



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
March 13, 2024 Business Meeting
Backup Materials for Eagle Rock Analytics, Inc.**

The following backup materials for the above-referenced agenda item are available in this PDF packet as listed below:

1. Proposed Resolution
2. Grant Request Form
3. Scope of Work

[PROPOSED]

RESOLUTION NO: 24-0313-13

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: Eagle Rock Analytics, Inc.

RESOLVED, that the State Energy Resources Conservation and Development Commission (CEC) adopts the staff CEQA findings contained in the Agreement or Amendment Request Form (as applicable); and

RESOLVED, that the CEC approves agreement EPC-23-024 (GFO-19-311) with Eagle Rock Analytics, Inc. for a \$3,500,000 grant to build on prior Electric Program Investment Charge (EPIC) achievements to cost-effectively advance the co-production of new analytical features, user capacity, and guidance of the Cal-Adapt: Analytics Engine. The goal of this project is to overcome inter-disciplinary knowledge and capacity gaps between climate science, information technology, and electricity sector practitioners. This will allow for Investor-Owned Utilities (IOUs), electricity sector stakeholders, government decision makers, and researchers to utilize actionable, curated climate data tailored for resilience planning; and

FURTHER BE IT RESOLVED, that the Executive Director or their designee shall execute the same on behalf of the CEC.

CERTIFICATION

The undersigned Secretariat to the CEC 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 CEC held on March 13, 2024.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Kristine Banaag
Secretariat



GRANT REQUEST FORM (GRF)

A. New Agreement Number

IMPORTANT: New Agreement # to be completed by Contracts, Grants, and Loans Office.

New Agreement Number: EPC-23-024

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Emily Field
3. MS-:None
4. Phone Number: Enter Phone Number

C. Recipient's Information

1. Recipient's Legal Name: Eagle Rock Analytics, Inc.
2. Federal ID Number: 88-4422477

D. Title of Project

Title of project: Cal-Adapt: Analytics Engine - Scaling up to Enhance Digital Platform, Accelerate Production of Data Products, & Expand User Base

E. Term and Amount

1. Start Date: 5/1/2024
2. End Date: 3/31/2028
3. Amount: \$3,500,000

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 3/13/2024
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Susan Wilhelm
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge).

Agenda Item Subject and Description:

Eagle Rock Analytics, Inc.

Proposed resolution approving agreement EPC-23-024 (GFO-19-311) with Eagle Rock Analytics, Inc. for a \$3,500,000 grant to build on prior Electric Program Investment Charge (EPIC) achievements to cost-effectively advance the co-production of new analytical features, user capacity, and guidance of the Cal-Adapt: Analytics Engine, and adapting staff's determination that this action is exempt from CEQA. The goal of this project is to overcome inter-disciplinary knowledge and capacity gaps between climate science, information technology, and electricity sector practitioners. This will allow for Investor-Owned Utilities (IOUs), electricity sector stakeholders, government decision makers, and researchers to utilize actionable, curated climate data tailored for resilience planning. (EPIC funding) Contact: Susan Wilhelm

G. California Environmental Quality Act (CEQA) Compliance

1. Is Agreement considered a "Project" under CEQA?

Yes



If yes, skip to question 2.

If no, complete the following (PRC 21065 and 14 CCR 15378) and explain why Agreement is not considered a "Project":

Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because:

2. If Agreement is considered a "Project" under CEQA answer the following questions.

a) Agreement **IS** exempt?

Yes

Statutory Exemption?

No

If yes, list PRC and/or CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

PRC section number: None

CCR section number: None

Categorical Exemption?

Yes

If yes, list CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

CCR section number: Cal. Code Regs., tit. 14, § 15306 ;

Common Sense Exemption? 14 CCR 15061 (b) (3)

Yes

If yes, explain reason why Agreement is exempt under the above section. If no, enter "Not applicable" and go to the next section.

Cal. Code Regs., tit. 14, sec. 15061(b)(3) the "common sense exemption", provides that CEQA applies only to projects which have the potential for causing a significant effect on the environment. Where it can be seen with certainty that there is no possibility that the activity in question may have a significant effect on the environment, the activity is not subject to CEQA. Cal. Code Regs., tit. 14, sec. 15306 the "information collection exemption" provides that projects which consist of basic data collection, research and resource evaluation activities which do not result in a serious or major disturbance to an environmental resource are categorically exempt from the provisions of CEQA.

This Agreement is exempt under both the common sense and information collection exemptions because project activities are limited to the development of a data platform that provides access to climate projection data and analytics associated with specific use-cases that support electricity sector adaptation and resilience planning. The project will not involve any construction or installation activities or any other activities that may result in a significant effect on the environment.

Further, the project will not result in any cumulative impact to the environment that is significant, does not involve any unusual circumstances, will not result in damage to



any scenic resources within a highway officially designated as a state scenic highway, none of the installation sites are included on any list compiled pursuant to Government Code section 65962.5, and the project will not cause a substantial adverse change in the significance of a historical resource. Therefore, none of the exceptions to exemptions listed in CEQA Guidelines section 15300.2 apply to this project.

b) Agreement **IS NOT** exempt.

IMPORTANT: consult with the legal office to determine next steps.

No

If yes, answer yes or no to all that applies. If no, list all as “no” and “None” as “yes”.

Additional Documents	Applies
Initial Study	No
Negative Declaration	No
Mitigated Negative Declaration	No
Environmental Impact Report	No
Statement of Overriding Considerations	No
None	Yes

H. Subcontractors

List all Subcontractors listed in the Budget (s) (major and minor). Insert additional rows if needed. If no subcontractors to report, enter “No subcontractors to report” and “0” to funds.

Delete any unused rows from the table.

Subcontractor Legal Company Name	CEC Funds	Match Funds
DOE- Lawrence Berkeley National Laboratory	\$ 374,105	\$0
TBD - Consultant	\$ 131,733	\$0
Sowing Change Strategies LLC	\$ 47,970	\$0

I. Vendors and Sellers for Equipment and Materials/Miscellaneous

List all Vendors and Sellers listed in Budget(s) for Equipment and Materials/Miscellaneous. Insert additional rows if needed. If no vendors or sellers to report, enter “No vendors or sellers to report” and “0” to funds. **Delete** any unused rows from the table.

Vendor/Seller Legal Company Name	CEC Funds	Match Funds
To Be Determined	\$73,800	\$0

J. Key Partners

List all key partner(s). Insert additional rows if needed. If no key partners to report, enter “No key partners to report.” **Delete** any unused rows from the table.



Key Partner Legal Company Name

No key partners to report

K. Budget Information

Include all budget information. Insert additional rows if needed. If no budget information to report, enter "N/A" for "Not Applicable" and "0" to Amount. **Delete** any unused rows from the table.

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
EPIC	22-23	301.001J	\$ 3,500,000

TOTAL Amount: \$ 3,500,000

R&D Program Area: EGRB: EA

Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: Not applicable

L. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Owen Doherty

Address: 3669 57th St

City, State, Zip: Sacramento, CA 95820-2352

Phone: 631-766-7406

E-Mail: owen@eaglerockanalytics.com

2. Recipient's Project Manager

Name: Owen Doherty

Address: 3669 57th St

City, State, Zip: Sacramento, CA 95820-2352

Phone: 631-766-7406

E-Mail: owen@eaglerockanalytics.com

M. Selection Process Used

There are three types of selection process. List the one used for this GRF.

Selection Process	Additional Information
Competitive Solicitation #	Not applicable
First Come First Served Solicitation #	Not applicable



Other	<p>Follow-on funding pursuant to Public Resources Code section 25711.5(h)(4)(a):</p> <ul style="list-style-type: none">(i) The project is eligible to receive an award of funds from the EPIC program.(ii) The project has been funded, at least in part, through the EPIC program.(iii) The project has a prime recipient that is located in California.(iv) The project will spend a minimum of 80 percent of its funding from the program in California.(v) The project has received funding for the original project or technology through a competitive bid process from a state or federal agency.(vi) The project has demonstrated significant results under its previous award.(vii) The project has technology breakthrough potential that can enable the state to achieve its statutory energy policy goals on or ahead of schedule.(viii) The project can address near-term priorities impacting the electricity sector and its ratepayers, such as mitigating wildfires and reducing the occurrence of deenergization events.(ix) Absent follow-on funding, the project would experience a gap in funding that would likely prevent the technology from achieving significant advancement, negatively impact the ability of the project to attract sufficient private investment, or prevent the project's commercialization and associated sales revenue.(x) The project has not previously received follow-on funding through a noncompetitive method. <p>Additionally, this project is set for vote at a business meeting, and does not exceed the project's most recent competitively bid award through the EPIC program.</p>
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N. Attached Items

1. List all items that should be attached to this GRF by entering "Yes" or "No".

Item Number	Item Name	Attached
1	Exhibit A, Scope of Work/Schedule	Yes
2	Exhibit B, Budget Detail	Yes
3	CEC 105, Questionnaire for Identifying Conflicts	Yes
4	Recipient Resolution	No
5	Awardee CEQA Documentation	No

Approved By

Individuals who approve this form must enter their full name and approval date in the MS Word version.

Agreement Manager: Emily Field

Approval Date: 1/25/2024

Branch Manager: Alex Horangic

Approval Date: 1/26/2024

Director: Delegated to Branch Manager

Approval Date: 1/26/2024

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR¹	Task Name
1		General Project Tasks
2		Co-Production of Cal-Adapt: Analytics Engine
3	x	Agile Project Management and Team Coordination
4		Development of the Cal-Adapt: Analytics Engine
5		Evaluation of Project Benefits
6		Technology/Knowledge Transfer Activities

B. Acronym/Term List

Acronym/Term	Meaning
AWS	Amazon Web Services
Analytics Engine	Cal-Adapt: Analytics Engine
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CAVA	Climate Adaptation and Vulnerability Assessment
CEC	California Energy Commission
CPR	Critical Project Review
CPUC	California Public Utilities Commission
EAD	Energy Assessments Division
EPIC	Electric Program Investment Charge
GRC	General Rate Case
IEPR	Integrated Energy Policy Report
IOU	Investor-Owned Utility
JASC	Joint Action Steering Committee
Platform	Cal-Adapt: Analytics Engine
RAMP	Risk Assessment and Mitigation Phase
TAC	Technical Advisory Committee

¹ 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.

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

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

A. Purpose of Agreement

The purpose of this Agreement is to build on prior Electric Program Investment Charge (EPIC) achievements to cost-effectively advance the co-production of new guidance, user capacity, and functions of the Cal-Adapt: Analytics Engine with the goal of overcoming inter-disciplinary knowledge and capacity gaps between climate science, information technology, and electricity sector practitioners. This will allow for Investor-Owned Utility (IOU)s, electricity sector stakeholders, government decision makers, and researchers to utilize actionable, curated climate data tailored for resilience planning.

B. Problem/ Solution Statement

Problem

Meeting the state's ambitious climate goals and timelines requires actionable, reliable climate information, data, and analytics to be usable by energy sector decision makers and stakeholders. Three critical barriers exist: (1) an urgent, time-sensitive need to overcome the inter-disciplinary knowledge gap between climate and energy to advance energy applications, (2) simplifying access to massive quantities of climate data and (3) meeting the need for analytics and climate data available ahead of urgent, time-sensitive key regulatory actions.

Solution

The Cal-Adapt: Analytics Engine (hereafter referred to as "platform") offers an innovative breakthrough of the three major barriers above to timely implementation of state priorities. Through co-production this research will overcome the barriers between scientific innovation and practical implementation. In co-production, end users (i.e. stakeholders), programmers, and scientists work together to identify and prioritize new feature development. This research team includes developers, programmers, social scientists, climate scientists, and data scientists, all providing key skills and knowledge necessary to serve as "boundary spanners" to collectively communicate across science and energy fields.

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

- Improve the Analytics Engine in a manner that is scientifically rigorous, reflects best practices, and enhances usability and the overall user experience for electricity stakeholders.
- Build on ongoing relationships and trust with stakeholders and data producers to co-produce new guidance, user capacity and platform features to overcome the inter-

Exhibit A Scope of Work Eagle Rock Analytics, Inc.

disciplinary knowledge and capacity gaps between climate science, information technology, and electricity sector practitioners.

- Sustain and deepen relationships with key stakeholders (e.g., state agency and IOU staff involved with planning, research, and climate adaptation) to support collaboratively identifying, defining, and delivering novel climate informatics products.

Ratepayer Benefits:² This Agreement will result in the ratepayer benefit of a more reliable and safer electricity grid. The Analytics Engine is a mature, applied research project which has already delivered clear ratepayer benefits, such as providing cutting edge data analytics and scientific expertise to technical staff responsible for planning for a future grid, thus supporting efforts to increase the safety of the electric system. This project will further these benefits.

Technological Advancement and Breakthroughs:³ This Agreement will lead to technological advancement and breakthroughs to overcome barriers to the achievement of the State of California's statutory energy goals by further developing the Cal-Adapt: Analytics Engine to bridge the gap between compelling visuals and scientifically informed, actionable information by providing granular data, scientific guidance and digital innovation that allows for meaningful progress in energy system application of climate data.

Agreement Objectives

The objectives of this Agreement are to:

- Develop scientific, analytical, and guidance resources to support specific applications of climate and weather data to support energy sector resilience, planning, and research in California.
- Convene working groups, one-on-one meetings, workshops and/or conferences as needed to facilitate conversations and advance sector capacity through co-production.
- Accelerate the delivery of data products to key energy sector stakeholders such as state agencies and IOUs by leveraging existing foundational, core programmatic development and scientific capacities developed with the original funding stream.
- Expand the power and accessibility of the data platform in a manner that aligns with open data, transparency, and best-science practices in support of California's energy transition.

² California Public Resources Code, Section 25711.5(a) requires projects funded by the Electric Program Investment Charge (EPIC) to result in ratepayer benefits. The California Public Utilities Commission, which established the EPIC in 2011, defines ratepayer benefits as greater reliability, lower costs, and increased safety (See CPUC "Phase 2" Decision 12-05-037 at page 19, May 24, 2012, http://docs.cpuc.ca.gov/PublishedDocs/WORD_PDF/FINAL_DECISION/167664.PDF).

³ California Public Resources Code, Section 25711.5(a) also requires EPIC-funded projects to lead to technological advancement and breakthroughs to overcome barriers that prevent the achievement of the state's statutory and energy goals.

Exhibit A
Scope of Work
Eagle Rock Analytics, 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)**. All products submitted which will be viewed by the public, must comply with the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973, as amended (29 U.S.C. Sec. 794d), and regulations implementing that act as set forth in Part 1194 of Title 36 of the Federal Code of Regulations. All technical tasks should include product(s). 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, including the Final Report Outline and Final Report

- 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.
- Consider incorporating all CAM comments into the final product. If the Recipient disagrees with any comment, provide a written response explaining why the comment was not incorporated into the final product.
- Submit the revised product and responses to comments within 10 days of notice by the CAM, unless the CAM specifies a longer time period, or approves a request for additional time.

For products that require a final version only

- Submit the product to the CAM for acceptance. The CAM may request minor revisions or explanations prior to acceptance.

For all products

- Submit all data and documents required as products in accordance with the following:

Instructions for Submitting Electronic Files and Developing Software:

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

○ **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 California Energy Commission's (CEC) 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.

The following describes the accepted formats for electronic data and documents provided to the CEC 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.
- Project management documents will be in Microsoft Project file format, version 2007 or later.

○ **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 CEC'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.

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

The Recipient shall:

- Attend a “Kick-off” meeting with the CAM, and other CEC staff relevant to the Agreement. The Recipient’s Project Manager and any other individuals deemed necessary by the CAM or the Project Manager shall participate in 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 meeting participants. The meeting may take place in person or by electronic conferencing (e.g., Teams, Zoom), with approval of the CAM.

The Kick-off meeting will include discussion of the following:

- The CAM’s expectations for accomplishing tasks described in the Scope of Work;
 - An updated Project Schedule;
 - Terms and conditions of the Agreement;
 - Invoicing and auditing procedures;
 - Travel;
 - Equipment purchases;
 - Administrative and Technical products (subtask 1.1);
 - CPR meetings (subtask 1.3);
 - Monthly Calls (subtask 1.5)
 - Quarterly Progress reports (subtask 1.6)
 - Final Report (subtask 1.7)
 - Match funds (subtask 1.8);
 - Permit documentation (subtask 1.9);
 - Subawards(subtask 1.10);
 - Technical Advisory Committee meetings (subtasks 1.11 and 1.12);
 - Agreement changes;
 - Performance Evaluations; and
 - Any other relevant topics.
- Provide *Kick-off Meeting Presentation* to include but not limited to:
 - Project overview (i.e. project description, goals and objectives, technical tasks, expected benefits, etc.)
 - Project schedule that identifies milestones
 - List of potential risk factors and hurdles, and mitigation strategy
 - Provide an *Updated Project Schedule, Match Funds Status Letter, and Permit Status Letter*, 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*.

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

Recipient Products:

- Kick-off Meeting Presentation
- Updated Project Schedule (*if applicable*)
- Match Funds Status Letter (subtask 1.7) (*if applicable*)
- Permit Status Letter (subtask 1.8) (*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 CEC 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 CEC 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 Commission Agreement Officer (CAO) and any other individuals selected by the CAM to provide support to the CEC.

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 may 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 CEC, 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 and submit 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.
- 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* with a list of expected CPR participants in advance of the CPR meeting. If applicable, the agenda may include a discussion of match funding and permits.

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

- 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. A determination of unsatisfactory progress This may result in project delays, including a potential Stop Work Order, while the CEC determines whether the project should continue.
- 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)

CAM Products:

- CPR Agenda(s)
- Progress Determination

Subtask 1.4 Final Meeting

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

The Recipient shall:

- Meet with CEC 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 of the following Agreement closeout items:
 - Disposition of any procured equipment.
 - The CEC'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.

Exhibit A
Scope of Work
Eagle Rock Analytics, Inc.

- 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 copies of *All Final Products* organized by the tasks in the Agreement.

Products:

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

MONTHLY CALLS, REPORTS AND INVOICES

Subtask 1.5 Monthly Calls

The goal of this task is to have calls at least monthly between the CAM and Recipient to verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement on time and within budget.

The objectives of this task are to verbally summarize activities performed during the reporting period, to identify activities planned for the next reporting period, to identify issues that may affect performance and expenditures, to verify match funds are being proportionally spent concurrently or in advance of CEC funds or are being spent in accordance with an approved Match Funding Spending Plan, to form the basis for determining whether invoices are consistent with work performed, and to answer any other questions from the CAM. Monthly calls might not be held on those months when a quarterly progress report is submitted or the CAM determines that a monthly call is unnecessary.

The CAM shall:

- Schedule monthly calls.
- Provide questions to the Recipient prior to the monthly call.
- Provide call summary notes to Recipient of items discussed during call.

The Recipient shall:

- Review the questions provided by CAM prior to the monthly call.
- Provide verbal answers to the CAM during the call.

Product:

- Email to CAM concurring with call summary notes.

Subtask 1.6 Quarterly 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.

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Scope of Work
Eagle Rock Analytics, Inc.

The Recipient shall:

- Submit a *Quarterly Progress Report* to the CAM. Each progress report must:
 - Summarize progress made on all Agreement activities as specified in the scope of work for the reporting period, including accomplishments, problems, milestones, products, schedule, fiscal status, and an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Progress reports are due to the CAM the 10th day of each January, April, July, and October. The Quarterly Progress Report template can be found on the ECAMS Resources webpage available at: <https://www.energy.ca.gov/media/4691>
- Submit a monthly or quarterly *Invoice* on the *Invoice Template(s)* provided by the CAM.

Recipient Products:

- Quarterly Progress Reports
- Invoice

CAM Product:

- Invoice Template(s)

Subtask 1.7 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. When creating the Final Report Outline and the Final Report, the Recipient must use the CEC Style Manual provided by the CAM.

Subtask 1.7.1 Final Report Outline

The Recipient shall:

- Prepare a *Final Report Outline* in accordance with the *Energy Commission Style Manual* provided by the CAM.

Recipient Products:

- Final Report Outline (draft and final)

CAM Products:

- Energy Commission Style Manual
- Comments on Draft Final Report Outline
- Acceptance of Final Report Outline

Subtask 1.7.2 Final Report

The Recipient shall:

- Prepare a *Final Report* for this Agreement in accordance with the approved Final

Exhibit A

Scope of Work

Eagle Rock Analytics, Inc.

Report Outline, Energy Commission Style Manual, and Final Report Template provided by the CAM with the following considerations:

- Ensure that the report includes the following items, in the following order:
 - Cover page (**required**)
 - Credits page on the reverse side of cover with legal disclaimer (**required**)
 - Acknowledgements page (optional)
 - Preface (**required**)
 - Abstract, keywords, and citation page (**required**)
 - Table of Contents (**required**, followed by List of Figures and List of Tables, if needed)
 - Executive summary (**required**)
 - Body of the report (**required**)
 - References (if applicable)
 - Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
 - Bibliography (if applicable)
 - Appendices (if applicable) (Create a separate volume if very large.)
 - Attachments (if applicable)
- Submit a draft of the Executive Summary to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments on Draft Final Report* received on the Executive Summary. For each comment received, the Recipient will identify in the summary the following:
 - Comments the Recipient proposes to incorporate.
 - Comments the Recipient does propose to incorporate and an explanation for why.
- Submit a draft of the report to the CAM for review and comment. The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt.
- Incorporate all CAM comments into the *Final Report*. If the Recipient disagrees with any comment, provide a *Written Responses to Comments* explaining why the comments were not incorporated into the final product.
- Submit the revised *Final Report* electronically with any Written Responses to Comments within 10 days of receipt of CAM's Written Comments on the Draft Final Report, unless the CAM specifies a longer time period or approves a request for additional time.

Products:

- Summary of TAC Comments on Draft Final Report
- Draft Final Report
- Written Responses to Comments (*if applicable*)
- Final Report

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CAM Product:

- Written Comments on the Draft Final Report

MATCH FUNDS, PERMITS, AND SUBAWARDS

Subtask 1.8 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. 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 application that led to the CEC 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 application that led to the CEC 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.
 - If different from the solicitation application, provide 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.
- 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.

Exhibit A
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Products:

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

Subtask 1.9 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*)

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- Copy of Each Approved Permit (*if applicable*)

Subtask 1.10 Subawards

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

The Recipient shall:

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

Products:

- Subawards (*if requested by the CAM*)

TECHNICAL ADVISORY COMMITTEE

Subtask 1.11 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.

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- Help set the project team's goals and contribute to the development and evaluation of its statement of proposed objectives as the project evolves.
- Provide a credible and objective sounding board on the wide range of technical and financial barriers and opportunities.
- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate, to the extent the TAC members feel is appropriate, on behalf of the project in its effort to build partnerships, governmental support, and relationships with a national spectrum of influential leaders.
- Ask probing questions that insure a long-term perspective on decision-making and progress toward the project's strategic goals.

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;
- 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 1.12.
- 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

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Subtask 1.12 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.

The TAC shall:

- Help set the project team's goals and contribute to the development and evaluation of its statement of proposed objectives as the project evolves.
- Provide a credible and objective sounding board on the wide range of technical and financial barriers and opportunities.
- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate on behalf of the project in its effort to build partnerships, governmental support and relationships with a national spectrum of influential leaders.
- Ask probing questions that insure a long-term perspective on decision-making and progress toward the project's strategic goals.
- Review and provide comments to proposed project performance metrics.
- Review and provide comments to proposed project Draft Technology Transfer Plan.

Products:

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

Subtask 1.13 Project Performance Metrics

The goal of this subtask is to finalize key performance targets for the project based on feedback from the TAC and report on final results in achieving those targets. The performance targets should be a combination of scientific, engineering, techno-

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economic, and/or programmatic metrics that provide the most significant indicator of the research or technology's potential success.

The Recipient shall:

- Complete and submit the project performance metrics section of the *Initial Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task, to the CAM.
- Present the draft project performance metrics at the first TAC meeting to solicit input and comments from the TAC members.
- Develop and submit a *TAC Performance Metrics Summary* that summarizes comments received from the TAC members on the proposed project performance metrics. The *TAC Performance Metrics Summary* will identify:
 - TAC comments the Recipient proposes to incorporate into the *Initial Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task.
 - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Develop and submit a *Project Performance Metrics Results* document describing the extent to which the Recipient met each of the performance metrics in the *Final Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task.
- Discuss the *Project Performance Metrics Results* at the Final Meeting.

Products:

- TAC Performance Metrics Summary
- Project Performance Metrics Results

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IV. TECHNICAL TASKS

TASK 2 CO-PRODUCTION OF CAL-ADAPT: ANALYTICS ENGINE

The goal of this Task is to build on ongoing relationships and trust with stakeholders and data producers to co-produce new guidance, user capacity and Cal-Adapt: Analytics Engine (hereafter referred to as “platform”) features to overcome the inter-disciplinary knowledge and capacity gaps between climate science, information technology, and electricity sector practitioners.

The Recipient Shall:

- Convene working groups, one-on-one meetings, workshops and/or conferences as needed to facilitate conversations and advance sector capacity through co-production.
- Convene specific engagements with technical staff at state agencies to provide additional support for:
 - 2024 Integrated Energy Policy Report (IEPR) update
 - 2025 IEPR
 - Energy Assessments Division (EAD) for planning efforts such as: demand scenarios, supply-side analyses and stochastic & scenario-driven approaches
- Develop user guidance and best practices for statistical and scientific applications.
- Identify and characterize use cases and potential applications of climate data in the electricity sector.
- Contribute to the development of work plans and technical requirement documents for implementation of new and improved platform features.
- Provide CAM with “*Dynamic Timeline of Key Milestones for Stakeholder Collaboration*” to be updated biannually or at request of CAM.
- Provide CAM with situational awareness of climate data and climate data analysis needs of electricity sector through *Synthesis of Co-Production* which will consist of a combination of the following technical products: technical summaries, anonymized interviews, anonymized meeting transcripts, engagement agendas and notes, and/or peer reviewed manuscripts.

Products:

- Dynamic Timeline of Key Milestones for Stakeholder Collaboration (biannually, beginning June 30, 2024)
- Synthesis of Co-Production (draft and final)

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TASK 3 AGILE PROJECT MANAGEMENT AND TEAM COORDINATION

The goal of this Task is to ensure the project and development of the platform is responsive to CAM and stakeholders needs, balancing flexibility and rigor. Project management and coordination efforts should identify and remove hurdles to programmatic success.

The Recipient Shall:

- Develop the platform through iterations that incrementally provide value to users of the platform thereby reducing risk of wasted efforts or ineffective features.
- Prioritize development tasks in coordination with CAM, stakeholders, and project team.
- Visualize the prioritized tasks and backlog of feature improvements through a *Development Trello Board*, which is a living document that is continually updated with new stakeholder requests and development of novel features. Snapshots of the Development Trello Board will be made available (as a .pdf) upon CAM request or no less frequently than annually.
- Establish collaboration channels (e.g. Slack) to facilitate and focus inter-team questions and communication within and between the various teams involved with platform development (e.g., engagement, analytics, outreach, training).

Products:

- Development Trello Board

TASK 4 DEVELOPMENT OF THE CAL-ADAPT: ANALYTICS ENGINE

The goal of this Task is to improve the platform in a manner that is scientifically rigorous, reflects best (technical and scientific) practices, and improves usability and the overall user experience for electricity stakeholders.

The Recipient Shall:

- Maintain and improve upon the *Cal-Adapt Data Catalog*, which provides programmatic access and metadata support for climate projections developed within EPC-20-006 and stored on the cloud through EPC-20-007.
- Develop relationships with cloud providers (e.g. AWS) to identify and acquire new capacity and resources for supporting the platform.
- Co-produce new functionality, visualizations, and analytical functionality as well as creation of step-by-step, clickable workflows that link climate data and analysis techniques to specific use cases or applications within the electricity sector. Development will enable stakeholders to address key climate related issues in electricity sector applications such as:

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- California Public Utilities Commission (CPUC) production cost modeling
- CEC's California energy demand forecast
- IOU assessments and analyses (e.g. Risk Assessment and Mitigation Phase (RAMP), Climate Adaptation and Vulnerability Assessment (CAVA), General Rate Case (GRC))
- Building efficiency and decarbonation
- Reliability planning (via EAD and Joint Action Steering Committee (JASC))
- Technology investments in reliability and resilience
- CPUC adaptation rulemaking implementations
- Support open data, transparency and best-science practices in support of California's energy transition by:
 - Making all new technical capacity open and free through the *Climakitae Code Repository* an online, interactive archive of useable python code
 - Making all new workflows open and free through the *Cal-Adapt: Analytics Engine Notebooks Repository*
- Provide additional, specific technical support for:
 - 2024 IEPR update
 - 2025 IEPR
 - EAD for planning efforts such as: demand scenarios, supply-side analyses and stochastic & scenario-driven approaches
 - Vulnerability and assessment planning activities of IOUs
- Provide ongoing maintenance of and enhancement to the platform over the course of the agreement.
- Democratize access to data and applications by developing new access options for platform, such as:
 - Enabling users to provide their own AWS account to use platform.
 - Develop the platform to launch in a free cloud compute environment through third party services such as AWS Sage Maker Studio Lab or Saturn Cloud.

Products:

- Cal-Adapt Data Catalog (draft and final)
- Climakitae Code Repository (draft and final)
- Cal-Adapt: Analytics Engine Notebooks Repository (draft and final)

TASK 5 EVALUATION OF PROJECT BENEFITS

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

The Recipient shall:

- Complete *the Initial Project Benefits Questionnaire*. The Initial Project Benefits Questionnaire shall be initially completed by the Recipient with 'Kick-off' selected

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for the 'Relevant data collection period' and submitted to the CAM for review and approval.

- Complete the *Annual Survey* by January 31st of each year. The Annual Survey includes but is not limited to the following information:
 - Technology commercialization progress
 - New media and publications
 - Company growth
 - Follow-on funding and awards received
- Complete the *Final Project Benefits Questionnaire*. The Final Project Benefits Questionnaire shall be completed by the Recipient with 'Final' selected for the 'Relevant data collection period' and submitted to the CAM for review and approval.
- Respond to CAM questions regarding the questionnaire drafts.
- Complete and update the project profile on the CEC's public online project and recipient directory on the [Energize Innovation website \(www.energizeinnovation.fund\)](http://www.energizeinnovation.fund), and provide *Documentation of Project Profile on EnergizeInnovation.fund*, including the profile link.
- If the Prime Recipient is an Innovation Partner on the project, complete and update the organizational profile on the CEC's public online project and recipient directory on the [Energize Innovation website \(www.energizeinnovation.fund\)](http://www.energizeinnovation.fund), and provide *Documentation of Organization Profile on EnergizeInnovation.fund*, including the profile link.

Products:

- Initial Project Benefits Questionnaire
- Annual Survey(s)
- Final Project Benefits Questionnaire
- Documentation of Project Profile on EnergizeInnovation.fund
- Documentation of Organization Profile on EnergizeInnovation.fund

TASK 6 KNOWLEDGE TRANSFER ACTIVITIES

The goal of this task is to ensure the scientific and techno-economic analysis and tools developed under this agreement are utilized in the energy policy, and/or planning decisions at the state and/or local levels, academic community and/or commercial sector.

The Recipient Shall:

- Develop and submit a *Knowledge Transfer Plan* that identifies the proposed activities the recipient will conduct to meet the goal of the task. The *Knowledge Transfer Plan* should include at a minimum:
 - Specific policy and planning efforts this project is expected to inform.

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- Specific stakeholder groups and energy policy and planning practitioners who will utilize the results of this project.
- Proposed activities the Recipient will conduct to ensure the tools and results from this project will be utilized and adopted by the groups identified above.
- Present the *Draft Knowledge Transfer Plan* to the TAC for feedback and comments.
- Develop and submit a *Summary of TAC Comments* that summarizes comments received from the TAC members on the *Draft Knowledge Transfer Plan*. This document will identify:
 - TAC comments the Recipient proposes to incorporate into the *Final Knowledge Transfer Plan*.
 - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Submit the *Final Knowledge Transfer Plan* to the CAM for approval.
- Implement the activities as described in the *Final Knowledge Transfer Plan*.
- Develop a *Knowledge Transfer Summary Report* that includes high level summaries of the activities, results, and lessons learned of tasks performed relating to implementing the Final Technology Transfer Plan. This report should not include any proprietary information.
- When directed by the CAM, develop presentation materials for an CEC-sponsored conference/workshop(s) on the project.
- When directed by the CAM, participate in annual EPIC symposium(s) sponsored by the California CEC.
- Provide at least (6) six High Quality Digital Photographs (minimum resolution of 1300x500 pixels in landscape ratio) of pre and post technology installation at the project sites or related project photographs.

Products:

- Knowledge Transfer Plan (draft and final)
- Summary of TAC Comments
- Knowledge Transfer Summary Report (draft and final)
- High Quality Digital Photographs

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.