EXHIBIT A

Introduction

The goal of this project will be to develop a California local government energy assurance planning methodology including a fully-functional and easy to use interactive, data-driven web application that will enable local governments to create energy assurance plans for energy emergencies and supply disruptions that integrate new energy technologies and strategies. This project will conduct outreach to local governments to solicit their input on the effective development of the methodology and use of the web application. This project will provide assistance to local governments in the use of the web application through centralized training and individual assistance. This project will be establishing and maintaining an active campaign regarding the benefits of local government participation in the program to ensure that we meet our goal of completing at least 50 California Local Energy Assurance Plans (CaLEAP).

Local governments will be able to create energy assurance plans by inputting critical data about their jurisdictions into the web application, such as information relevant to existing utilities and infrastructure, vulnerabilities, emergency services, inter and intra-agency responsibilities and coordination, and pertinent maps. The web application will be adaptable to a wide range of potential local conditions, including geographic (north to south and coastal to inland to mountain), population (rural to suburban to urban), energy source profiles, disruption risks (wildfires, earthquakes, flooding, etc.). Further, the web application will incorporate information on existing electricity generation, pipelines, and transmission lines, as well as new energy technologies, such as smart grid and distributed generation. Moreover, the web application will utilize both traditional emergency response planning elements and proactive planning approaches to minimize the risk and impact of energy disruptions. Each energy assurance plan created with the web application will identify priorities, potential risks, and recommended strategies in accordance with the energy assurance methodology developed through this project.

Local governments will use this web application to create energy assurance plans that are tailored to their individual jurisdictions or regional energy assurance plans that reflect the interdependent infrastructure of multiple cities, counties, and/or regional or metropolitan planning organizations (MPO). Each local government will have the ability to select recommendations that work best in their jurisdiction during the development of their energy assurance plan.

This project will solicit feedback on the web application from local governments and other stakeholders during the course of the project. Input received and lessons learned throughout the duration of the project will be incorporated into the methodology and web application so that the final version will be robust, versatile, and user-friendly.

This project will use a jurisdictional constituent group called the Advisory User Group (AUG), consisting of CaLEAP stakeholder, energy assurance expert and civic leaders. This AUG will also participate in our broader stakeholder interactions and requirements evaluation to ensure that the methodology and web applications are vetted with a relevant constituent group, which brings credibility to the entire process and further encourages participation. The web application and methodology will identify the best balance of original design, modification of existing technology,

or integration of commercial applications to best match the project requirements. It will be complemented by training and support materials that are geared toward an audience that promotes knowledge acquisition and ease of learning. The tools will be easily integrated for re-use upon contract's end.

Task 1: Contract Management

TASK 1.1 - KICKOFF MEETING

The Contractor shall:

- Attend a "kick-off" meeting with the Energy Commission Contract Manager (CCM), Contracts Officer, and the Accounting Office. The Contractor shall include at a minimum their Project Manager, Contract Administrator, and Accounting Officer. The administrative and technical aspects of this contract will be discussed.
- At a minimum, review reference documents identified in the CaLEAP Solicitation.

Deliverables:

- Provide the CCM written confirmation that the Contractor has reviewed the Reference Documents.

TASK 1.2 - INVOICES

The Contractor shall:

- Prepare an invoice for all reimbursable expenses incurred performing work under this contract in compliance with the Terms and Conditions of the contract. Official invoices must be submitted to the Energy Commission's Accounting Office.

TASK 1.3 - SUBCONTRACTORS

In the event Subcontractors are part of the Contractor's proposal, the Contractor shall:

- Manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Energy Commission will assign all work to the Contractor. If the Contractor decides to add new subcontractors, they shall 1) comply with the terms and conditions of the contract, and 2) notify the CCM who will follow the Energy Commission's process for adding or replacing subcontractors.

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 objectives of the project.

The Contractor shall:

- Prepare monthly progress reports which summarize all contract activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete the contract within the current budget and any anticipated cost overruns.
- Each progress report is due to the CCM within 15 calendar days after the end of the reporting period.

Deliverables:
- Monthly Progress Reports

TASK 1.5 - 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 contract. The CCM will review and approve the Final Report. The Final Report must be completed on or before the termination date of the contract.

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.

The required specifications for the Final Report will be provided by the CCM.

TASK 1.5.1- FINAL REPORT OUTLINE

The Contractor shall:
- Prepare a draft outline of the Final Report.
- Submit an electronic draft outline of the Final Report to the CCM for review and approval. The CCM will provide written comments to the Contractor on the draft outline within 15 calendar days of receipt.
- Prepare and submit a final outline to the CCM once agreement has been reached on the draft. The CCM shall provide written approval of the final outline within 7 calendar days of receipt.

Deliverables:
- Outline of the Final Report (draft and final)

TASK 1.5.2 - FINAL REPORT

The Contractor shall:
- Prepare the draft Final Report for this contract in accordance with the approved outline.
- Submit an electronic draft Final Report to the CCM for review and comment. The CCM will provide written comments within 15 calendar days of receipt.

- Prepare and submit a Final Report that addresses all of the CCM's comments on the draft Final Report. Any problematic recommended changes should be discussed with the CCM. Once final editing is completed, the CCM shall provide written approval to the Contractor within 7 calendar days.
- Submit one bound copy of the Final Report with the final invoice.

Deliverables:

- Final Report (draft and final)

Task 2: Develop Energy Assurance Methodology

The main purpose of this task is to develop a methodology which will assist and encourage local governments to develop LEAPs. The challenge in creating a single methodology is to make it simple and universal enough for easy adoption, but flexible enough to accommodate the uniqueness of each local jurisdiction. The approach will focus on the critical need to tailor the methodology for the needs of California local governments. The approach will expand on the 10-Step Framework provided in the Public Technology Institute's (PTI) Local Government Energy Assurance Guidelines, Version 2 referred in the Reference Documents Section in the CaLEAP Solicitation, and incorporate other local government energy assurance planning frameworks along with lessons learned from current local government energy assurance planning development efforts, soliciting feedback, and validating the web application capabilities.

The final methodology will drive the web application design and functionality (*Task 3*) and provide the structure for the CaLEAP development training and outreach presentation material (*Task 4*). Below is a description of the major tasks in developing the final methodology:

The Contractor shall:

- Enlist the support of key local government opinion leaders that will consist of CaLEAP stakeholder, energy assurance expert and leaders to help design and validate the methodology.
- Establish an AUG. At a minimum, the AUG shall consist of representatives from: California's Utility Emergency Association (CUEA), California's Emergency Management Association (Cal EMA), Metropolitan Planning Organizations (MPO) or other Regional Planning Organizations, one large local government, one moderate size local government, and one small rural local government.
- Provide a means to encourage the local governments to accept responsibility to develop and update their plans and to help build longer-term capacity around energy assurance planning at the local level.
- Encourage buy-in of the methodology using a collaborative approach.
- Educate local governments on the importance and benefits of energy assurance planning.

Task 2.1 Draft Methodology Development

Subtask 2.1.1 Using an All-Hazards Approach

The Contractor shall:

- Adhere to and promote an "all-hazards" approach within the CaLEAP methodology. All-hazards is a unifying approach to dealing with emergencies.

Subtask 2.1.2 Using the 10-Step Framework

The Contractor shall:

- Expand upon the work developed by Project Team member PTI "10-Step Energy Assurance Framework" (Framework). It was written with valuable input from local government leaders and national energy assurance experts. As the acknowledged foremost set of rules and principles available for building local government energy assurance plan (LEAP), the Framework will be used as the foundation for the development of the CaLEAP methodology.
- Work with the Energy Commission to improve upon the Framework to make the LEAP process more efficient for California local governments, *e.g.*, address financing of LEAPs.

2.1.3 Utilizing Input from California State EAP and Energy Commission Guides

The Contractor shall:

- Coordinate with the California's Energy Assurance Planning efforts and all other relevant state emergency planning efforts.
- Evaluate and integrate processes and methods from the Energy Commission's *Energy Aware Planning Guide* that provides smart energy practices and smart land use planning.

2.1.4 Existing Emergency Operation Procedures Structures

The Contractor shall:

- Provide the appropriate placeholders in the CaLEAP methodology to incorporate relevant portions of other emergency plans. Many local governments already have emergency operation and continuity of operations plans (COOP). It is important that energy assurance planners review existing emergency plans in their local governments, regions, and/or state.
- Incorporate the typical stages of the emergency planning process: prevention, preparedness (protection), response, and recovery, protecting critical infrastructure, and enhancing resiliency.
- Ensure that the local governments can tie it back to existing emergency plans.

2.1.5 Federal Guidelines and Risk/Response Frameworks

The Contractor shall:

- Utilize a variety of sources for guidance to develop the draft CaLEAP methodology and to incorporate a risk management framework into the methodology. These include guidelines from federal sources such as the Federal Emergency Management Agency (FEMA), Department of Homeland Security (DHS), Department of Energy (DOE), Emergency Support Function (ESF), National Infrastructure Protection Plan (NIPP), National Association of State Energy Officials (NASEO), and National Response Framework (NSF) documents; coordinating with California's State Energy Assurance Planning, and utilizing local energy profiles, and existing emergency operation procedures (EOPs)..

2.1.6 Energy Profiles

The Contractor shall:

- Incorporate the diversity and uniqueness of all the state's various local energy profile characteristics and region-specific hazards that could cause energy disruptions in any CaLEAP.
- Incorporate regional characteristics after analyzing the energy profile characteristics on a more granular level (regional as opposed to state).

2.1.7 The Impact of New Energy Technologies on Energy Assurance

The Contractor shall:

- Optimize resiliency by emphasizing the importance of including new energy technologies in the CaLEAP methodology. These emerging technologies will be a vital part of the puzzle to help local governments in energy resiliency. These technologies include:
  - Distributed generation
  - Smart Grid
  - Energy efficiency
  - Renewable energy

2.1.8 Dealing with Confidential Data

The Contractor shall:

- Incorporate specific processes to handle and store confidential information since it may also be better to keep secure information stored outside of the CaLEAP in more than one location for use by authorized individuals only.
- Control the access to data, processes plans, and confidential information.
- Incorporate identification of confidential data, and provide processes to secure access of such data.
- Design CaLEAPs to be easily accessible in case of an emergency.
- Solicit stakeholder feedback while developing the CaLEAP methodology to ensure that the local governments' concerns regarding handling of sensitive data are completely and satisfactorily addressed.

- Develop processes that include checklists of critical assets like the ones from the *Local Government Energy Assurance Guidelines*, *Version 2.0.* These checklists are only illustrative and are not meant to be "one size fits all." The CaLEAP methodology will contain processes to develop customized checklists for each local government based on the asset profiles in each region to address confidentiality issues.

2.1.9 Addressing Interdependencies in EAP

The Contractor shall:

- Identify critical infrastructure interdependencies
- Collect data and build an energy profile for the region, county, or municipality for each CaLEAP.

Task 2.2 Vetting the LEAP Methodology against the Web Application

The Contractor shall:

- Ensure that while the CaLEAP methodology is being developed, the framework of the methodology is vetted against the design and capabilities of the web application.
    - Vet the first draft CaLEAP methodology with the web application (Task 3) team.
    - Vet the second draft CaLEAP methodology to stakeholders for their feedback.
    - Incorporated the final CaLEAP methodology into the final design of the web application

Task 2.3 Advisory User Group Feedback

The Contractor shall:

- Tailor the CaLEAP methodology to the unique needs of California local governments through the following steps.
- Enlist key local government leaders to help design and test the CaLEAP methodology.
- Leverage the early-adopting community leaders
- Create the Advisory User Group (AUG). At a minimum, the AUG shall consist of representatives from: California's Utility Emergency Association (CUEA), California's Emergency Management Association (Cal EMA), Metropolitan Planning Organizations (MPO) or other Regional Planning Organizations, one large local government, one moderate size local government, and one small rural local government.
- Select a regionally diverse group from the early adopter stakeholder group.
- Obtain input from stakeholders to increase the chances of faster buy-in from local governments to enable easier dissemination and adoption across California.
- Solicit feedback through in-person workshops and webinars during the development of the draft methodology. Multiple workshops/webinars will be held in various regions in California (Task 4).
- Assess that significant feedback was obtained from the AUG that captures all the varying regional characteristics as required in Task 2.1.6.
- Continue soliciting feedback from stakeholders until previous subtask is satisfied.

2.3.1 Energy Commission Involvement

- Provide monthly reports on progress.
- Engage the Energy Commission at key points in the process.
- Identify the key points in the process
- Solicit CCM approval in the proposed AUG.
- Solicit comments from the CCM on the direction of the methodology developed by both the AUG and the Project Team of experts.
- Solicit the CCM's input on how the methodology interfaces with the web application.
- Solicit the CCM's input on the outline, draft, and final CaLEAP methodology Report.
- Prepare and submit an electronic version of the draft Outline CaLEAP Methodology Report to the CCM for review and approval. The CCM will provide written comments to the Contractor on the draft outline within 5 calendar days of receipt.
- Prepare and submit a draft CaLEAP Methodology Report to the CCM once agreement has been reached on the Outline. The CCM will provide written comments to the Contractor on the draft outline within 15 calendar days of receipt.
- Prepare and submit a final CaLEAP Methodology Report to the CCM once agreement has been reached on the draft. The CCM shall provide written approval of the final within 15 calendar days of receipt

Deliverables:

- Outline LEAP Methodology Report
- Draft LEAP Methodology Report (Task 2.1)
- Final LEAP Methodology Report (Task 2.2)

Task 3. Web Application Using Energy Assurance Methodology

The goal of this task is to develop and deploy a local energy assurance plan web application (LEAPWA) that incorporates the CaLEAP methodology. The LEAPWA will provide the necessary resources to achieve energy resiliency for local governments in California. The LEAPWA will also support outreach and recruitment efforts.

Critical Success Factors

The goal of this task is encouraging the development of LEAPs. The LEAPWA will be engineered to be engaging from start to finish. The tool will be wizard driven and will allow users to import existing data sets and proceed down a development pathway to a successful conclusion with easy updating capabilities. The LEAPWA will design and incorporate the following functions.

The Contractor shall:

- Design a *logical and clear interface* that engages the user at the outset and builds the plans through manageable, small steps with developmental stages to reflect CaLEAP Methodology

- Use an open or industry *standards* to facilitate importing of existing datasets and ensure data compiled within this system is accessible for use in other, related activities

- Solicit strong *stakeholder involvement* in design to ensure the system and the overall program reflects the priorities, terminology and values of the community

- Incorporate reliable access to *self-help* (reference documents, examples, best practices) and direct customer support, both system and subject matter, to readily overcome barriers to plan completion

- Build from industry standards and ECE-ITSB *approved technologies* and hosted on reliable, robust infrastructure to ensure consistent and predictable functionality

- Provide data *security* that meets or exceeds industry standards and provide user level access controls to ensure appropriate contributions and visibility on completed plans and those under development

Key Components of the LEAPWA

The LEAPWA will be built in a secure and robust web environment. It will provide a simple interface that is intuitive, welcoming, and focused and have help resources to engage users and retain their attention throughout the process.
The core of the system will be a workflow management tool which is built upon the resulting CaLEAP methodology developed pursuant to Task 2. The LEAPWA user interface will prompt the user to provide the minimum essential information to populate the plan and will employ data validation tools to help ensure the data quality.

The Contractor shall:

- Build an Energy Assurance Response and Planning Team *(EARPT).*
- Know the Emergency Authority Framework.
- Understand Response Roles and Responsibilities.
- Know the Local Government Energy Profile.
- Identify Energy Suppliers.
- Know the Primary Contacts and Related Partners.
- Identify Key Assets within the Jurisdiction*.*
- Develop a Crisis Communication Protocol*.*
- Develop State/Regional/Federal Partnerships for Energy Assurance.
    - Update Your Plan on a Consistent Basis*.*

Task 3.1 Validate Alternative Analysis

The Contractor shall:

- Identify the key technical elements required for a successful LEAPWA, which will include soliciting input from the Energy Commission and the AUG.
- Conform to the System requirements specified by the California Energy Commission's Information Technology Service Branch (ITSB) at the time of scheduled development. This includes, but is not limited to, software requirements, server hardware specifications (both SQL Database and Web Portal), and host requirements.

- Conform to the requirements of the Energy Commission's ITSB and Web Development Team in the development of the Web Application.
- Conform to all applicable web publishing, intellectual property licensing, and acquisition requirements in the development of the Web Application.
- Train Energy Commission staff on how to use, maintain, and update the Web Application
- Identify the most cost-effective approach for the Web Application. This will include an alternative analysis which will list the critical and preferred high-level attributes of the system (e.g., features, functions, technology, timeline, level of configuration, complexity of administration) and will be compared against several development approaches. Review and validate with the Energy Commission, the AUG, and possibly other subsequent stakeholders, the attributes and options of the tool through a series of facilitated meetings.

- Deploy the LEAPWA for the Energy Commission's Information Technology Services Branch (ITSB) staff with an ITSB approved technical environment that will require little additional training to take over account and system management, and thus, enable the Energy Commission to use, maintain and update the system over time.

Task 3.2 Determine Architecture and Development Environment

The goal of this task is to bring optimal value and utility to the users in the short term. With the general guidance determined by the actions in Task 3.1 and Task 2, the Project Team, the Energy Commission, and the AUG will finalize the high-level technical framework for the development of the tool.

The Contractor Shall:

- Select the hosting environment, database engine, and the development environment. This will be approved by the Energy Commission and the ITSB.
- Test the solution on standard browsers and varying bandwidth connections that are mutually established.
- Host the LEAPWA at the Contractor's Tier IV Data Center managed by Venyu[1].

Task 3.3 Preliminary Requirements Building

The Contractor Shall:

- Design the system requirements through a structured user-centered engagement with AUG as mentioned in Task 3.1.

[1] Venyu is a Tier IV data center and is the most secure and reliable data center environment available under the data center typology of The Uptime Institute.

- Optimize the designed system to enable action, rather than expect to arrive at a final, ideal outcome.
- Include in the system requirements a list of databases and conceptual data models.
- Include preliminary requirements that will include the definitions of the databases and interrelationships, workflow and system outputs.
- Define and document use-cases that have single and multi-user plan development, maintenance, data import, data export and account management for use in execution of the LEAPWA test plan."

Task 3.4 Development, Deployment, and Testing of Prototype

The goal of this task is the web-application prototype development, deployment and testing.

The Contractor shall:

- Develop and deploy for testing and evaluation the LEAPWA prototype by the relevant pilot stakeholders. Rigorous testing will center on the key functionality and less on the user experience which will require considerable refinement in later stages.
- Confirm stakeholder approval of the core functionality prior to acceptance of the prototype by the Energy Commission.
- Prepare the Draft Publication-Ready Web Application.
- Prepare and submit the Draft Publication-Ready Web Application to the CCM. The CCM will provide written comments to the Contractor on the Draft Publication-Ready Web Application within 15 calendar days of receipt.

Deliverable:

- Draft Publication-Ready Web Application (LEAPWA) Using LEAP Methodology (Task 3.1)

Task 3.5 Detailed Requirements Building

The Contractor shall:

- Refine the development on data models and reports.
- Improve the user experience.
- Develop the final system requirements.
- Integrate input provided from the AUG into the detailed requirements and rigorously test the final version.

Task 3.6 Development, Deployment and Testing of Final System

The Contractor shall:

- Complete the refinement of the system and stage it on an anonymous or unlinked URL.
- Employ use-cases from Task 3.3 to test to the workflow functionality and overall user experience.
- Make the final system available to users for acceptance testing.

- Conduct acceptance testing in accordance with an agreed upon test plan and use cases from Task 3.3 to ensure acceptance of the LEAPWA system
- Prepare and submit the draft Final Publication-Ready Web Application to the CCM. The CCM will provide written comments to the Contractor on the draft Final Publication-Ready Web Application within 10 calendar days of receipt.
- Prepare and submit the Final Publication-Ready Web Application once agreement has been reached on the draft Final Publication-Ready Web Application. The CCM shall provide written approval of the final within 10 calendar days of receipt.

Deliverable:

- Final Publication-Ready Web Application (LEAPWA) Using LEAP Methodology (Task 3.2)

Task 3.7 Develop a System Administration Manual and, Training and Maintenance Documents

The Contractor shall:

- Develop a System Administration Manual (Manual) for the LEAPWA that describes the LEAPWA's key components, technical specifications, and functionality.
- Develop online help files in the Manual that make information readily accessible to users at all times.
- Develop the Manual, in combination with typical use-cases and pre-configured plan templates, into training references that walk users through the normal anticipated workflows.
- Maintain the LEAPWA throughout the period of performance of the Agreement.
- Develop training documents and coordinate with the efforts described in Task 4 to support user self-help and instructor led training, as well as system administration training of designated Energy Commission information technology (IT) staff. The system administration training will include user security administration, content and reference data updates, and log monitoring and will also include a troubleshooting guide. The troubleshooting guide will be a reference for the Energy Commission's system administrator that will result from the Contractor's administration and maintenance of the LEAPWA during the performance period of the Agreement.
- Prepare and submit the Draft System Administration Manual to the CCM. The CCM will provide written comments to the Contractor on the draft Final Publication-Ready Web Application within 10 calendar days of receipt.
- Prepare and submit the Final System Administration Manual once agreement has been reached on the draft Final Publication-Ready Web Application. The CCM shall provide written approval of the final within 10 calendar days of receipt.
- Prepare and submit all the Draft User Training Documents to the CCM. The CCM will provide written comments to the Contractor on the draft Final Publication-Ready Web Application within 10 calendar days of receipt.

- Prepare and submit all the Final User Training Documents once agreement has been reached on the draft Final Publication-Ready Web Application. The CCM shall provide written approval of the final within 10 calendar days of receipt.

Deliverable:

- System Administration Manual and User Training Documents

Task 4. Stakeholder Outreach

The goal of this task is the development of the stakeholder outreach material for all tasks. This task includes efforts to prepare the program presentation material and the local government feedback report. The stakeholder outreach materials prepared in this task will be in direct support of our Task 5, Outreach and Implementation Plan (OaIP).

Task 4.1 Stakeholder Outreach Meeting Schedules

The Contractor shall:

- Recruit, engage, and support the stakeholders throughout the life of the project. In some cases the stakeholders will be the AUG for Tasks 2 and 3, and in other case they will include local governments as in Task 5.
- Identify clearly the stakeholder group for each task and activity throughout the project There are several key occasions during each phase of the program when stakeholders will be engaged as outlined in the *Outreach and Implementation Plan* in Task 5.
- Conduct regional workshops.
- Apply the industry's best practices for conducting each of the regional workshops.

Workshop Coordination and Logistics

The Contractor shall:

- Coordinate all aspects of the every workshop, including logistics surrounding their execution.
- Develop the workshop meeting schedule (*i.e.* ,dates and times) in coordination with the CCM
- Identify possible meeting rooms/venues and reserve meeting space
- Handle the set-up and layout of meeting locations
- Disseminate the meeting notification to stakeholders (e-mail and direct mail, as well as verbal communication as necessary)
- Oversee other publicity efforts (web postings, distribution to social media outlets, coordination with third party organizations such as the League of California Cities)
- Coordinate staffing
- Prepare informational materials
- Prepare fact sheets
- Prepare display boards
- Prepare attendance sign-in sheets

- Facilitate the workshops
- Provide note-taking
  Provide the logistical support for the webcast meeting. Live Meeting" or a similar software program will be used to convene the workshops and will feature opportunities for online participants to chat with presenters and methods for participants to submit questions via the Internet and phone.
- Record and save each webinar for subsequent viewing through the project website, along with the presentation material. Prepare and submit all draft material to the CCM. The CCM will provide written comments within 5 calendar days of receipt.

Deliverables:

- Stakeholder Outreach Meeting Schedules
- Stakeholder Attendance Rosters

Task 4.2 Program Presentation Material

Stakeholder Outreach Material

The goal of this task is to generate cost-effective materials and customer service to local governments during all aspects of the project.

The Contractor shall:

- Identification of the stakeholder list and potential priority stakeholders
- Identify local governments, early on in the process, that are interested in the program and may want to be key members of the AUG.
- Begin conducting outreach activities, in accordance with the OaIP, to inform stakeholders about upcoming workshops and other opportunities for involvement in this program.
- Develop relevant program information materials to help target stakeholders in advance of all workshops.
  The materials to be developed and employed to notify stakeholders about the project will include:
  - Direct notification via letter, email, or postcard
  - Notification on project website
  - FAQ sheets
  - Social media outlet, such as a project blog or Facebook© page
- Work closely with the Energy Commission to develop the presentation format and content for the outreach materials.
- Organize workshops to allow for facilitated discussions to successfully generate meaningful input and interactive discussions.

- Prepare and submit all draft material and presentations to the CCM. The CCM will provide written comments within 5 calendar days of receipt.

Deliverables:

- Presentation materials for stakeholder outreach meetings

Task 4.3 Local Government Energy Assurance Feedback Report

The Contractor shall:

- Prepare a detailed report on the feedback received from local government involvement and how that feedback was addressed.
- Prepare and submit an electronic version of the draft Outline of the Local Government Energy Assurance Feedback Report to the CCM for review and approval. The CCM will provide written comments to the Contractor on the draft outline within 5 calendar days of receipt.
- Prepare and submit a Draft Local Government Energy Assurance Feedback Report to the CCM once agreement has been reached on the Outline. The CCM will provide written comments to the Contractor on the draft outline within 15 calendar days of receipt.
- Prepare and submit a Final Local Government Energy Assurance Feedback Report to the CCM once agreement has been reached on the draft. The CCM shall provide written approval of the final within 15 calendar days of receipt

Deliverable:

- Local Government Energy Assurance Feedback Report (Outline, Draft and Final)

Task 5. Identify, Recruit, and Enroll Candidates for Energy Assurance Plan Development Assistance

The primary goal of this task is to develop an Outreach and Implementation Plan (OaIP), that addresses stakeholder recruitment, engagement, and assistance. The Project Team will work closely with the CCM to deliver a comprehensive and realistic OaIP.

Task 5.1 Outreach and Implementation Plan

The Contractor shall:

- Engage community leaders directly and/or through their respective professional associations to educate them about energy assurance and the project or equip them with new information and materials to reach their peers.
- Coordinate with the Energy Commission to ensure that the OaIP is comprehensive
- Present best practices to encourage participation by local governments.
- Include the following sections, at a minimum, in the OaIP:
  - Approach
  - Purpose

- Goals/objectives
- Key messages and communication channels
- Stakeholders/customers/primary and secondary audiences (identified in Task 4)
- Recruiting local governments (Task 5.2)
- Building the candidate list (Task 5.3)
- Assisting local governments in the development of plans (Task 5.4)
- Strategy/tactics: tasks and deliverables
- Timeline
- Key issues/success factors
- Metrics

Stakeholder Identification

The Contractor shall:

- Solicit the engagement of a large cross-section of stakeholders (650+ cities and 58 counties).
- Target several different professionals at the counties and cities—professionals who have vested interest in the development of energy assurance plans, e.g., elected officials.
- Leverage relationships to recruit participation from cities and counties in California.
- Target the local city or county emergency managers and energy efficiency directors.
- Leverage some of the current emergency planning efforts and integrate the LEAP into those processes.
- Work with groups and/or affiliations that many of the counties and cities are a part of that focus on:
    - Emergency management (i.e., California Emergency Management Association)
    - Regional coordination (i.e., Urban Area Security Initiative and Council of Government)
    - Lifelines/utilities (i.e., California Utilities Emergency Association).
- Leverage these groups to solicit participation in the program.
- Leverage long-standing relationships with many utilities in California.
- Work with PG&E, SCE, SDG&E/Sempra, and SMUD.
- Reach out to the local county and city governments through these utilities.

Priority Stakeholders

The Contractor shall:

- Solicit participation from all 650+ cities and 58 counties in California
- Use a strategic, targeted approach to ensure participation.

- Target certain stakeholders to increase the likelihood of building a large group of "early adopters."
    - Use this targeted group to vet material and become spokespersons for the CaLEAP program as a whole.
- Work with the CCM on key criteria for the target candidate selection, weighting or ranking specific criterion where appropriate. Some of the criteria for targeted group selection to be considered are listed below:
    - Population
    - Population density
    - Multiple hazard risks
    - Resource needs
    - Willingness to participate
    - Likelihood of success
    - Regional participation
    - Geographic location
    - Proximity to major energy infrastructure
    - Involvement in any past energy emergency
    - Involvement in a current or past utility-funded community energy program
    - Involvement in updating local EOPs
    - Active engagement in a FEMA Hazard Mitigation Plan (HMP) update
    - Involvement in a General Plan update
    - Involvement in, or considering, a multijurisdictional regional energy planning initiative
    - Involvement in any major energy initiative run by any California local government association, including the Local Government Commission, League of California Cities, Southern California Association of Governments, and Association of Bay Area Governments
    - Involvement in any major energy programs managed through national local government associations, including PTI, the U.S. Conference of Mayors, the National League of Cities, the National Association of Counties, the International City and County Management Association and Local Governments for Sustainability
    - Involvement in any third-party energy programs run by relevant associations such as the California Building Industry Association and the California Sustainability Alliance
    - Those local governments receiving direct non-EECBG energy program funds through DOE's State Energy Program
    - Involvement in major DHS initiatives
    - Past and/or current involvement in any stage of EAP
    - Governments with an existing EAP

- Cities with large hard-to-reach communities
- Governments that applied to, but did not, become a formal Local Energy Assurance Program city or county
- Local government members of energy-driven non-governmental organizations (NGOs) such as the San Joaquin Clean Energy Office and the San Diego Regional Energy Office
- Involvement in any foundation-funded energy initiatives (such as the San Francisco-based Energy Foundation)
- Other factors as suggested by the Energy Commission

Possible Stakeholder Incentives
Many jurisdictions will be challenged to fund a LEAP effort or the outcome of LEAP planning.

The Contractor shall:
- Demonstrate valuable incentives to participation with program outreach materials.
- Present possible financial incentives, to the extent available, for participation to local governments.
- Prepare and submit an electronic version of the draft Outline of the CaLEAP Program Outreach and Implementation Plan to the CCM for review and approval. The CCM will provide written comments to the Contractor on the draft outline within 5 calendar days of receipt.
- Prepare and submit a Draft CaLEAP Program Outreach and Implementation Plan to the CCM once agreement has been reached on the Outline. The CCM will provide written comments to the Contractor on the draft outline within 15 calendar days of receipt.
- Prepare and submit a Final CaLEAP Program Outreach and Implementation Plan to the CCM once agreement has been reached on the draft. The CCM shall provide written approval of the final within 15 calendar days of receipt

Deliverable(s):
- CaLEAP Program Outreach and Implementation Plan

Task 5.2 Stakeholder Implementation
The goal of this task is a continued campaign for recruiting, engaging, and supporting the stakeholders throughout the life of the program. There are several key occasions during each phase of the program when stakeholders will be engaged. The first series of workshops (the four regional workshops) will take place during the stakeholder initial recruitment phase, the second series of workshops during the program development and recruitment phase and the last round of workshops during the LEAP development phase.
The regional workshops will be vital for identifying “early adopters” and possible AUG members. Ensuring that there is a good cross section of stakeholders will be essential to ensure the LEAP methodology is comprehensive and will be applicable to all.

The Contractor shall:

- Conduct four in-person workshops geographically spread out throughout the state at the start of the project. Initial thoughts are to conduct in-person workshops in the strategic locations that will allow for maximum stakeholder participation, while also covering large general areas of the state (i.e., Los Angeles, Fresno, Oakland, and Sacramento).
- Include subject matter experts to conduct the workshops and provide:
    - Informational material on the initial LEAP methodology,
    - Concepts around the web application tool,
    - Development of LEAPs,
    - Some basic energy assurance/energy resource elements (i.e. the benefits of renewables, distributed generation, Smart Grid and its applicability to LEAPs.

- Provide the stakeholders with an opportunity (in the second series of workshops) to have input into the program methodology and web application tool design.
- Conduct a series of webinars on the following topically relevant subject such as:
    - LEAP Fundamentals, including Energy 101, Understanding Interdependencies ,and Building a LEAP Team
    - Understanding and Taking an All-Hazards Approach
    - Understanding Continuity of Operations Plans (COOPs) and Emergency Response Planning at the Local Level
    - The Use of New Technologies in LEAPs
    - A Smart Grid Primer for Local Governments
    - Key Partnership Development and Relationship Building (local, state, regional, and federal)
    - Local Government Energy Assurance Challenges
    - How to Utilize Social Media in Your Planning and Communication Efforts
    - Cyber Security—What Are Your Threats?
    - LEAP Communication Plan Guidance
    - Energy Infrastructure Issues for Local Governments
    - Financing Options for Energy Assurance
    - The Role of Energy Efficiency and Renewable Energy in Your LEAP
    - Mutual Aid Agreements and Regional Cooperation

- Conduct the last series of workshops to ensure stakeholders are proceeding/making progress and are receiving any necessary technical support to complete their LEAPs.
- Provide a mix of one-on-one meetings, group meetings, and webinars.
- Actively and regularly target stakeholders through communication and outreach activities. This will be done to keep stakeholders informed and engaged in the program between the regional workshops and up to the completion of their LEAPs. As noted in Task 4, tactics used to continue to engage these stakeholders include:
    - Email/postcard notifications with schedule updates

- Updates to social media outlets, like a project blog or Facebook© page, and project website
- One-on-one briefings, smaller group meetings and presentations, and verbal communication

- Continue regular stakeholder communication and stakeholder recruitment. *The goal is to enroll at least 50 local governments to create CaLEAPs.* If the regional workshops do not encourage more than 50 participants, the Project Team will conduct additional widespread workshops to encourage more participation (in conjunction with more focused efforts to enlist participants). However, if the regional workshops encourage 50 or more participants, the additional stakeholder recruitment workshops will be limited and focused.
- Solicit strategic stakeholders (AUG) from the base of stakeholders. The AUG will be comprised of key community leaders from three to five California cities.
- Invite and encourage representatives from the three California cities (Chula Vista, San Jose, and Visalia) whom are currently working to develop LEAPs to participate on the AUG. Incorporating their lessons learned and best practices will be valuable to developing a comprehensive LEAP methodology and web application tool.
- Prepare the marketing materials in Task 4 for recruiting cities and counties.
- Post all handout material on the project website.
- Capture attendance at all meetings for the final report.
- Prepare and submit all draft material and presentations to the CCM. The CCM will provide written comments within 5 calendar days of receipt.

Deliverable(s):

- Recruitment meeting schedules
- Presentation materials for recruitment meetings
- Recruitment meeting attendance rosters
- Candidate list

Task 5.3 Assist Local Governments

The Contractor shall:

- Provide LEAP technical assistance to local governments by the following proven techniques and services:
  - Constant verbal and e-mail communication between our team and local governments
  - 24/7 remote access to web application and general energy assurance expertise
  - Unparalleled access to new California-specific energy assurance information
  - Unequalled access to national energy assurance LEAPs
  - On-site visits from staff where needed/requested

- A new energy assurance blog and web site for California local governments
- Regularly scheduled webcasts and webinars for our candidates
- Peer-to-peer exchanges
- State-of-the-art marketing materials, including new brochures, new energy assurance background documents, step-by-step guidance documents, and film/social media energy assurance education access
- Provide each jurisdiction a minimum of 30 hours of direct technical assistance. The quantity of technical assistance will vary based on the needs of each jurisdiction.

Deliverable:

- Status reports on the development of energy assurance plans