

Exhibit A Scope of Work

PURPOSE

The purpose of this contract is to develop technical assistance materials for each category of regulated appliance, and to increase manufacturer, distributor, and retailer compliance with, and awareness of the appliance efficiency program's requirements.

ELECTRONIC FORMAT REQUIREMENTS

The Contractor shall submit all deliverables in an electronic format that will enable Energy Commission staff to update information when program requirements change. The deliverables shall also be prepared in PDF format ready for inclusion on the Energy Commission's website. The software types listed below are approved for deliverables under this contract:

Type	Name	Version
Desktop Operating System	Windows XP	SP 2
Word Processing	Microsoft Word (Office Suite 2007)	
Spreadsheet	Microsoft Excel (Office Suite 2007)	
Presentation	Microsoft PowerPoint (Office Suite 2007)	
Utility	WinZip	11.1
Publishing	Adobe Acrobat	8.0
Internet Browser	Internet Explorer	7
Database	Microsoft Access 2007	

TASK 1: CONTRACT MANAGEMENT

Task 1.1 - Kickoff Meeting

The Contractor shall:

- Attend a “kick-off” meeting with the Energy Commission Contract Manager, Contracts Officer, and the Accounting Office. The Contractor may include their Project Manager, Contract Administrator, Accounting Officer, and any other members that the Contractor deems necessary. The administrative and technical aspects of this contract will be discussed. Prior to the kick-off meeting, the CCM will provide an agenda to all potential meeting participants. The date, time, and location will be set by the CCM. The Contractor may attend this meeting in person, via telephone conference call, via WebEx, or other electronic means.

Commission Contract Manager Deliverables:

- Kickoff Meeting Agenda

Task 1.2 - 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:
 - Progress to date in each task
 - The degree of completion for each task
 - Current and cumulative budget expenditure by task
 - Cumulative contract expenditures
 - Variance from planned expenditure schedule
 - Status of deliverables
 - DVBE contract expenditures
 - Problems, and other information requested by the Energy Commission’s Contract Manager
- Format of the Monthly Progress Reports will be provided by the CCM.
- Each progress report is due to the CCM within 5 calendar days after the end of the reporting period and each progress report shall coincide with the invoice period.

Task 1.2 Deliverables:

- Monthly Progress Reports

Task 1.3 - 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 Contractor shall:

- Prepare the draft Final Report for this contract in accordance with the formatting requirements in the "STYLE MANUAL", Second Edition – For Preparing Contract and Consultant Reports for the California Energy Commission (Energy Commission publication # CEC-180-2010-002).
- The report shall summarize the process and end products generated through this contract and include recommendations for future actions to increase program compliance, including any industry recommendations for a comprehensive public/private partnership for maximizing appliance efficiency savings.
- 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 ten hard copies of the Final Report as well as two electronic versions in the approved electronic format, as described in the Electronic Format Requirements section above, on DVD with the final invoice.

Task 1.3 Deliverables:

- Final Report (draft and final)

TASK 2: PRELIMINARY DRAFT TECHNICAL ASSISTANCE AND OUTREACH MATERIALS

The goal of this task is to discuss requirements for appliance categories, evaluate messaging and media, and develop preliminary outreach materials.

The Contractor shall:

- Meet with the CCM, Web Team representative, and Appliance Efficiency Program staff as necessary to review and ask questions about the list of appliance categories, and discuss the differing compliance requirements for the different appliance categories. Meetings can be conducted in person at Energy Commission headquarters in Sacramento; by WebEx; or by conference call as deemed appropriate by the CCM.

- Evaluate the appropriate messaging and media for promoting program compliance with the industry segments (manufacturers, distributors, wholesaler, and retailers) that cause these regulated appliances to be sold or offered for sale in California.

Task 2.1 - Technical Assistance Materials For Manufacturers

The goal of this subtask is to develop a master document (template) for each appliance category to raise awareness of the Appliance Efficiency Regulations requiring product certification, the benefits of compliance; and technical assistance for compliance with the certification process.

The Contractor shall:

- Identify the audience for each appliance category listed above under “Appliance Categories”, including language(s) for translation needs, by consulting with industry representatives, Energy Commission staff, CCM.
- Develop a generic “compliance awareness and benefits” message to be used on all versions of the compliance fact sheets for approval by CCM.
- Identify compliance issues specific to each audience and recommend how these issues are best addressed in the fact sheet.
- Obtain input from key industry associations under the direction of the CCM. Feedback from industry representatives will ensure that draft outreach materials properly address and clarify any issues about the certification process and compliance with the law.
- Capture any recommendations from industry representatives regarding future actions beyond the scope of this contract to increase overall compliance with the program.
- Further revise the draft outreach materials based on feedback and prepare a final draft of each item for submission to the CCM for approval.

Task 2.1 Deliverables:

- Draft Technical Assistance Outreach Materials for Manufacturers

Task 2.2 - Web Based Materials

The goal of this subtask is to develop web based materials for incorporation into the Appliance Efficiency Program’s web page.

The Contractor shall:

- Review the Appliance Efficiency Program’s web page on the Energy Commission web site in consultation with the CCM and the Energy Commission’s Web Team.
- Make recommendations for effectively utilizing the appliance program’s web page as an outreach tool.

- Develop web based materials, consistent with State and Energy Commission web guidelines for style and format, for incorporation into the Appliance Efficiency Program's web page based on the above analysis and at the direction of the CCM.
- Identify the audience for each appliance category listed above under "Appliance

Task 2.2 Deliverables:

- Draft Web Based Materials

Task 2.3 – Retailer/ Distributor Outreach Materials

The goal of this subtask is to develop the appropriate messaging and materials for outreach to retailers and distributors.

The Contractor shall:

- Develop the appropriate messaging and materials for outreach to retailers and distributors. The materials shall educate the appliance sales community on how to ensure that the appliances they sell or offer for sale comply with California and federal efficiency regulations.

Task 2.3 Deliverables:

- Draft Outreach Materials for Retailers/ Distributors

Task 2.4 – Consumer Awareness Outreach Materials

The goal of this subtask is to develop the appropriate messaging and materials to perform outreach to consumers.

The Contractor shall:

- Solicit feedback from stakeholders about potential materials and messaging targeting consumers to verify that new outreach materials will help consumers. Stakeholder contacts and contact methods will be determined by the Contractor in consultation with Program Staff, and must be approved by the CCM.
- Develop the appropriate messaging and materials to perform outreach to consumers in consultation with the CCM and stakeholders. Consumer outreach materials shall educate consumers on California's appliance efficiency program, including the benefits of purchasing compliant products.
- Make recommendations, if directed by the CCM, in regard to innovative technical solutions that may be available to consumers such as applications that can search the Appliance Database or SKUs to confirm they meet California's energy standards.

Task 2.4 Deliverables:

- Draft Outreach Materials for Consumers

TASK 3: REVISED MATERIALS & DISTRIBUTION RECOMMENDATIONS

The goal of this task is to revise the materials prepared under Task 2 above based on feedback from Appliance Efficiency Program staff and key industry associations. The second goal of the task is to determine how best to distribute outreach materials.

The Contractor shall:

- Schedule meetings to take comments from Appliance Efficiency Program staff on the draft print and electronic materials prepared under Task 2.
- Prepare revised draft print and electronic materials, based on feedback from the CCM and Appliance Efficiency Program staff, in preparation for meetings with key industry representatives.
- Schedule meetings with key industry associations to take comment on the draft outreach materials. A minimum four (4) meetings will be held. The meetings may be held via a WebEx or in person at the Energy Commission or another location convenient to the industry representatives. If meetings are not held at the Energy Commission, they will be held at another governmental or utility location to reduce costs.
- Provide assistance with meeting preparation which may include preparing presentation materials, PowerPoint presentations, tracking attendees, and RSVPs, and coordinating with the CCM about meeting facilitation, management, and follow-up of these meetings. These meetings will solicit feedback from industry representatives to ensure that draft outreach materials properly address and clarify any issues about the certification process and compliance with the law.
- Document any recommendations from industry representatives regarding future actions beyond the scope of this contract to increase overall compliance with the program.
- Further revise the draft outreach materials based on the feedback.
- Solicit feedback regarding materials and messaging from Energy Commission staff, and consumer representatives to verify that these materials will help consumers buy compliant products
- Solicit feedback from Energy Commission staff, industry and other stakeholders on how to best distribute these materials to the regulated industry and consumers.
- Solicit suggestions on other approaches for increasing compliance with the law and make recommendations to staff regarding the most cost-effective means of distributing fact sheets to maximize compliance with the Appliance Efficiency Regulations; for example, targeted mailings, websites, and partnerships with stakeholders. The Energy Commission will be responsible for the production, printing, and dissemination of materials.
- Prepare recommendations for how to best distribute the materials.

Task 3 Deliverables:

- Revised Outreach Materials
- Meeting Presentation Materials
- Distribution Recommendations

TASK 4: TRANSLATED MATERIALS

The goal of this task is to translate deliverables into a variety of languages. Contractor must provide accurate translated materials by utilizing in-house or sub-contracted translation services approved by the CCM.

The Contractor shall:

- Translate technical assistance fact sheets for manufacturers as directed by the CCM from English into other languages that may include but are not limited to, Japanese, Korean, Mandarin, Spanish, and German.
- Translate Retailer and/or Consumer Outreach materials as directed by the CCM..

Task 4 Deliverables:

- Translated Fact Sheets
- Translated Outreach materials.

TASK 5: FINAL OUTREACH MATERIALS

The goal of this task is **to finalize draft materials** produced under Task 3.

The Contractor shall:

- Prepare the final drafts of the outreach materials (as revised to reflect stakeholder comments received under Task 3) and submit them to the CCM for final review and approval.
- Schedule meetings with the CCM and/or Appliance Efficiency Program staff, as directed by the CCM, to take any additional comments on the final draft outreach materials.
- Prepare and submit the Final Outreach Materials based on feedback.
- Provide the compliance outreach template, in consultation with the CCM and Web Team representative, in an application that allows for the electronic translation of the fact sheets into specified foreign languages referenced under Task 5 above.

Task 5 Deliverables:

- Final Draft Outreach Materials
- Compliance Outreach Template
- Final Outreach Materials

DELIVERABLES AND DUE DATES

Task	Deliverable	Due Date
1.1	Kick-off Meeting Agenda (CCM deliverable)	July 11, 2011
1.2	Monthly Progress Reports	Monthly
1.3	Final Report	March 1, 2013
2.1	Draft Technical Assistance Outreach Materials for Manufacturers	October 1, 2011
2.2	Draft Web Based Materials	October 1, 2011
2.3	Draft Outreach Materials for Retailers/ Distributors	October 1, 2011
2.4	Draft Outreach Materials for Consumers	October 1, 2011
3	Revised Outreach Materials	January 30, 2012
	Meeting Presentation Materials	
	Distribution Recommendations	
4	Translated Fact Sheets	February 1, 2012
	Translated Outreach Materials	
5	Final Draft Outreach Materials	March 31, 2012
	Compliance Outreach Template	
		Final Outreach Materials