***Instructions appear in blue. Carefully read the instructions before completing each section. Delete the instructions after completing each section.***

This document identifies all activities that must be conducted to complete the project, lists all tasks/subtasks and products identified in the Scope of Work (Attachment 2), and identifies the timeframe for completion.

Use the description of tasks and products proposed in section 6.d “Technical Approach” of the Application Form (Attachment 1) to complete this document. The work efforts should also align with the Budget Worksheet (Attachment 4).

If your project includes more than one (1) of the five (5) eligible project activities, make sure to group any items by project activity.

In the table, present a series of logical, discrete, and sequential tasks, which may be divided into subtasks to better frame the project work. Please include both project-related activities and grant-reporting activities. Add additional tasks and table rows as needed.

***Additional instructions for each table column are provided below.***

1. **Activities:** Insert the task numbers and activity names for the project.
2. **Task List (Subtasks, if helpful)**: List each task identified in a separate row. Organize tasks under each project activity in the order they will occur. Use this section to describe the essential elements of the process you will use to complete each project activity. You can enter subtasks into this column or add an additional column for subtasks to organize the details, if helpful.
3. **Timetable (in months):** Provide the anticipated start and end months for each task/subtask identified. All work should be fully complete by 06/30/2027.
4. **Products:** Provide a description of each product. Some tasks/subtasks may not have an associated deliverable. In this case, indicate “N/A.” The CAM or designated project contact may request copies of products as needed to assess project progress.
5. **General Project Tasks:** Reporting (status updates), meetings, invoices/reconciliation reports, executing/managing subaward agreements, and the Final Report. Please include in your project plan the following general activities:
   1. **Meetings:** Details about the required kick-off, Critical Project Review, and final meetings are provided in the Scope of Work (Attachment 2).
   2. **Invoices and Reconciliation Reports**: Invoicing or reconciliation of advanced funding is required at a minimum quarterly. The CAM may request additional reconciliation reports during the term of the agreement. Following full reconciliation of all advance funds, invoices can be submitted no more frequently than quarterly. The California Energy Commission (CEC) will provide the advance payment invoice template, reconciliation report template, and standard invoice template.
   3. **Quarterly Progress Reports:** These assist the CEC withcomplying with federal reporting requirements, as well as verifying satisfactory and continued progress toward achieving the objectives of this agreement on time and within budget. Additional details are provided in the Scope of Work (Attachment 2). The CEC will provide the progress report template following the kick-off meeting.
   4. **Execute and Manage Subaward Agreements:** Details about these requirements are provided in the Scope of Work (Attachment 2).
   5. **Final Report**: A Final Report is required. The CEC will provide the Final Report template upon request. Please plan to submit a draft Final Report to the CAM or designated project contact at least two (2) months prior to the agreement end date to allow sufficient time for comments or revisions, if needed. The Final Report must be submitted at least one (1) month prior to the agreement end date, or within sixty (60) days of the depletion of funds.

***Sample content is provided below in blue italicized font. Remove the sample content when completing the table.***

**Name of Applicant/Subrecipient:**

**Project Title:**

| Activities | Tasks/Subtasks | Timetable  in months | Subrecipient Product(s) |
| --- | --- | --- | --- |
| **Task 1 – General Project Tasks** | Subtask 1.1:  Kick-Off Meeting | Start: 09/2024  Complete: 09/2024 | * Updated Schedule of Products and Due Dates (if applicable) |
|  | Subtask 1.2: Invoices and Reconciliation Reports | Start: 01/2025  Complete: 06/2027 | * First advance payment invoice (if applicable) * Second advance payment invoice (if applicable) * Quarterly reconciliation reports * Quarterly standard invoices * Proof of payment for incurred costs   (if applicable)   * Final retention invoice |
|  | Subtask 1.3: Quarterly Progress Reports | Start: 01/2025  Complete: 06/2027 | * Quarterly progress reports |
|  | Subtask 1.4:  Critical Project Review Meetings | TBD: Scheduled by CAM (if necessary) | * CPR Report(s) |
|  | Subtask 1.5:  Execute and Manage Subaward Agreements | Start: 09/2024  Complete: 06/2027 | * List of all sub-subrecipient, vendors, and activities requiring subaward agreements * Copies of draft subaward agreements for review (if applicable) * Copies of final executed subaward agreements * Copies of applicable documents for any additional sub-subrecipients identified as necessary |
|  | Subtask 1.6:  Final Meeting | TBD: Scheduled by CAM (prior to the term end date of this agreement) | * Written documentation of meeting agreements and unresolved activities * Schedule for completing closeout activities |
| ***Task 2 – Technical Tasks, Activity 1 –***  ***Developing a Community Building Decarbonization Plan*** | *Subtask 2.A.1: Research Potential Plan Components* | *Start: 10/2024*  *Complete: 01/2025* | * *Draft plan components (submit with Quarterly Report)* |
|  | *Subtask 2.A.2:*  *Seek Input from the Public and Officials* | *Start: 01/2025*  *Complete: 03/2025* | * *Summary of input from the public and officials (submit with Quarterly Report)* |
|  | *Subtask 2.A.3:*  *Draft Initial Report of Recommendations* | *Start: 03/2025*  *Complete: 05/2025* | * *Draft Initial Report of Recommendations (submit with Quarterly Report)* |
|  | *Subtask 2.A.4:*  *Publish and Receive Input on Draft* | *Start: 05/2025*  *Complete: 09/2025* | * *Summary of input on draft (submit with Quarterly Report)* |
|  | *Subtask 2.A.5:*  *Prepare Draft Plan* | *Start: 09/2025*  *Complete: 12/2025* | * *Draft Community Building Decarbonization Plan* |
|  | *Subtask 2.A.6:*  *Seek Jurisdiction and Public Input* | *Start: 01/2026*  *Complete: 03/2026* | * *Documentation of stakeholder engagement activities* |
|  | *Subtask 2.A.7:*  *Publish Final Plan* | *Start: 04/2026*  *Complete: 05/2026* | * *Community Building Decarbonization Plan (final)* |
| ***Task 2 – Technical Tasks, Activity 2 –***  ***Developing a Municipal Building Decarbonization Plan*** | *Subtask 2.B.1: Research Potential Plan Components* | *Start: 10/2024*  *Complete: 01/2025* | * *Draft plan components (submit with Quarterly Report)* |
| *(insert additional rows as needed)* |  |  |  |
| **Task 3 – Final Reporting** | Subtask 3.1.1:  Final Report Outline | Start: 01/2027  Complete: 02/2027 | * Draft outline of the Final Report * Final outline of the Final Report |
|  | Subtask 3.1.2:  Final Report | Start: 03/2027  Complete: 05/2027 | * Draft Final Report * Final Report |