Limit the response to **10** pages. See the formatting requirements in Part III, Section A.

1. **Technical Merit and Need**
2. The proposed project provides a clear and concise description of the technological, scientific knowledge advancement, and/or innovation that will overcome barriers to achieving the State’s statutory energy goals.

For Applications with Applied Research and Development and/or Technology Demonstration and Deployment activities:

1. Describes the competitive advantages of the proposed technology over state-of-the-art (e.g., efficiency, emissions, durability, cost).
2. Provides the proposed technical specifications and describe how the project will meet or exceed the technical specifications by the end of the project.
3. Describes the technology readiness level (TRL) the proposed technology has achieved and the expected TRL by the end of the project.

For Applications with Technology Demonstration and Deployment activities:

1. Describes at what scale the technology has been successfully demonstrated, including size or capacity, number of previous installations, location and duration, results, etc.
2. Describes how the proposed demonstration will lead to increased adoption of the technology in California.

For applications with Non-Technology Development (e.g. Modeling and forecasting, map and tool development, scientific and techno-economic analysis, market facilitation, etc.) activities:

1. Describe how the proposed model/tool/study will be used by key stakeholders (e.g. policy-makers, project developers, other researchers, etc.).
2. Describes the advantage of the proposed model/tool/study over that currently being used by key stakeholders.
3. **Technical Approach**
4. Proposal describes the technique, approach, and methods to be used in performing the work described in the Scope of Work.
5. Provides a clear and concise description of the goals, objectives, technological or scientific knowledge advancement, and innovation in the proposed project.
6. Proposal identifies the reliability that the project and site recommendations as described will be carried out if funds are awarded.
7. Identifies and discusses factors critical for success, in addition to risks, barriers, and limitations (e.g. loss of demonstration site, key subcontractor). Provides a plan to address them.
8. Discusses the degree to which the proposed work is technically feasible and achievable within the proposed Project Schedule and the key activities schedule in Section I.E.
9. (For technology projects) Describes the technology transfer plan to assess and advance the commercial viability of the technology.
10. (For non-technology projects) Describes the knowledge transfer plan, including how key stakeholders and potential users will be engaged, and the plan to disseminate knowledge of the project’s results to those stakeholders and users.

For applications with Technology Demonstration and Deployment activities:

1. Provides a clear and plausible measurement and verification plan that describes how energy savings and other benefits specified in the application will be determined and measured.
2. Provides information documenting progress towards achieving compliance with the California Environmental Quality Act (CEQA) by addressing the areas in Section I.I and Section III.C.5
3. **Impacts and Benefits to California IOU Ratepayers**
   1. Explains how the proposed project will benefit California Investor-Owned Utility (IOU) ratepayers and provides clear, plausible, and justifiable (quantitative preferred) potential benefits. Estimates the energy benefits including:

* annual electricity, energy cost reductions, peak load reduction and/or shifting, infrastructure resiliency, infrastructure reliability.

In addition, estimates the non-energy benefits including:

* greenhouse gas emission reductions, air emission reductions (e.g. NOx), water savings and cost reduction, and/or increased safety.
  1. States the timeframe, assumptions with sources, and calculations for the estimated benefits, and explains their reasonableness. Include baseline or “business as usual” over timeframe.

For applications with Applied Research and Development and/or TD&D activities:

* 1. Explains the path-to-market strategy including near-term (i.e. initial target markets), mid-term, and long-term markets for the technology, size and penetration or deployment rates, and underlying assumptions.

For applications with Technology Demonstration and Deployment activities:

* 1. Identifies the expected financial performance (e.g. payback period, ROI) of the demonstration at scale.
  2. Identifies the specific programs which the technology intends to leverage. (e.g. feed-in tariffs, IOU rebates, demand response, storage procurement) and extent to which technology meets program requirements.

For applications with Non-Technology Development (e.g. Modeling and forecasting, map and tool development, scientific and techno-economic analysis, market facilitation, etc.) activities:

* 1. Identifies how outputs of the model/tool/study will benefit key stakeholders (e.g., streamline planning, help eliminate barriers, stimulate growth of applicable market sectors).

1. **Team Qualifications, Capabilities, and Resources**

Evaluations of ongoing or previous projects including project performance by applicant and team members will be used in scoring for this criterion. This can include contacting references.

1. Identifies credentials of prime and any subcontractor key personnel, including the project manager, principal investigator and technology and knowledge transfer lead (include this information in the Project Team Form).
2. Demonstrates that the project team has appropriate qualifications, experience, financial stability and capability to complete the project.
3. Explains the team structure and how various tasks will be managed and coordinated.
4. Describes the facilities, infrastructure, and resources available that directly support the project.
5. Describes the team’s history of successfully completing projects in the past 10 years including subsequent deployments and commercialization.
6. **EPIC and Federal Funds Spent in California**

Points for this section will be assigned based on the formula and table in the Scoring Criteria section of the solicitation manual.

1. **Budget and Cost-Effectiveness**
2. Budget forms are complete as instructed in Section III.
3. Justifies the reasonableness of the requested funds relative to the project goals, objectives, and tasks.
4. Justifies the reasonableness of direct costs (e.g., labor, fringe benefits, equipment, materials & misc. travel, and subcontractors).
5. Justifies the reasonableness of indirect costs (e.g., overhead, facility charges (e.g., rent, utilities), burdens, subcontractor profit, and other like costs).
6. Explains how the applicant will maximize funds for technical tasks necessary to achieve the milestones described in the Project Narrative and minimize expenditure of funds for program administration and overhead.