**GFO-20-305**

**The Next EPIC Challenge: Reimagining Affordable Mixed-Use Development in a Carbon-Constrained Future**

**Addendum 14**

**May 24, 2023**

The purpose of this addendum is to provide further clarification and revisions within the solicitation manual. In addition, the addendum includes modifications to the Project Narrative form, Attachment 6, to reflect Build Phase evaluation criteria.

Revisions to the solicitation manual include the following:

* Removal of the “Case Study” from the required Build Phase application deliverables (the Project Case Study Plan and Project Case Study are still required deliverables under the Technology/Knowledge Transfer Activities Task in the Scope of Work).
* Removal of references to a “Showcase Event.”
* Revised the qualification for funding amounts for the build phase listed in Table 9 to be based on whether the development is in a designated low-income or disadvantaged community as opposed to number of bedrooms.
* Added (2) attachments to be used for the Build Phase application: Attachment 16 – Energy and Emissions Performance Workbook, and Attachment 17 – Zero-Emission Cost Benefit Analysis Report Guidelines
* Update the Build Phase Selection Rubric to include “Project Team Readiness” as a sub-criteria under the “Construction Readiness” criteria (Table 19),
* Updated the Detailed Build Phase Selection Evaluation Criteria (Table 24) for clarity.

The addendum includes the following revisions to the Solicitation Manual. Added language appears in **bold underlined** font. Deleted language appears in ~~strikethrough~~ and within square brackets.

## **Solicitation Manual**

1. **Page 10, Section I.C.3. Design Phase Implementation**

Amended to read:

Projects selected and funded for the Design Phase will be asked to complete and submit the following deliverables to be eligible for the Build Phase:

* Conceptual drawings, design plans, and an architectural-scale model of the development.
* Software modeling **results** of the development’s expected energy and emissions performance and impacts on tenants’ energy bills.
* [~~A case study of the design phase to document the planning, design, and community engagement process.~~]
* A description of the emerging technologies and strategies proposed to be used in the build-out and why they were chosen.
* An analysis of the estimated cost difference between the zero-emission build-out compared to standard building design, construction, and operations.
* A community engagement plan to solicit input from the community throughout the design process.
* Two-minute video of the project concept**.** [~~that will air at the Showcase Event.~~]
1. **Page 10, Section I.C.4. Build Phase Selection**

Amended to read:

The end of the Design Phase essentially contains part of the competition for the Build Phase. Design Phase grant recipients will prepare all of the necessary application documents, which will be evaluated. A second Notice of Proposed Award (NOPA) and second Energy Commission Business Meeting vote will occur. The Commission will approve the four winners to move to the Build Phase and receive up to $9 million each to build out their concept. The Build Phase application and selection process and timeline are outlined in Table 6.

[~~In addition, the CEC will sponsor a one-day event to showcase project designs from the Design Phase. This showcase event will also serve as the vehicle to announce the projects that will be selected for the non-monetary awards.~~]

To explain, Design Phase project teams will submit the following Design Phase deliverables to the CEC as part of their Build Phase application:

* Conceptual drawings, design plans, and photos **or illustrations** of an architectural-scale model of the project. [~~The actual architectural-scale models will be on display during the team’s project presentation at the event, as well as during a model showcase networking session.~~]
* Energy and emissions performance model
* [~~Case Study~~]
* Description of the emerging technologies proposed to be used
* [~~Cost Analysis~~] **Zero-Emission Cost Benefit Analysis Report**
* Community engagement plan
* Project video
* The following proposal attachments:
	+ Attachment 4 - EPIC Application Form (i.e., Design Phase application, confirmed and/or amended, as necessary, for the Build Phase)
	+ Attachment 5 - EPIC Executive Summary (i.e., Design Phase application, confirmed and/or amended, as necessary, for the Build Phase)
	+ Attachment 6 - EPIC Project Narrative [~~(i.e., Design Phase application, confirmed and/or amended, as necessary, for the Build Phase)~~]
	+ Attachment 7 – Project Team Form
	+ Attachment 8 – Scope of Work
	+ Attachment 9 – Project Schedule
	+ Attachment 10 – Budget
	+ Attachment 11 – CEQA Compliance Form (Must be filled out again, to reflect at a minimum: (a) changes in the proposed project and (b) any changed external circumstances that are relevant to the prior environmental impact analysis.) (Applicant must confer with Lead Agency, if proposed project has increased in magnitude or changed in a way that is relevant to the prior environmental impact analysis..)
	+ Attachment 12 – References and Work Product Form
	+ Attachment 13 – Commitment and Support Letters
	+ Attachment 14 – Project Performance Metrics
	+ Attachment 15 -- Applicant Declaration (must be filled out again)
	+ **Attachment 16 – Energy and Emissions Performance Workbook**
	+ **Attachment 17 - Zero-Emission Cost Benefit Analysis Report Guidelines (used for guidance only, this document is not to be submitted)**
	+ Any additional documents necessary for the Agreement amendment package

A distinguished panel of judges and/or Evaluation Committee members will form the Evaluation Committee for the Build Phase. The Committee will recommend four Recipients under the Build Phase for approval by the Energy Commission, based on the scoring rubric (see Section IV.H for the Build Phase scoring rubric). In addition, non-monetary awards – such as “People’s Choice” and “Most Innovative Architectural Design” – will be given. Technical reviewers will be assigned for each of the selection criteria. The technical reviewers will review each of the designs and provide their assessments. The Build Phase Evaluation Committee will use these assessments as part of their recommendations.

Table 6: Timeline for the Build Phase Application and Selection Process

|  |  |
| --- | --- |
| **Timeline** | **Activity** |
| 8 weeks before the Notice of Proposed Award (NOPA) | * Project teams submit their application materials for the Build Phase to the CEC.
* CEC staff provides the Build Phase application materials to Technical Reviewers with expertise in the evaluation criteria shown in Table 5.
 |
| 5 weeks before the NOPA  | * Technical reviewers provide their reviews to CEC staff.
* CEC staff provides the technical reviews along with the Build Phase application materials to the panel of judges and/or Evaluation Committee members.
* Judges and/or Evaluation Committee members begin their review of the Build Phase proposals.
 |
| 3 weeks before the NOPA | * Project teams will give 45-minute presentations on their concept to the judges and/or Evaluation Committee members.
 |
| NOPA Release | * Recommended winners for the Build Phase announced.
 |
| Six to eight weeks or more after NOPA release | * Preparation of amendments to grant agreement documents for Build Phase.
* Publication of Business Meeting Agenda.
 |
| **Timeline** | **Activity** |
| CEC Business Meeting | * Commission Business Meeting to consider and possibly, approve, amendments to grant agreements for Build Phase award winners.
 |
| [~~Showcase Event~~] | * [~~A two-minute video developed by all Design Phase project teams will be shown at the Showcase Event.~~
* ~~Project teams will have booths with 3-D models of their project, along with other communication tools of their choosing to discuss with forum attendees (could be virtual).~~
* ~~Winners for nonmonetary awards announced.~~]
 |

Source: California Energy Commission staff

1. **Page 16, Section I.D.1**

Amended to read:

The maximum funding amounts for the Build Phase will differ based on [~~the number of bedrooms in the development and~~] whether projects are located in a designated low-income[[1]](#footnote-2) (LI) or disadvantaged community[[2]](#footnote-3) (DAC), see Table 9.

|  |  |  |
| --- | --- | --- |
| [**~~Number of Bedrooms in the Development~~**] | **Maximum Project Award Build Phase (non-DAC or LI)** | **Maximum Project Award Build Phase (DAC or LI)** |
| [~~50 – 74~~] | [~~$5 million~~] | [~~$6 million~~] |
| [~~75 – 99~~] | [~~$6 million~~] | [~~$7 million~~] |
| [~~100 – 124~~] | [~~$7 million~~] | [~~$8 million~~] |
| [~~125+~~] | $8 million | $9 million |

1. **Page 17-19, Section I.E. Table 10: Key Activities Schedule**

Amended to read:

|  |  |  |
| --- | --- | --- |
| **ACTIVITY** | **DATE** | **TIME[[3]](#footnote-4)**  |
| **Solicitation Release** | December 15, 2020 |  |
| **Pre-Application Workshop** | January 21, 2021 |  |
| **ACTIVITY** | **DATE** | **TIME**  |
| **Deadline for Written Questions**[[4]](#footnote-5) | **January 22, 2021** | **5:00 p.m.** |
| **Empower Innovation Event****https://www.empowerinnovation.net/en/page/empower-innovation-event-en** | **January 28, 2021** | **8:30 a.m**  |
| Anticipated Distribution of Questions and Answers | Week of March 29,2021 |  |
| **Deadline to Submit Concept Application Abstracts** | May 7, 2021 | **5:00 p.m.** |
| Anticipated Posting of Concept Application Abstract Results | Week of June 7, 2021 |  |
| **Deadline to Submit Full Applications for the Design Phase[[5]](#footnote-6)** | **December 1,** 2021 | **[~~5:00~~] 11:59 p.m.[[6]](#footnote-7)** |
| Notice of Proposed Award Posting Date  | Week of January 17, 2022  |  |
| Anticipated CEC Business Meeting | April 2022 |  |
| **ACTIVITY** | **DATE** | **TIME**  |
| Anticipated Agreement Start Date – Design Phase Begins | April 2022 |  |
| **Deadline to Submit Application Materials for the Build Phase**  | **September 22, 2023** | **5:00p.m.** |
| Notice of Proposed Award (Build Phase) | December 4, 2023 |  |
| Anticipated CEC Business Meeting (Build Phase Amendment) | February, 2024 |  |
| [~~Design Showcase Event (maybe be virtual or in-person)~~] | [~~December, 2023~~] |  |
| Build Phase Begins  | March, 2024 |  |
| Anticipated Design Phase Agreement End Date[[7]](#footnote-8) | March 2024 |  |
| Anticipated Build Phase Agreement End Date  | March 2027 |  |

1. **Page 45, Section III.**

Amended to read:

**16. Energy and Emissions Performance Workbook – (Attachment 16)**

**Projects are expected to complete and submit a report detailing the results of software modeling of the development’s expected energy and emissions performance and impacts on tenants' energy bills. This workbook *must also be completed* as part of the Build Phase application and is intended to capture a high-level summary of the expected developments performance.**

**17. Zero-Emission Cost Benefit Analysis Report Guidelines – (Attachment 17)**

**This document provides guidelines for the required analysis of the estimated cost difference between the zero-emission build-out compared to standard building design, construction, and operations. This document is for guidance only and should not be submitted with the Build Phase application.**

1. **Page 63, Section IV.H Build Phase Selection, Table 19: Build Phase Selection Evaluation Rubric - Construction**

Amended to read:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Area II: Construction  | Excellent  | Above Average  | Average  | Below Average  | Far Below Average  | Missing  |
| 1. Advanced Construction Practices  • Planning, design and construction methods  • Potential for construction time and cost savings  | 10 | 8 | 6 | 4 | 2 | 0 |
| 2. Construction Readiness  • Regulatory approvals • Secured financing • Completion of engineering and design analysis • Clarity of construction plan **• Project Team Readiness** | 10 | 8 | 6 | 4 | 2 | 0 |
| Subtotal: \_\_\_\_\_\_  |  |  |  |  |  |  |

1. **Page 71-72**, **Page 63, Section IV.H Build Phase Selection, Table 24: Detailed Build Phase Selection Evaluation Criteria**

Amended to read:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ENHANCING FEATURES: RESILIENCY, SAFETY, AESTHET-ICS AND FUNCTION-ALITY   | Design incorporates all the following: Development is resistant to power outages and can maintain critical life-support conditions in the event of extended loss of power. Design accounts for major environmental hazards that are historically common in the region or expected to result from climate change. Advanced energy features are not disruptive to commercial and residential tenants. Advanced energy features are well integrated into the form and function of the development. Advanced energy features are aesthetically pleasing.  | Design incorporates three of the following: Development is resistant to power outages and can maintain critical life-support conditions in the event of extended loss of power. Design accounts for major environmental hazards that are historically common in the region or expected to result from climate change. Advanced energy features are not disruptive to commercial and residential tenants. Advanced energy features are well integrated into the form and function of the development. Advanced energy features are aesthetically pleasing.  | **Design incorporates two of the following: Development is resistant to power outages and can maintain critical life-support conditions in the event of extended loss of power. Design accounts for major environmental**hazards that are historically common in the region or expected to result from climate change. Advanced energy features are not disruptive to commercial and residential tenants. Advanced energy features are well integrated into the form and function of the development. Advanced energy features are aesthetically pleasing.  | Design incorporates one of the following: Development is resistant to power outages and can maintain critical life-support conditions in the event of extended loss of power. Design accounts for major environmental hazards that are historically common in the region or expected to result from climate change. Advanced energy features are not disruptive to commercial and residential tenants. Advanced energy features are well integrated into the form and function of the development. Advanced energy features are aesthetically pleasing.  | Design incorporates none of the following: Development is resistant to power outages and can maintain critical life-support conditions in the event of extended loss of power. Design accounts for major environmental hazards that are historically common in the region or expected to result from climate change. Advanced energy features are not disruptive to commercial and residential tenants. Advanced energy features are well integrated into the form and function of the development. Advanced energy features are aesthetically pleasing.  |
| ADVANCED CONSTRUC-TION PRACTICES:  | [~~Project utilizes multiple advanced planning, design and construction methods (e.g. building information modeling, modular construction, offsite manufacturing, prefabrication).~~]Project demonstrates exceptional potential for significant construction time and cost savings by leveraging advanced planning, design and construction methods **(e.g. building information modeling, modular construction, offsite manufacturing, prefabrication)** compared to a similar buildout using standard construction practices.  | [~~Project utilizes some advanced planning, design and construction methods (e.g. building information modeling, modular construction, offsite manufacturing, prefabrication).~~]Project demonstrates potential for construction time and cost savings by leveraging advanced planning, design and construction methods **(e.g. building information modeling, modular construction, offsite manufacturing, prefabrication)** compared to a similar buildout using standard construction practices.  | Project demonstrates some potential for construction time and cost savings by leveraging advanced planning, design and construction methods **(e.g. building information modeling, modular construction, offsite manufacturing, prefabrication)** compared to a similar buildout using standard construction practices.  | Project demonstrates minimal potential for construction time and cost savings by leveraging advanced planning, design and construction methods **(e.g. building information modeling, modular construction, offsite manufacturing, prefabrication** compared to a similar buildout using standard construction practices.  | Planning, design and construction methods are likely to be significantly more costly and time intensive.  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| CONSTRUC-TION READINESS:  | Design incorporates all the following: The project has secured all necessary regulatory approvals needed to begin construction (e.g. completed Environmental Impact Reviews, CEQA determinations). The project has demonstrated very clear and secured source(s) of financing the construction of the development. The project has completed and finalized all necessary engineering and design analysis. The project has identified all remaining tasks needed before construction can begin and presents a very clear and reasonable plan for accomplishing those tasks. **The project team has been fully identified and includes commitment letters from all key project partners and team members. The project has identified how various tasks will be managed and coordinated.** | Design differs from ‘Excellent’ criteria in at least one of the following ways: The project has secured most of the necessary regulatory approvals needed to begin construction (e.g. completed Environmental Impact Reviews, CEQA determinations). The project has demonstrated clear and secured source(s) of financing the construction of the development. The project has completed and finalized most of the necessary engineering and design analysis. The project has identified most of the remaining tasks needed before construction can begin and presents a clear and reasonable plan for accomplishing those tasks. **The project team has mostly been identified and includes commitment letters from most key project partners and team members. The project has mostly identified how various tasks will be managed and coordinated.** | Design differs from ‘Excellent’ criteria in at least one of the following ways: The project has secured some of the necessary regulatory approvals needed to begin construction (e.g. completed Environmental Impact Reviews, CEQA determinations). The project has demonstrated secured source(s) of financing the construction of the development. The project has completed and finalized some of the necessary engineering and design analysis. The project has identified some of the remaining tasks needed before construction can begin and presents a somewhat clear and reasonable plan for accomplishing those tasks. **The project team has been somewhat identified and includes commitment letters from some key project partners and team members. The project has somewhat identified how various tasks will be managed and coordinated.** | Design differs from ‘Excellent’ criteria in at least one of the following ways: The project has secured very little of the necessary regulatory approvals needed to begin construction (e.g. completed Environmental Impact Reviews, CEQA determinations). The project has demonstrated some source(s) of financing the construction of the development. The project has completed and finalized very little of the necessary engineering and design analysis. The project has identified very few of the remaining tasks needed before construction can begin or presents an unclear or unreasonable reasonable plan for accomplishing those tasks. **Much of the project team has yet to be identified, few to no commitment letters from key project partners and team members. The plan for how various tasks will be managed and coordinated is unclear.** | Design differs from ‘Excellent’ criteria in at least one of the following ways: The project has not secured any necessary regulatory approvals needed to begin construction (e.g. completed Environmental Impact Reviews, CEQA determinations). The project has not demonstrated any source(s) of financing the construction of the development. The project has not completed or finalized any necessary engineering and design analysis. The project has not identified any remaining tasks needed before construction can begin or does not present a plan for accomplishing those tasks. **The project team has not be identified and no commitment letters are provided.The project has not identified how various tasks will be managed and coordinated.** |

**Project Narrative Attachment**

1. Amended to read:

See the formatting recommendations in Part III, Section A.

The Project Narrative must respond to each sub-criterion below.

**Emerging Energy Technologies**

***[Separate Emerging Technologies and Strategies Report not required but acceptable]***

1. What emerging energy technologies [~~will~~] **did** the project team [~~pursue for the~~] **include in their** zero-emission mixed-use development **design and how does their performance exceed that of standard technology** [~~concept~~]? How [~~will~~] **does** the project demonstrate innovative all-electric applications in the nonresidential portion of the developments? ·
2. What technologies [~~will be~~] **were** used to enable dynamic energy management for load flexibility? **What are the plans for engaging residents in load flexibility** ~~How will residents engage in demand response that integrates real-time pricing~~?
3. **What percentage of EV charging stations can respond to grid and/or building signals?  Describe the technology and management method that enable grid-interactive or building-interactive EV charging.  Are the remaining parking spaces without EV charging stations designed to be EV-ready?**
4. What steps [~~will~~] **did** the project team take to ensure the performance, safety, and reliability of the technologies prior to the installation in the build stage of the competition? **To what extent have the emerging technologies chosen been demonstrated?**

**Energy, Emission and Cost Performance**

***[Provide a summary of building energy and emissions performance here and more details in the Energy & Emissions Performance Report.***

1. **How is your building exceeding energy and emission reductions beyond what is required by the 2022 Building Energy Efficiency Standards (Title 24, Part 6)?**
2. **What is the design’s strategy to meet daily peak electricity demand using onsite renewables, onsite storage, and load management?**
3. **What innovative, grid-interactive building elements does your design include?**
4. **How will the advanced energy elements impact tenants’ energy bills compared to a similar development built to code?**
5. **How will the design be capable of responding to price signals, especially real-time pricing that will be implemented in the future**?

1. [~~What tools and methods will be used to model the expected energy performance of the mixed-use development, including:~~
* ~~Onsite renewable generation~~
* ~~Building loads~~
* ~~Grid-interactive metrics (shed, shift, etc.) and grid services or Bill savings for tenants~~
1. ~~What tools and methods will be used to model the expected emissions performance of the mixed-use development? ·~~
2. ~~What tools and methods will be used to model the overall construction and operating costs of the proposed design at scale? This should take into consideration expected cost reductions from scale – both per-unit technology costs as well as soft cost reductions that result from the “on-the-ground” learning. This will be used to compare the project to a minimally code-compliant version using standard design and construction practices at the end of the design phase~~.]

**Cost Performance**

***[Provide a summary of the cost performance here and more details in the Zero Emissions Cost-Benefit Analysis Report]***

1. **What are the overall construction and operating costs of the proposed design?  How do these costs compare to a minimally code-compliant design?**

**Resiliency and Safety**

1. What planning tools [~~will~~] **did** the team use [~~or has used~~] to take into consideration climate change impacts at the proposed project site?
2. What enhancing technology and design features [~~will~~] **did** the project team pursue for the mixed-use development to be resilient to power outages, natural disasters, or other environmental hazards or impacts expected from climate change?
3. **Describe microgrid design goals and operation strategies and how they compare with the minimum design requirements. Describe microgrid operation during temporary and extended grid outages. Describe interoperability with DER aggregation platforms, such as Virtual Power Plant.**

**Aesthetics and Functionality**

1. How [~~is~~] **did** the project team [~~planning to~~] take advantage of novel features and form factors in some of the emerging energy technologies to improve the aesthetics and functionality of the building?
2. What passive design features will be employed to improve the sustainability and aesthetics of the development?
3. What smart home features will the development come pre-equipped with? How will this enable the residents to be prosumers?

**Advanced Construction Practices**

1. What advanced planning, design, and construction methods [~~will~~] **did** the project team pursue for this project?
2. What is the potential for construction time and cost savings of these advanced methods compared to a similar buildout using standard construction practices?
3. What strategies and materials [~~will~~] **did** the project team pursue to reduce the embedded emissions from building construction and materials?

**Construction Readiness**

1. How does the development construction timeline align with the timeline of this funding opportunity?
2. **What critical milestones (e.g. permitting, CEQA, financing) were completed during the design phase and what critical milestones remain before the project can begin construction? When is construction expected to begin?** [~~What are the critical milestones in the design phase the project team will manage to ensure the project is ready to move into the build phase?~~]
3. What is the project team’s plan for financing the development? What additional incentives, such as utility incentives and tax incentives, will the project team pursue to help finance the development.
4. Team Readiness questions

**Community and Economic Impact**

1. **How did the project team solicit community input and incorporate community feedback into the project design, including the purpose of the nonresidential space? What steps and actions did the applicant take to ensure the project aligns with the needs and vision of the community?**
2. How [~~does~~] **did** the project team [~~plan to~~] address or minimize gentrification in a way that is aligned with local government and community priorities? How [~~does~~] **did** the project team address affordability that reflects community needs?
3. **What positive impacts will the development have on the local community?**
4. **What type of workforce development or local job creation is expected to result from the project?**
5. **How will this project improve access to electric mobility, solar PV, and demand response for the tenants?**
6. **What technology platforms or innovative policy/financial mechanisms will be used to enable this?**
7. [~~What steps and actions will the applicant take to ensure the project aligns with the needs and vision of the community? How does the project team plan to solicit community input and incorporate community feedback into the project design, including the purpose of the nonresidential space? · What positive impacts will the development have on the local community? What type of capacity building, workforce development, or local job creation is expected to result from the project? · How will this project improve access to electric mobility, solar PV, and demand response for the tenants? What technology platforms or innovative policy/financial mechanism will be used to enable this?~~]

**Market Transformation**

1. How [~~does~~] **will** the project team [~~plan to~~] promote the broader adoption of the emerging energy technologies and advanced architectural, design, and construction practices demonstrated by this project?
2. How will this project help transition mixed-use development from a one-off bespoke model to a more standardized, repeatable, and scalable model? ·
3. What financing strategies and sources [~~will~~] **did** the project team pursue for the ownership and operation of the advanced energy elements of the development [~~in a way that is affordable and replicable for other developments without access to grant funding~~]? **Explain how this method will be affordable and replicable for other developments without access to grant funding.**
4. What standards and protocols will be used to create a more plug-and-play environment for energy technology solutions?
5. What contingency plans [~~will~~] **did** team pursue to reduce risk of adopting new technologies?

[**~~Customer (Tenant) Interface~~**

1. ~~How will this project communicate and market climate resiliency features to future tenants? ·~~
2. ~~What interfaces are planned to engage and reward tenants for maintaining the energy efficiency, demand flexibility and climate resiliency features of the building(s)~~]

**Team Qualifications, Capabilities and Resources**

1. Identify 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), including Community Based Organization,* appropriate qualifications, experience, financial stability and capability to complete the project.
2. Explain the team structure and how various tasks will be managed and coordinated.

*Include an organization chart similar to the one below*



**Figure X: Organization Chart**

1. Describe the facilities, infrastructure, and resources available that directly support the project.
2. Describe the team’s history of successfully completing projects in the past 10 years including subsequent deployments and commercialization.

**Budget and Cost Effectiveness**

1. Budget forms are complete for the applicant and all subcontractors, as instructed in Budget Attachment.

*Provide a budget by tasks, such as:*

**Table X: Task Budget**

|  |  |  |  |
| --- | --- | --- | --- |
| **Task (by major task)**  | **Energy Commission Funds**  | **Match Share**  | **Total**  |
| Task 1: General Project Tasks  |   |   |   |
| Task 2:  |   |   |   |
| Task [TBD-1]: Evaluation of Project Benefits  |   |   |   |
| Task [TBD-2]: Technology/ Knowledge Transfer Activities \*  |   |   |   |
| [~~Task [TBD-3]: Phase II Application Package~~]  |   |   |   |

\* **Requires 5% of total CEC funds**

1. Justifies the reasonableness of the requested funds relative to the project goals, objectives, and tasks.
2. Justifies the reasonableness of direct costs (e.g., labor, fringe benefits, equipment, materials & misc. travel, and subcontractors).
3. Justifies the reasonableness of indirect costs (e.g., overhead, facility charges (e.g., rent, utilities), burdens, subcontractor profit, and other like costs).

[**~~Funds Spent in California~~**

~~This project proposes to spend $\_\_\_\_\_\_\_\_\_ of Energy Commission funds in California.~~ ]

**~~Disadvantaged/Low-Income Communities~~**

~~In order to receive or qualify for these additional points, the proposed project must demonstrate benefits to the disadvantaged and/or low-income communities, by describing the following:~~

1. ~~Proposal identifies how the target market(s) will benefit disadvantaged and/or low-income communities.~~
2. ~~Identifies economic impact on low-income and disadvantaged communities including customer bill savings, job creation, partnering and contracting with micro- and small-businesses, and economic development.~~
3. ~~Describes how the project will increase access to clean energy or sustainability technologies within disadvantaged and/or low-income communities and how the development will benefit the communities.~~
4. ~~Applicants have letters of support from technology partners, community-based organizations, environmental justice organizations, or other partners that demonstrate their belief that the proposed project will lead to increased equity, and is both feasible, and commercially viable in the identified low-income and/or disadvantaged communities.~~]

**Phil Dyer**

**Commission Agreement Officer**

1. “Low-income communities” means communities within census tracts with median household incomes at or below either of the following levels:

(A) Eighty percent of the statewide median income.

(B) The applicable low-income threshold listed in the state income limits updated by the Department of Housing and Community Development and filed with the Office of Administrative Law pursuant to subdivision (c) of Section 50093 of the Health and Safety Code. [↑](#footnote-ref-2)
2. “Disadvantaged communities” means communities identified pursuant to Section 39711 of the Health and Safety Code. https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-30. [↑](#footnote-ref-3)
3. Pacific Standard Time or Pacific Daylight Time, whichever is being observed. [↑](#footnote-ref-4)
4. This deadline does not apply to non-technical questions (e.g., questions concerning application format requirements or attachment instructions) or to questions that address an ambiguity, conflict, discrepancy, omission, or other error in the solicitation. Such questions may be submitted to the Commission Agreement Officer listed in Section G at any time prior to the application deadline. Please see Section G for additional information. [↑](#footnote-ref-5)
5. All applicants who passed the Concept Application stage are eligible to submit a full application for the Design Phase, even if they did not previously submit an application by the earlier deadline. Applicants who have already submitted applications and do not want to change anything in the application do not need to resubmit. Applicants who already submitted applications and do want to change something in their application will need to notify the CAO (see section I.G for contact information) to retract their previously submitted application, and will have to fully re-submit their revised application. [↑](#footnote-ref-6)
6. Applicants must upload and submit applications BEFORE 11:59 p.m. The Grants Solicitation System will automatically close promptly at 11:59 pm. If the application has not been fully received before 11:59 pm, your application will not be considered. NO EXCEPTIONS will be entertained. Do not wait until right before 11:59 pm to submit your application. Due to factors outside the CEC’s control and unrelated to the GSS system, application upload times may be much longer than expected; some past applicants have experienced unexpected technology issues causing long delays that prevented timely submittal. Please plan accordingly. [↑](#footnote-ref-7)
7. Design Phase agreement schedules should be developed based on an anticipated Design Phase Agreement End Date of March 2024. Recipients who are selected for the Build Phase will revise their schedule to reflect the Build Phase Agreement End Date of October 2025. [↑](#footnote-ref-8)