





**ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS**

**Exhibit A**

**SCOPE OF WORK**

PIR-13-012, Transportation Power, Inc.

**I. TASK AND ACRONYM/TERM LISTS**

**A. Task List**

<b>Task #</b>	<b>CPR<sup>1</sup></b>	<b>Task Name</b>
1		General Project Tasks
2		Auxiliary Power Unit (APU) Design
3		Controls Development
4	X	Natural Gas Hybrid System Design
5		APU Integration and Checkout
6	X	Hybrid System Testing and Optimization
7		Evaluation of Project Benefits
8		Technology/Knowledge Transfer Activities
9		Production Readiness Plan

**B. Acronym/Term List**

<b>Acronym/Term</b>	<b>Meaning</b>
APU	Auxiliary Power Unit
CAD	Computer-Aided Design
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CNG	Compressed Natural Gas
CPR	Critical Project Review
EV	Electric Vehicle
NGPH	Natural Gas Plug-In Hybrid
TAC	Technical Advisory Committee

**II. PURPOSE OF AGREEMENT, PROBLEM/SOLUTION STATEMENT, AND GOALS AND OBJECTIVES**

**A. Purpose of Agreement**

The purpose of this Agreement is to fund the design of a natural gas engine hybrid-electric vehicle that reduces NOx emissions and improves fuel efficiency through hybridization. The Recipient will develop and demonstrate a fully natural gas hybrid-electric Class 8 vehicle.

**B. Problem/ Solution Statement**

**Problem**

Medium and heavy-duty vehicles are critical to California's economy, yet they contribute a significant amount of GHG emissions and consume much of the fuel used in California fleets.

<sup>1</sup> Please see subtask 1.3 in Part III of the Scope of Work (General Project Tasks) for a description of Critical Project Review (CPR) Meetings.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

The California Energy Commission's 2011 Integrated Energy Policy Report anticipates that diesel consumption will continue to grow by 22.3% from 2009 to 2030 due to increased use of diesel in freight.

Class 8 trucks – weighing up to 80,000 lb – are of greatest concern because their energy consumption and emission production is more than all other road vehicles. While various alternative fuel options are available to address these problems, limitations in battery-electric operating range and natural gas engine performance discourage the conversion of diesel trucks to cleaner fuels.

### **Solution**

The Recipient will perform research and development to design an efficient, near-zero emission natural gas-based technology that combines attributes from existing electric propulsion and natural gas engines. Innovative and effective technology will result in trucks with greater operating range, superior performance, and higher fuel economy than pure battery-electric or conventional natural gas trucks. Broad adaptation of natural gas hybrid technology will maximize energy and environmental benefits.

### **C. Goals and Objectives of the Agreement**

#### **Agreement Goals**

The goal of this Agreement is to achieve a proof-of-concept demonstration of new, efficient, and viable natural gas hybrid truck technology that combines cutting-edge electric vehicle (EV) technologies with an innovative new approach to using a small compressed natural gas (CNG) engine as an EV range extender.

#### **Agreement Objectives**

The objectives of this Agreement are to:

- Demonstrate the lowest possible cost integration of two complete natural gas plug-in hybrid (NGPH) Class 8 trucks.
- Demonstrate the greatest possible reductions in emissions and fuel consumption per vehicle.
- Maximize the potential for near-term, large-scale commercialization of NGPH technology.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

### III. TASK 1 GENERAL PROJECT TASKS

#### PRODUCTS

##### Subtask 1.1 Products

The goal of this subtask is to establish the requirements for submitting project products (e.g., reports, summaries, plans, and presentation materials). Unless otherwise specified by the Commission Agreement Manager (CAM), the Recipient must deliver products as required below by the dates listed in the **Project Schedule (Part V)**. Products that require a draft version are indicated by marking “**(draft and final)**” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. With respect to due dates within this Scope of Work, “**days**” means working days.

##### The Recipient shall:

###### For products that require a draft version

- Submit all draft products to the CAM for review and comment in accordance with the Project Schedule (Part V). The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt, unless otherwise specified in the task/subtask for which the product is required.
- Submit the final product to the CAM once agreement has been reached on the draft. The CAM will provide written approval of the final product within 15 days of receipt, unless otherwise specified in the task/subtask for which the product is required.
- If the CAM determines that the final product does not sufficiently incorporate his/her comments, submit the revised product to the CAM within 10 days of notice by the CAM, unless the CAM specifies a longer time period.

###### For products that require a final version only

- Submit the product to the CAM for approval.
- If the CAM determines that the product requires revision, submit the revised product to the CAM within 10 days of notice by the CAM, unless the CAM specifies a longer time period.

###### For all products

- Submit all data and documents required as products in accordance with the following Instructions for Submitting Electronic Files and Developing Software:
  - **Electronic File Format**  
Submit all data and documents required as products under this Agreement in an electronic file format that is fully editable and compatible with the Energy Commission’s software and Microsoft (MS)-operating computing platforms, or with any other format approved by the CAM. Deliver an electronic copy of the full text of any Agreement data and documents in a format specified by the CAM, such as memory stick or CD-ROM.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, **Transportation Power, Inc.**

The following describes the accepted formats for electronic data and documents provided to the Energy Commission as products under this Agreement, and establishes the software versions that will be required to review and approve all software products:

- Data sets will be in MS Access or MS Excel file format (version 2007 or later), or any other format approved by the CAM.
  - Text documents will be in MS Word file format, version 2007 or later.
  - Documents intended for public distribution will be in PDF file format. The Recipient must also provide the native Microsoft file format.
  - Project management documents will be in Microsoft Project file format, version 2007 or later.
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- **Software Application Development**  
Use the following standard Application Architecture components in compatible versions for any software application development required by this Agreement (e.g., databases, models, modeling tools), unless the CAM approves other software applications such as open source programs:
    - Microsoft ASP.NET framework (version 3.5 and up). Recommend 4.0.
    - Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5.
    - Visual Studio.NET (version 2008 and up). Recommend 2010.
    - C# Programming Language with Presentation (UI), Business Object and Data Layers.
    - SQL (Structured Query Language).
    - Microsoft SQL Server 2008, Stored Procedures. Recommend 2008 R2.
    - Microsoft SQL Reporting Services. Recommend 2008 R2.
    - XML (external interfaces).

Any exceptions to the Electronic File Format requirements above must be approved in writing by the CAM. The CAM will consult with the Energy Commission's Information Technology Services Branch to determine whether the exceptions are allowable.

## MEETINGS

### Subtask 1.2 Kick-off Meeting

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

#### The Recipient shall:

- Attend a "Kick-off" meeting with the CAM, the Commission Agreement Officer (CAO), and any other Energy Commission staff relevant to the Agreement. The Recipient will bring its Project Manager and any other individuals designated by the CAM to this meeting. The administrative and technical aspects of the Agreement will be discussed at the meeting. Prior to the meeting, the CAM will provide an agenda to all potential

## ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

### Exhibit A

#### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

meeting participants. The meeting may take place in person or by electronic conferencing (e.g., WebEx), with approval of the CAM.

The administrative portion of the meeting will include discussion of the following:

- Terms and conditions of the Agreement;
- Administrative products (subtask 1.1);
- CPR meetings (subtask 1.3);
- Match fund documentation (subtask 1.7);
- Permit documentation (subtask 1.8);
- Subcontracts (subtask 1.9); and
- Any other relevant topics.

The technical portion of the meeting will include discussion of the following:

- The CAM's expectations for accomplishing tasks described in the Scope of Work;
  - An updated Project Schedule;
  - Technical products (subtask 1.1);
  - Progress reports and invoices (subtask 1.5);
  - Final Report (subtask 1.6);
  - Technical Advisory Committee meetings (subtasks 1.10 and 1.11); and
  - Any other relevant topics.
- Provide an *Updated Project Schedule*, *List of Match Funds*, and *List of Permits*, as needed to reflect any changes in the documents.

#### The CAM shall:

- Designate the date and location of the meeting.
- Send the Recipient a *Kick-off Meeting Agenda*.

#### Recipient Products:

- Updated Project Schedule (*if applicable*)
- Updated List of Match Funds (*if applicable*)
- Updated List of Permits (*if applicable*)

#### CAM Product:

- Kick-off Meeting Agenda

#### Subtask 1.3 Critical Project Review (CPR) Meetings

The goal of this subtask is to determine if the project should continue to receive Energy Commission funding, and if so whether any modifications must be made to the tasks, products, schedule, or budget. CPR meetings provide the opportunity for frank discussions between the Energy Commission and the Recipient. As determined by the CAM, discussions may include project status, challenges, successes, advisory group findings and recommendations, final report preparation, and progress on technical transfer and production readiness activities (if applicable). Participants will include the CAM and the Recipient, and may include the CAO and any other individuals selected by the CAM to provide support to the Energy Commission.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

CPR meetings generally take place at key, predetermined points in the Agreement, as determined by the CAM and as shown in the Task List on page 1 of this Exhibit. However, the CAM may schedule additional CPR meetings as necessary. The budget will be reallocated to cover the additional costs borne by the Recipient, but the overall Agreement amount will not increase. CPR meetings generally take place at the Energy Commission, but they may take place at another location, or may be conducted via electronic conferencing (e.g., WebEx) as determined by the CAM.

#### The Recipient shall:

- Prepare a *CPR Report* for each CPR meeting that: (1) discusses the progress of the Agreement toward achieving its goals and objectives; and (2) includes recommendations and conclusions regarding continued work on the project.
- Submit the CPR Report along with any other *Task Products* that correspond to the technical task for which the CPR meeting is required (i.e., if a CPR meeting is required for Task 2, submit the Task 2 products along with the CPR Report).
- Attend the CPR meeting.
- Present the CPR Report and any other required information at each CPR meeting.

#### The CAM shall:

- Determine the location, date, and time of each CPR meeting with the Recipient's input.
- Send the Recipient a *CPR Agenda* and a *List of Expected CPR Participants* in advance of the CPR meeting. If applicable, the agenda will include a discussion of match funding and permits.
- Conduct and make a record of each CPR meeting. Provide the Recipient with a *Schedule for Providing a Progress Determination* on continuation of the project.
- Determine whether to continue the project, and if so whether modifications are needed to the tasks, schedule, products, or budget for the remainder of the Agreement. If the CAM concludes that satisfactory progress is not being made, this conclusion will be referred to the Deputy Director of the Energy Research and Development Division.
- Provide the Recipient with a *Progress Determination* on continuation of the project, in accordance with the schedule. The Progress Determination may include a requirement that the Recipient revise one or more products.

#### Recipient Products:

- CPR Report(s)
- Task Products (draft and/or final as specified in the task)

#### CAM Products:

- CPR Agenda
- List of Expected CPR Participants
- Schedule for Providing a Progress Determination
- Progress Determination

#### Subtask 1.4 Final Meeting

The goal of this subtask is to complete the closeout of this Agreement.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

#### The Recipient shall:

- Meet with Energy Commission staff to present project findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement. This meeting will be attended by the Recipient and CAM, at a minimum. The meeting may occur in person or by electronic conferencing (e.g., WebEx), with approval of the CAM.

The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be divided into two separate meetings at the CAM's discretion.

- The technical portion of the meeting will involve the presentation of findings, conclusions, and recommended next steps (if any) for the Agreement. The CAM will determine the appropriate meeting participants.
- The administrative portion of the meeting will involve a discussion with the CAM and the CAO of the following Agreement closeout items:
  - Disposition of any state-owned equipment.
  - Need to file a Uniform Commercial Code Financing Statement (Form UCC-1) regarding the Energy Commission's interest in patented technology.
  - The Energy Commission's request for specific "generated" data (not already provided in Agreement products).
  - Need to document the Recipient's disclosure of "subject inventions" developed under the Agreement.
  - "Surviving" Agreement provisions such as repayment provisions and confidential products.
  - Final invoicing and release of retention.
- Prepare a *Final Meeting Agreement Summary* that documents any agreement made between the Recipient and Commission staff during the meeting.
- Prepare a *Schedule for Completing Agreement Closeout Activities*.
- Provide *All Draft and Final Written Products* on a CD-ROM or USB memory stick, organized by the tasks in the Agreement.

#### Products:

- Final Meeting Agreement Summary (*if applicable*)
- Schedule for Completing Agreement Closeout Activities
- All Draft and Final Written Products

## REPORTS AND INVOICES

### Subtask 1.5 Progress Reports and Invoices

The goals of this subtask are to: (1) periodically verify that satisfactory and continued progress is made towards achieving the project objectives of this Agreement; and (2) ensure that invoices contain all required information and are submitted in the appropriate format.

#### The Recipient shall:

- Submit a monthly *Progress Report* to the CAM. Each progress report must:
  - Summarize all Agreement activities conducted by the Recipient for the preceding

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

month, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. See the Progress Report Format Attachment for the recommended specifications.

- Provide a synopsis of the project progress, including accomplishments, problems, milestones, products, schedule, fiscal status, and any evidence of progress such as photographs.
- Submit a monthly or quarterly *Invoice* that follows the instructions in the “Payment of Funds” section of the terms and conditions. In addition, each invoice must document and verify:
  - Energy Commission funds received by California-based entities;
  - Energy Commission funds spent in California (*if applicable*); and
  - Match fund expenditures.

#### Products:

- Progress Reports
- Invoices

#### Subtask 1.6 Final Report

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, results, and conclusions of the work performed under this Agreement. The CAM will review and approve the Final Report, which will be due at least **two months** before the Agreement end date. When creating the Final Report Outline and the Final Report, the Recipient must use a Style Manual provided by the CAM.

#### Subtask 1.6.1 Final Report Outline

##### The Recipient shall:

- Prepare a *Final Report Outline* in accordance with the *Style Manual* provided by the CAM.
- Submit a draft of the outline to the CAM for review and comment.
- Once agreement has been reached on the draft, submit the final outline to the CAM. The CAM will provide written approval of the final outline within 10 days of receipt.

##### Recipient Products:

- Final Report Outline (draft and final)

##### CAM Product:

- Style Manual

#### Subtask 1.6.2 Final Report

##### The Recipient shall:

- Prepare a *Final Report* for this Agreement in accordance with the approved Final Report Outline and the Style Manual provided by the CAM.
- Submit a draft of the report to the CAM for review and comment. Once agreement on the draft report has been reached, the CAM will forward the electronic version for Energy Commission internal approval. Once the CAM receives approval, he/she will provide

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

written approval to the Recipient.

- Submit one bound copy of the Final Report to the CAM.

#### Products:

- Final Report (draft and final)

### **MATCH FUNDS, PERMITS, AND SUBCONTRACTS**

#### **Subtask 1.7 Match Funds**

The goal of this subtask is to ensure that the Recipient obtains any match funds planned for this Agreement and applies them to the Agreement during the Agreement term.

While the costs to obtain and document match funds are not reimbursable under this Agreement, the Recipient may spend match funds for this task. The Recipient may only spend match funds during the Agreement term, either concurrently or prior to the use of Energy Commission funds. Match funds must be identified in writing, and the Recipient must obtain any associated commitments before incurring any costs for which the Recipient will request reimbursement.

#### **The Recipient shall:**

- Prepare a *Match Funds Status Letter* that documents the match funds committed to this Agreement. 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 this in the letter.

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 cash match funds, their source(s) (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied.
  - The amount of each in-kind contribution, a description of the contribution type (e.g., property, services), the documented market or book value, the 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 Recipient must identify its owner and provide a contact name, address, telephone number, and the address where the property is located.
- A copy of a letter of commitment from an authorized representative of each source of match funding that the funds or contributions have been secured.
- At the Kick-off meeting, discuss match funds and the impact on the project if they are significantly reduced or not obtained as committed. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide a *Supplemental Match Funds Notification Letter* to the CAM of receipt of additional match funds.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

- Provide a *Match Funds Reduction Notification Letter* to the CAM if existing match funds are reduced during the course of the Agreement. Reduction of match funds may trigger a CPR meeting.

#### Products:

- Match Funds Status Letter
- Supplemental Match Funds Notification Letter (*if applicable*)
- Match Funds Reduction Notification Letter (*if applicable*)

#### Subtask 1.8 Permits

The goal of this subtask is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track. Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement, with the exception of costs incurred by University of California recipients. Permits must be identified and obtained before the Recipient may incur any costs related to the use of the permit(s) for which the Recipient will request reimbursement.

#### The Recipient shall:

- Prepare a *Permit Status Letter* that documents the permits required to conduct this Agreement. If no permits are required at the start of this Agreement, then state this in the letter. If permits will be required during the course of the Agreement, provide in the letter:
  - A list of the permits that identifies: (1) the type of permit; and (2) the name, address, and telephone number of the permitting jurisdictions or lead agencies.
  - The schedule the Recipient will follow in applying for and obtaining the permits.

The list of permits and the schedule for obtaining them will be discussed at the Kick-off meeting (subtask 1.2), and a timetable for submitting the updated list, schedule, and copies of the permits will be developed. The impact on the project 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 progress reports and will be a topic at CPR meetings.

- If during the course of the Agreement additional permits become necessary, then provide the CAM with an *Updated List of Permits* (including the appropriate information on each permit) and an *Updated Schedule for Acquiring Permits*.
- Send the CAM a *Copy of Each Approved Permit*.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM within 5 days. Either of these events may trigger a CPR meeting.

#### Products:

- Permit Status Letter
- Updated List of Permits (*if applicable*)
- Updated Schedule for Acquiring Permits (*if applicable*)
- Copy of each Approved Permit (*if applicable*)

#### Subtask 1.9 Subcontracts

The goals of this subtask are to: (1) procure subcontracts required to carry out the tasks under this Agreement; and (2) ensure that the subcontracts are consistent with the terms and conditions of this Agreement.

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

#### The Recipient shall:

- Manage and coordinate subcontractor activities in accordance with the requirements of this Agreement.
- Incorporate this Agreement by reference into each subcontract.
- Include any required Energy Commission flow-down provisions in each subcontract, in addition to a statement that the terms of this Agreement will prevail if they conflict with the subcontract terms.
- If required by the CAM, submit a draft of each *Subcontract* required to conduct the work under this Agreement.
- Submit a final copy of the executed subcontract.
- Notify and receive written approval from the CAM prior to adding any new subcontractors (see the discussion of subcontractor additions in the terms and conditions).

#### Products:

- Subcontracts (*draft if required by the CAM*)

### **TECHNICAL ADVISORY COMMITTEE**

#### **Subtask 1.10 Technical Advisory Committee (TAC)**

The goal of this subtask is to create an advisory committee for this Agreement. The TAC should be composed of diverse professionals. The composition will vary depending on interest, availability, and need. TAC members will serve at the CAM's discretion. The purpose of the TAC is to:

- Provide guidance in project direction. The guidance may include scope and methodologies, timing, and coordination with other projects. The guidance may be based on:
  - Technical area expertise;
  - Knowledge of market applications; or
  - Linkages between the agreement work and other past, present, or future projects (both public and private sectors) that TAC members are aware of in a particular area.
- Review products and provide recommendations for needed product adjustments, refinements, or enhancements.
- Evaluate the tangible benefits of the project to the state of California, and provide recommendations as needed to enhance the benefits.
- Provide recommendations regarding information dissemination, market pathways, or commercialization strategies relevant to the project products.

The TAC may be composed of qualified professionals spanning the following types of disciplines:

- Researchers knowledgeable about the project subject matter;
- Members of trades that will apply the results of the project (e.g., designers, engineers, architects, contractors, and trade representatives);
- Public interest market transformation implementers;
- Product developers relevant to the project;

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

- U.S. Department of Energy research managers, or experts from other federal or state agencies relevant to the project;
- Public interest environmental groups;
- Utility representatives;
- Air district staff; and
- Members of relevant technical society committees.

#### **The Recipient shall:**

- Prepare a *List of Potential TAC Members* that includes the names, companies, physical and electronic addresses, and phone numbers of potential members. The list will be discussed at the Kick-off meeting, and a schedule for recruiting members and holding the first TAC meeting will be developed.
- Recruit TAC members. Ensure that each individual understands member obligations and the TAC meeting schedule developed in subtask 1.11.
- Prepare a *List of TAC Members* once all TAC members have committed to serving on the TAC.
- Submit *Documentation of TAC Member Commitment* (such as Letters of Acceptance) from each TAC member.

#### **Products:**

- List of Potential TAC Members
- List of TAC Members
- Documentation of TAC Member Commitment

#### **Subtask 1.11 TAC Meetings**

The goal of this subtask is for the TAC to provide strategic guidance for the project by participating in regular meetings, which may be held via teleconference.

#### **The Recipient shall:**

- Discuss the TAC meeting schedule with the CAM at the Kick-off meeting. Determine the number and location of meetings (in-person and via teleconference) in consultation with the CAM.
- Prepare a *TAC Meeting Schedule* that will be presented to the TAC members during recruiting. Revise the schedule after the first TAC meeting to incorporate meeting comments.
- Prepare a *TAC Meeting Agenda* and *TAC Meeting Back-up Materials* for each TAC meeting.
- Organize and lead TAC meetings in accordance with the TAC Meeting Schedule. Changes to the schedule must be pre-approved in writing by the CAM.
- Prepare *TAC Meeting Summaries* that include any recommended resolutions of major TAC issues.

#### **Products:**

- TAC Meeting Schedule (draft and final)
- TAC Meeting Agendas (draft and final)
- TAC Meeting Back-up Materials
- TAC Meeting Summaries

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

#### IV. TECHNICAL TASKS

*Products that require a draft version are indicated by marking “(draft and final)” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. **Subtask 1.1 (Products)** describes the procedure for submitting products to the CAM.*

#### **TASK 2 Auxiliary Power Unit (APU) Design**

The goal of this task is to develop a design for the natural gas-burning APU to be used in the NGPH system.

##### **The Recipient shall:**

- Define specific APU operating requirements (i.e. power output and operating voltage).
- Obtain detailed information on the selected Ford 3.7 liter engine.
- Select the appropriate electric generator for use with the Ford 3.7 liter engine.
- Design the engine-generator coupling, mounting, and other related hardware.
- Prepare an *APU Design Package* that includes but is not limited to the following:
  - Computer-Aided Design (CAD) Drawings
  - Bill of Materials
  - Preliminary Assembly Procedures

##### **Products:**

- APU Design Package

#### **TASK 3 Controls Development**

The goal of this task is to develop controls and control software that will regulate the operation of the APU and NGPH system.

##### **The Recipient shall:**

- Develop a theory of operation for the NGPH system.
- Perform analyses and trade studies to evaluate alternative vehicle and subsystem control methods.
- Select microprocessor-based control and other hardware to be utilized in the NGPH system.
- Use Argonne National Laboratory’s AUTONOMIE simulation to tool help evaluate and optimize engine and hybrid system performance. Generate *Simulation Results*.
- Develop vehicle and subsystem control software using models-based controls methods.
- Generate *Hybrid Controls Architecture* that discusses the selection process of microprocessor-based control hardware and development of vehicle and subsystem control software.
- Perform testing on a water-brake dynamometer to help verify and optimize controls.

##### **Products:**

- Simulation Results
- Hybrid Controls Architecture

## ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

### Exhibit A

#### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

#### **TASK 4 Natural Gas Hybrid System Design**

The goal of this task is to complete the integrated design of the natural gas plug-in hybrid (PGPH) system to be built and tested under this project.

##### **The Recipient shall:**

- Use its “ElecTruck™” battery-electric drive system as a platform for developing an integrated hybrid system design.
- Identify and evaluate alternative physical integration options, including but not limited to: APU location, placement of natural gas fuel tanks, and ESS right-sizing and downsizing.
- Develop an *Integrated Natural Gas Hybrid System Design Layout* detailing the integration of new hybrid drive hardware with pre-existing ElecTruck™ components.
- Prepare a *CPR Report* as per Subtask 1.3 (CPR Meetings).
- Participate in a CPR meeting.

##### **Products:**

- Integrated Natural Gas Hybrid System Design Layout
- CPR Report

#### **TASK 5 APU Integration and Checkout**

The goal of this task is to complete the integration of the APU, fuel system, and related components into two Class 8 test trucks.

##### **The Recipient shall:**

- Manufacture a natural gas hybrid truck (Truck #1) using the Recipient’s “ElecTruck™” battery-electric drive system augmented with developed APU and controls (per Tasks 2 and 3) that is in accordance with the integrated hybrid system design per Task 4.
- Generate an *Interim Commissioning Report* that describes operating results and lessons learned following the commissioning and initial testing of Truck #1.
- Manufacture a second natural gas hybrid truck (Truck #2) using an existing battery-electric truck from the Recipient’s Electric Drayage Demonstration project as a starting point.
- Generate a *Final Commissioning Report* that describes operating results and lessons learned following the commissioning and testing of Truck #2.

##### **Products:**

- Commissioning Report (Interim and Final)

#### **TASK 6 Hybrid System Testing and Optimization**

The goal of this task is to complete the testing and optimization of the NGPH system developed under this project.

##### **The Recipient shall:**

- Assemble a water-brake dynamometer-based test cell to be used for the initial testing of components and systems developed under this project.

## ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

### Exhibit A

#### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

- Utilize the water-brake dynamometer-based test cell to support the initial testing of hybrid system controls and APU-related components including emission evaluations at APU operating points consistent with drayage service.
- Test operating integrated natural gas hybrid systems in two different Class 8 trucks either by simulation or drayage service, if practical, near the Ports of Long Beach and Los Angeles.
- Generate a *Hybrid System Test Report* that includes but is not limited to the following:
  - Methods, results, and discussion of water-brake dynamometer-based test cell testing of: (1) components and systems developed under this project; and (2) hybrid system controls and APU-related components included emission evaluations at APU operating points consisted with drayage service.
  - Methods, results, and discussion from testing operating integrated natural gas hybrid systems in two different Class 8 trucks.
- Prepare a *CPR Report* in accordance with subtask 1.3 (CPR Meetings).
- Participate in a CPR meeting.

#### Products:

- Photos of Water-break Dynamometer
- Hybrid System Test Report (draft and final)
- CPR Report

#### TASK 7 Evaluation of Project Benefits

The goal of this task is to report the benefits resulting from this project.

#### The Recipient shall:

- Complete three Project Benefits Questionnaires that correspond to three main intervals in the Agreement: (1) *Kick-off Meeting Benefits Questionnaire*; (2) *Mid-term Benefits Questionnaire*; and (3) *Final Meeting Benefits Questionnaire*.
- Provide all key assumptions used to estimate projected benefits, including targeted market sector (e.g., population and geographic location), projected market penetration, baseline and projected energy use and cost, operating conditions, and emission reduction calculations. Examples of information that may be requested in the questionnaires include:
  - For Product Development Projects and Project Demonstrations:
    - Published documents, including date, title, and periodical name.
    - Estimated or actual energy and cost savings, and estimated statewide energy savings once market potential has been realized. Identify all assumptions used in the estimates.
    - Greenhouse gas and criteria emissions reductions.
    - Other non-energy benefits such as reliability, public safety, lower operational cost, environmental improvement, indoor environmental quality, and societal benefits.
    - Data on potential job creation, market potential, economic development, and increased state revenue as a result of the project.

## ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

### Exhibit A

#### SCOPE OF WORK

#### PIR-13-012, Transportation Power, Inc.

- A discussion of project product downloads from websites, and publications in technical journals.
- A comparison of project expectations and performance. Discuss whether the goals and objectives of the Agreement have been met and what improvements are needed, if any.
- Additional Information for Product Development Projects:
  - Outcome of product development efforts, such copyrights and license agreements.
  - Units sold or projected to be sold in California and outside of California.
  - Total annual sales or projected annual sales (in dollars) of products developed under the Agreement.
  - Investment dollars/follow-on private funding as a result of Energy Commission funding.
  - Patent numbers and applications, along with dates and brief descriptions.
- Additional Information for Product Demonstrations:
  - Outcome of demonstrations and status of technology.
  - Number of similar installations.
  - Jobs created/retained as a result of the Agreement.
- For Information/Tools and Other Research Studies:
  - Outcome of project.
  - Published documents, including date, title, and periodical name.
  - A discussion of policy development. State if the project has been cited in government policy publications or technical journals, or has been used to inform regulatory bodies.
  - The number of website downloads.
  - An estimate of how the project information has affected energy use and cost, or have resulted in other non-energy benefits.
  - An estimate of energy and non-energy benefits.
  - Data on potential job creation, market potential, economic development, and increased state revenue as a result of project.
  - A discussion of project product downloads from websites, and publications in technical journals.
  - A comparison of project expectations and performance. Discuss whether the goals and objectives of the Agreement have been met and what improvements are needed, if any.
- Respond to CAM questions regarding responses to the questionnaires.

*The Energy Commission may send the Recipient similar questionnaires after the Agreement term ends. Responses to these questionnaires will be voluntary.*

#### **Products:**

- Kick-off Meeting Benefits Questionnaire
- Mid-term Benefits Questionnaire
- Final Meeting Benefits Questionnaire

# ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

## Exhibit A

### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

#### TASK 8 Technology/Knowledge Transfer Activities

*The goal of this task is to develop a plan to make the knowledge gained, experimental results, and lessons learned available to the public and key decision makers.*

##### The Recipient shall:

- Prepare an *Initial Fact Sheet* at start of the project that describes the project. Use the format provided by the CAM.
- Prepare a *Final Project Fact Sheet* at the project's conclusion that discusses results. Use the format provided by the CAM.
- Prepare a *Technology/Knowledge Transfer Plan* that includes:
  - An explanation of how the knowledge gained from the project will be made available to the public, including the targeted market sector and potential outreach to end users, utilities, regulatory agencies, and others.
  - A description of the intended use(s) for and users of the project results.
  - Published documents, including date, title, and periodical name.
  - Copies of documents, fact sheets, journal articles, press releases, and other documents prepared for public dissemination. These documents must include the Legal Notice required in the terms and conditions. Indicate where and when the documents were disseminated.
  - A discussion of policy development. State if project has been or will be cited in government policy publications, or used to inform regulatory bodies.
  - The number of website downloads or public requests for project results.
  - Additional areas as determined by the CAM.
- Conduct technology transfer activities in accordance with the Technology/Knowledge Transfer Plan. These activities will be reported in the Progress Reports.
- When directed by the CAM, develop *Presentation Materials* for an Energy Commission-sponsored conference/workshop on the results of the project.
- Prepare a *Technology/Knowledge Transfer Report* on technology transfer activities conducted during the project.

##### Products:

- Initial Fact Sheet (draft and final)
- Final Project Fact Sheet (draft and final)
- Presentation Materials (draft and final)
- Technology/Knowledge Transfer Plan (draft and final)
- Technology/Knowledge Transfer Report (draft and final)

#### TASK 9 Production Readiness Plan

The goal of this task is to determine the steps that will lead to the manufacturing of technologies developed in this project or to the commercialization of the project's results.

##### The Recipient shall:

- Prepare a *Production Readiness Plan*. The degree of detail in the plan should be proportional to the complexity of producing or commercializing the proposed product,

## ENERGY RESEARCH, DEVELOPMENT, AND DEMONSTRATION GRANTS

### Exhibit A

#### SCOPE OF WORK

PIR-13-012, Transportation Power, Inc.

and to its state of development. As appropriate, the plan will discuss the following:

- Critical production processes, equipment, facilities, personnel resources, and support systems needed to produce a commercially viable product.
- Internal manufacturing facilities, supplier technologies, capacity constraints imposed by the design under consideration, design-critical elements, and the use of hazardous or non-recyclable materials. The product manufacturing effort may include “proof of production processes.”
- The estimated cost of production.
- The expected investment threshold needed to launch the commercial product.
- An implementation plan to ramp up to full production.
- The outcome of product development efforts, such as copyrights and license agreements.
- Patent numbers and applications, along with dates and brief descriptions.
- Other areas as determined by the CAM.

#### **Products:**

- Production Readiness Plan (draft and final)

## V. PROJECT SCHEDULE

*(See the attached budget Excel spreadsheet)*

To: Office of Planning and Research  
PO Box 3044, 1400 Tenth Street, Room 222  
Sacramento, CA 95812-3044

From: California Energy Commission  
1516 Ninth Street, MS-48  
Sacramento, CA 95814

Project Title: Development of Natural Gas Plug-In Hybrid Class 8 Trucks

Project Location – Specific: 13000 Danielson Street

Project Location – City: Poway, CA Project Location – County: San Diego

**Description of Project:**

Transportation Power, Inc. will develop and demonstrate a natural gas plug-in hybrid technology by cost-effectively manufacturing and deploying two natural gas plug-in hybrid Class 8 trucks. Transportation Power, Inc.'s existing SCAQMD project will supply an initial test vehicle that will serve as the first mobile test bed for measuring engine and overall drive system performance and efficiency. Transportation Power, Inc. will acquire, test, and characterize a lightweight Ford 3.7L engine, which will first be tested on a water-brake dynamometer with other components of TransPower's "ElecTruck" drive system. The system will then be validated for basic vehicle functionality in the SCAQMD-funded truck, and lessons learned from this testing will be incorporated into the design of the second hybrid truck.

Transportation Power, Inc. will design an APU using a lightweight automotive CNG engine, using SolidWorks Computer-Aided Design (CAD) and other software tools. APU controls, optimized for operation of the APU as an EV range extender, will be developed using Matlab/Simulink and other advanced models-based controls development tools. A natural gas hybrid system design will result in adaptation of TransPower's existing ElecTruck battery-EV system to accommodate a hybrid range extension subsystem using such an APU. The APU and ancillary components, such as the CNG fuel system, will be installed on the two demonstration vehicles. The demonstration vehicles will then be road tested and operating data will be collected and analyzed and the natural gas hybrid system will be optimized based on the data results.

Name of Public Agency Approving Project: California Energy Commission

Name of Person or Agency Carrying Out Project: Transportation Power, Inc.

**Exempt Status:** *(check one)*

- Ministerial (Sec. 21080(b)(1); 15268);
- Declared Emergency (Sec. 21080(b)(3); 15269(a));
- Emergency Project (Sec. 21080(b)(4); 15269(b)(c));
- Categorical Exemption. State type and section number 14 CCR Section 15306
- Statutory Exemptions. State code number. \_\_\_\_\_
- Common Sense Exemption. 15061(b)(3)

**Reasons why project is exempt:**

The project involves the design, testing, and analysis of a natural gas hybrid electric technology.

**Lead Agency**

Contact Person: Pilar Magana Area code/Telephone/Ext: 916-327-2216

**If filed by applicant:**

1. Attach certified document of exemption finding.
2. Has a Notice of Exemption been filed by the public agency approving the project?  Yes  No

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Signed by Lead Agency**

**Signed by Applicant**

**Date received for filing at OPR:** \_\_\_\_\_

RESOLUTION NO:

STATE OF CALIFORNIA

STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: TRANSPORTATION POWER, INC.

**RESOLVED**, that the State Energy Resources Conservation and Development Commission (Energy Commission) adopts the staff CEQA findings contained in the CEC 94 Contract Request Form or CEC 270 Grant Request Form (as applicable).

**RESOLVED**, that the Energy Commission approves Agreement PIR-13-012 with **Transportation Power, Inc.** for a \$900,000 grant for the development and demonstration of an efficient and viable natural gas plug-in hybrid truck technology that combines electronic vehicle technologies with a natural gas engine plug-in hybrid Class 8 truck.

**FURTHER BE IT RESOLVED**, that the Executive Director shall execute the same on behalf of the Energy Commission.

**CERTIFICATION**

The undersigned Secretariat to the Commission does hereby certify that the foregoing is a full, true, and correct copy of a Resolution duly and regularly adopted at a meeting of the California Energy Commission held on June 18, 2014.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

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Harriet Kallemeyn,  
Secretariat