task 3 Provide Expert Technical Review and Guidance**

The goal of this task is to provide technical expertise for the review and guidance for selected PIER projects, and coordination and collaboration across multiple PIER projects.

**When directed by the Energy Commission Contract Manager through a work authorization, the Contractor shall:**

- Participate in selected PIER project meetings as an advisor and deliver all notes and presentations to the Commission Contract Manager
- Review and comment on selected project reports, e.g., draft final reports, quarterly reports.
- Prepare expert technical review and guidance reports as requested.
- Report on all activities under this task in the Quarterly Reports and include all notes and presentations for use to the Commission Contract Manager.

**Task 3 Deliverables:**

- Reports (no draft)
- Presentations (no draft)

#### **Task 4 Outreach and Technology Transfer**

The goal of this task is to update, keep current, track and disseminate information to stakeholders of the research products for implementation of the research products throughout California.

#### **When directed by the Energy Commission Contract Manager through a work authorization, the Contractor shall:**

- Provide appropriate material reports, fact sheets, presentations and content to communicate the rationale and results of funded projects to implement the research products throughout California.
- Transfer information of research outcomes, to appropriate stakeholders as approved by the Commission Contract Manager such as California utilities, system operators, vendors, policy makers, and researchers to implement the research products. The contractors may attend conferences, meetings, seminars and other such forums as approved by the Commission Contract Manager, to implement the research products and to discuss additional actions needed to implement the research products.
- Prepare reports, summaries and notes of conferences, seminars, outreach activities, and other meetings where project results and implementation strategies are discussed and deliver all notes and presentations to the Commission Contract Manager.
- Prepare reports, fact sheets, presentations, and other PIER program information. Deliver all notes and presentations to the Commission Contract Manager.
- Report on all activities under this task in the Quarterly Reports and include all notes and presentations for use to the Commission Contract Manager.

#### **Task 4 Deliverables:**

- Reports (no draft)
- Fact sheets (no draft)
- Presentations and Notes (no draft)

#### **Task 5 Seek Co-funding Opportunities**

The goal of this task is to identify and cultivate co-funding opportunities for PIER research.

#### **When directed by the Energy Commission Contract Manager through a work authorization, the Contractor shall:**

- Monitor other research funders such as Pacific Gas and Electric, Southern California Edison, and San Diego Gas and Electric.
- Report on promising opportunities for receiving co-funding for planned PIER projects and proposals..
- As approved by the Commission Contract Manager, lead proposal development efforts for California teams applying for co-funding for projects.
- Report on all activities under this task in the Quarterly Reports and include all notes and presentations for use to the Commission Contract Manager.

### **Task 5 Deliverables**

- Co-funding Opportunities and Proposals Report (no draft)

### **Task 6 Project Technical Review**

The goal of this task is to review program and project materials as requested.

#### **When directed by the Energy Commission Contract Manager through a work authorization, the Contractor shall:**

- Monitor, and provide review for selected project assignments.
- Review all research final products to ensure accuracy and professionalism. Energy Commission guidelines shall be used for all project final reports. Final reports will be completed by the researchers under direct contract to the Commission and Contractor shall be responsible for ensuring that the reports being reviewed meets Energy Commission requirements and shall provide any needed editing. These edited reports shall be submitted to the Energy Commission Project Manager as a deliverable.
- Create Fact Sheets for selected PIER projects as determined by the Energy Commission Contract Manager.
- Review and provide relevant project, portfolio, and general information and presentation materials to support the annual report, success stories, and program review activities, as requested.
- Provide technical review and comments on Energy Commission analysis on tangible benefits to California ratepayers.
- Report on all activities under this task in the Quarterly Reports and include all notes and presentations for use to the Commission Contract Manager.

#### **Task 6 Deliverables:**

- Edited Reports (no draft)
- Fact Sheets (no draft)
- Project and Portfolio information (no draft)
- Presentation materials (no draft)
- Benefits Analysis Comments (no draft)