



**CALIFORNIA  
ENERGY COMMISSION**



**California Energy Commission  
November 13, 2024 Business Meeting  
Backup Materials for GopowerEV, 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: 24-1113-05d**

**STATE OF CALIFORNIA**

**STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION**

**RESOLUTION: GopowerEV, 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-24-026 with GoPowerEV, Inc. for a \$2,448,792 grant. The agreement will develop and demonstrate an EV charging automated load management system that adjusts charging load considering real-time distribution transformer monitoring data. The system will enable increased adoption of EV chargers at multi-unit dwellings in Ontario, Redwood City, and South San Francisco with limited available infrastructure capacity that would otherwise require costly and time intensive upgrades; 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 November 13, 2024.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

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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-24-026

### B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Katelynn Dinius
3. MS-:51
4. Phone Number: 916-776-3468

### C. Recipient's Information

1. Recipient's Legal Name: GoPowerEV, Inc.
2. Federal ID Number: 84-3603666

### D. Title of Project

Title of project: Transformer-Level Automated Load Management for EV Charging in Multi Unit Dwellings

### E. Term and Amount

1. Start Date: 12/2/2024
2. End Date: 12/31/2027
3. Amount: \$2,448,792.00

### F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 11/13/2024
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Katelynn Dinius
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge).

#### **Agenda Item Subject and Description:**

**GOPOWEREV, INC.** Proposed resolution approving agreement EPC-24-026 with GoPowerEV, Inc. for a \$2,448,792 grant, and adopting staff's recommendation that this action is exempt from CEQA. The grant project will develop and demonstrate an electric vehicle (EV) charging automated load management system that adjusts charging load considering real-time distribution transformer monitoring data. The system will enable increased adoption of EV chargers at multi-unit dwellings with limited available infrastructure capacity that would otherwise require costly and time intensive upgrades. (EPIC funding) Contact: Katelynn Dinius

### 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, § 15301 ; Cal. Code Regs., tit. 14, § 15306 ;

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

No

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, section 15301 provides that projects that consist of the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, involving negligible or no expansion of existing or former use, are categorically exempt from the provisions of CEQA. The locations affected by the proposed project are at existing facilities, which have already been graded, disturbed, paved, and have structures constructed. The project will require limited alteration activities such as installation of electric vehicle supply equipment on existing electrical panels at multi-unit dwellings and installation of distribution transformer monitors on existing utility distribution transformers. The project activities involve negligible or no expansion of existing or former use and will not have a significant effect on the environment and thus fits within section 15301.

Cal. Code Regs., tit 14, section 15306 provides that projects that consist of basic data collection, research, experimental management, 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. The project will dynamically manage electric vehicle charging loads at multi-unit dwellings and monitor distribution



grid equipment to prevent overloading. The project will not introduce any harmful contaminants or produce any local emissions as a result of demonstration activities. Nor would the project create any impacts to air and water quality, or the natural and human environments. The project activities will not have a significant effect on the environment and fits within section 15306.

The project will not impact an environmental resource of hazardous or critical concern where designated, precisely mapped, and officially adopted pursuant to law by federal, state, or local agencies; does not involve any cumulative impacts of successive projects of the same type in the same place that might be considered significant; does not involve unusual circumstances that might have a significant effect on the environment; will not result in damage to scenic resources within a highway officially designated as a state scenic highway; the project site is not 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 categorical exemptions listed in CEQA Guidelines section 15300.2 apply to this project, and this project will not have a significant effect on the environment.

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. Is this project considered “Infrastructure”?**

No



## I. 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
Acterra: Action for a Healthy Planet	\$ 55,000	\$0
Breathe Southern California	\$ 55,000	\$0

## J. 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
TBD – Nationally Recognized Testing Laboratory	\$100,000	\$0
TBD - Electrician	\$200,000	\$0
Enmasse Industrial Design LLC	\$25,000	\$0
TBD - Technical Writer	\$20,000	\$0
TBD - Engineering Firm	\$0	\$20,000
TBD - Design & Permitting	\$0	\$4,000
TBD - Signage Distributor	\$1,920	\$0
TBD - Utility Interconnect	\$0	\$20,000
TBD - Electronics Distributor	\$60,000	\$16,000
Kosse Partners I, LLC	\$5,600	\$0
Seacomp Displays Inc.	\$45,600	\$0
TBD- EVSE Install	\$0	\$220,000
TBD - Monitoring Equipment	\$24,000	\$0

## K. 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



**L. 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	23-24	301.001K	\$ 2,448,792

**TOTAL Amount:** \$ 2,448,792

R&D Program Area: ESTB: Transportation  
Explanation for “Other” selection Not applicable  
Reimbursement Contract #: Not applicable  
Federal Agreement #: 101

**M. Recipient’s Contact Information**

**1. Recipient’s Administrator/Officer**

Name: Harrison Waschura  
Address: 2935 Alexis Dr  
City, State, Zip: Palo Alto, CA 94304-1302  
Phone: 650-704-6234?  
E-Mail: harrison.waschura@gopowerev.com

**3. Recipient’s Project Manager**

Name: Harrison Waschura  
Address: 2935 Alexis Dr  
City, State, Zip: Palo Alto, CA 94304-1302  
Phone: 650-704-6234?  
E-Mail: harrison.waschura@gopowerev.com

**N. Selection Process Used**

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

Selection Process	Additional Information
Competitive Solicitation #	GFO-23-306
First Come First Served Solicitation #	Not applicable
Other	Not applicable



**O. 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	Yes

**Approved By**

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

**Agreement Manager:** Katelynn Dinius

**Approval Date:** 10/2/2024

**Branch Manager:** Reynaldo Gonzalez

**Approval Date:** 10/4/2024

**Director:** Reynaldo Gonzalez for Jonah Steinbuck

**Approval Date:** 10/4/2024



**EXHIBIT A**  
**Scope of Work**  
**GoPowerEV, Inc.**

**I. TASK ACRONYM/TERM LISTS**

**A. Task List**

Task #	CPR <sup>1</sup>	Task Name
1		General Project Tasks
2	X	ALM Safety Certification
3	X	Technology Pilot
4		Community Engagement & Outreach
5		Evaluation of Project Benefits
6		Technology/Knowledge Transfer Activities

**B. Acronym/Term List**

Acronym/Term	Meaning
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
EV	Electric Vehicle
TAC	Technical Advisory Committee
ALM	Automated Load Management
DTM	Distribution Transformer Monitor
MUD	Multi-Unit Dwelling
UL	Underwriter's Laboratory
NRTL	Nationally Recognized Testing Laboratory
AHJ	Authority Having Jurisdiction

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

**A. Purpose of Agreement**

The purpose of this Agreement is to fund the development and demonstration of an electric vehicle (EV) charging automated load management (ALM) system that adjusts charging load considering real-time distribution transformer monitoring data. The system will enable increased adoption of EV chargers at multi-unit dwellings (MUD) with limited available infrastructure capacity that would otherwise require expensive and time intensive upgrades.

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

# **EXHIBIT A**

## **Scope of Work**

### **GoPowerEV, Inc.**

#### **B. Problem/ Solution Statement**

##### **Problem**

Achieving equitable EV adoption will require access to at-home charging at MUD sites, but many sites are facing electrical capacity limitations. MUD EV charger installations have very few options when deciding how to deal with limited infrastructure capacity. These options include (1) reducing the size of the EV charger installation to whatever capacity is available; (2) installing EV charging equipment but limiting its peak draw with a static ALM limit; or (3) installing EV charging equipment after waiting for a distribution upgrade. These options often don't meet the changing needs of the site, and upgrades to distribution infrastructure equipment (for example, transformers, feeders, and switchgears) are expensive and time intensive.

##### **Solution**

The Recipient has developed a novel ALM and distribution monitoring solution that monitors the load on a specific distribution transformer, or switchgear, and dynamically adjusts the net load from EV charging to ensure infrastructure equipment is not at risk of overloading. This automated solution enables utilities and municipalities to permit the installation of additional EV charging ports at MUD sites, without the need to immediately upgrade the transformer or switchgear. The solution also accounts for local distributed generation from solar panels, stationary battery storage, or vehicle-to-grid discharging, and optimizes the power flow based on the limitations of the existing infrastructure.

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

##### **Agreement Goals**

The goals of this Agreement are to:

- Validate the technical and commercial viability of the ALM and distribution monitoring system for EV charging in MUDs.
- Demonstrate the application and regulatory acceptance of the ALM and distribution monitoring system by utilities and municipalities.
- Quantify and communicate the reduction of installation and energization timelines and costs that can be achieved using an ALM and distribution monitoring system for EV charger installations.
- Engage community stakeholders throughout the project to ensure the project is benefiting the community, including through the increased availability of EV charging ports at MUDs at a lower cost.

**Ratepayer Benefits:**<sup>2</sup> This Agreement will result in the ratepayer benefits of lower costs, quick energization, greater electricity reliability, and increased safety by reducing the risk of EV charging loads overloading existing electrical infrastructure.

Preventing or delaying transformer upgrades directly benefits ratepayers, who would otherwise collectively bear the cost burden of those upgrades. The ALM and distribution monitoring

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<sup>2</sup> 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](http://docs.cpuc.ca.gov/PublishedDocs/WORD_PDF/FINAL_DECISION/167664.PDF)).

## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

technology will target MUDs larger than 4 units in both retrofit and new building markets. The Recipient has experienced a potential need for ALM and distribution monitoring technology in over 50% of their existing customer sites. The Recipient has developed a 3-year growth plan based on analysis of regional market entry and buildout capacity. Under this model, they expect to expand the penetration of upgrade-deferring technology to over 200,000 parking spaces over 3 years. Assuming 56% of those sites would otherwise require a transformer upgrade, this represents a savings on infrastructure upgrades of over \$250M.

It's estimated that this technology will reduce energization timelines by 8-16 months. This is based on the observed delays experienced in previous installations. The reduction in timelines and costs will result in more EV charger installations in MUDs in California IOU territory, which enables EV ownership by CA IOU customers. Reduction in energization timelines will be available immediately to any project using this technology.

Directly monitoring a distribution transformer's instantaneous load allows the ALM to charge the maximum number of EVs simultaneously as the transformer can safely handle within its operating limits. These operating limits as well as the resident's individual charging needs are used to optimize the overall site EV charging profile. Preventing transformer overload directly improves overall electricity reliability and safety.

Technological Advancement and Breakthroughs:<sup>3</sup> This Agreement aims to drive technological advancements and breakthroughs that will help California meet its energy goals by developing the first transformer-monitoring EV ALM system for commercial deployment. Currently, available ALM systems do not incorporate direct distribution transformer monitoring, so they cannot dynamically adjust EV charging load based on the dynamic available capacity of the transformer, which limits the overall EV charging that can occur at a given site. Integrating a distribution transformer monitor into an ALM system is a technological advancement that will support the California state energy goals under (1) Senate Bill 676<sup>4</sup> by commercializing a feasible and cost-effective solution that can maximize vehicle grid integration benefits and (2) Senate Bill 410<sup>5</sup> by commercializing a technology that can help utilities reduce the energization timeline for EV charging in MUDs.

#### **Agreement Objectives**

The objectives of this Agreement are to:

- Achieve safety certification of the ALM and distribution monitoring system to applicable UL standard(s).
- Install, operate, and demonstrate the ALM and distribution monitoring system for EV charging at a target of 4 MUD demonstration sites.
- Validate the potential benefits of the ALM and distribution monitoring system for reducing distribution grid upgrade costs and increasing EV charger availability at MUD sites.

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<sup>3</sup> 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.

<sup>4</sup> Senate Bill (SB) 676 (Bradford) (Statutes of 2019), [https://leginfo.ca.gov/faces/billNavClient.xhtml?bill\\_id=201920200SB676](https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201920200SB676); see also CPUC web page, entitled "VGI Policy, Pilots, and Technology Enablement" available at <https://www.cpuc.ca.gov/vgi/>

<sup>5</sup> Senate Bill (SB) 410 (Becker) (Statutes of 2023), [https://leginfo.ca.gov/faces/billTextClient.xhtml?bill\\_id=202320240SB410](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=202320240SB410)

## EXHIBIT A Scope of Work GoPowerEV, Inc.

- Inform scalable and consistent criteria for adoption of ALM and distribution monitoring technology, including future infrastructure planning, utility programs or incentive requirements, and emerging standards.
- Engage industry and community stakeholders to share results of this project to promote adoption of the ALM and distribution monitoring system for MUD sites and sites with similar capacity constraints.

### 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:

- **Electronic File Format**

## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

- 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.

#### **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.

## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

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*.

#### **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

## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

progress on technical transfer and production readiness activities (if applicable). Participants will include the CAM and the Recipient and may include the CAO and any other individuals selected by the CAM to provide support to the 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.
- 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

## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

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.
- 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



## **EXHIBIT A**

### **Scope of Work**

#### **GoPowerEV, Inc.**

- 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.

#### **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
- Invoices

#### **CAM Product:**

- Invoice template

#### **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

# EXHIBIT A

## Scope of Work

### GoPowerEV, Inc.

#### Subtask 1.7.2 Final Report

##### The Recipient shall:

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

##### CAM Product:

- Written Comments on the Draft Final Report

## EXHIBIT A

### Scope of Work

#### GoPowerEV, Inc.

#### **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.

##### **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.

## EXHIBIT A

### Scope of Work

#### GoPowerEV, Inc.

Permits must be identified and obtained before the Recipient may incur any costs related to the use of the permit(s) for which the Recipient will request reimbursement.

**The Recipient shall:**

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

The list of permits and the schedule for obtaining them will be discussed at the Kick-off meeting (subtask 1.2), and a timetable for submitting the updated list, schedule, and copies of the permits will be developed. The impact on the project if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in progress reports and will be a topic at CPR meetings.

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

**Products:**

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

**Subtask 1.10 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*)

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#### **GoPowerEV, Inc.**

#### **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.
- 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

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#### **GoPowerEV, Inc.**

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

#### **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)

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- 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-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

### **IV. TECHNICAL TASKS**

#### **TASK 2 ALM SAFETY CERTIFICATION**

The goal of this task is to achieve safety certification of the transformer-monitoring automated load management system by a Nationally Recognized Testing Laboratory (NRTL), which is necessary for commercial adoption.

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

- Prepare *Safety Certification Plan* that includes, but is not limited to:
  - Identified safety standards the ALM and distribution monitoring system will be certified against.
  - Description of those safety standards.
  - Proposed schedule for testing.
  - General testing procedures.
- Manage the certification process, including certification proposal, engineering calls, software documentation, test support, test report review, and system modification.

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- Respond to NRTL feedback, and collaborate with NRTL staff through test, analysis, and reporting iterations to ensure safety certification is completed.
- Prepare *Safety Certification Report* that includes, but is not limited to, the following:
  - Summary of NRTL feedback.
  - Testing results.
  - Analysis of testing results.
  - Certification status.
- Prepare a *CPR Report #1* in accordance with subtask 1.3.
- Participate in a CPR meeting.

#### **Products:**

- Safety Certification Plan (draft and final)
- Safety Certification Report
- CPR Report #1

### **TASK 3 TECHNOLOGY PILOT**

The goal of this task is to demonstrate the commercial readiness and benefit of the ALM and distribution monitoring system for EV charging installations in MUDs. The system will be demonstrated at a target of 4 MUD sites, with 20 - 120 EVSE under control.

#### **SUBTASK 3.1 PILOT DESIGN AND PLANNING**

The goal of this subtask is to design, plan, and prepare for the EV charger and ALM and distribution monitoring system installation.

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

- Prepare *Design Documentation Package* for the EV charger and ALM and distribution monitoring system installation at a target of 4 MUD sites. The package will include, but is not limited to:
  - Project Plan Set
  - Electrical Drawings
  - Permit Application
- Negotiate pricing and prepare procurement for installation equipment and services.
- Engage with relevant Authority Having Jurisdiction (AHJs), building departments and utilities to plan and agree to their work.
- Finalize project implementation timelines for specific demonstration sites.

#### **Products:**

- Design Documentation Package

#### **SUBTASK 3.2 PILOT INSTALLATION**

The goal of this subtask is to install the physical hardware required for demonstrating the ALM and distribution monitoring technology benefits at the demonstration sites.

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

- Coordinate schedules and resources between the selected EVITP-certified electricians for each demonstration site.
- Manage on-site installation work by EVITP-certified electricians at the demonstration site(s).
- Manage utility interconnection and DTM installation process at the demonstration site(s).



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- Coordinate site access with site host(s).
- Coordinate any necessary power shutdowns with site host(s).
- Organize and oversee the necessary AHJ inspection(s).
- Develop a *Final Inspection Report* that provides a high-level overview of installation activities, challenges encountered, solutions implemented, and lessons learned.
- Develop a *Measurement & Verification Plan* detailing planned pilot activities and data collection process that includes, but is not limited to:
  - Data collection framework and methodology for the target 4 demonstration sites related to energization time, avoided/deferred grid and customer electrical upgrades and associated costs, maximum number of chargers that can be energized at the site, automated load management based on distribution monitoring data, and grid impact.
  - Plan to gather stakeholder feedback on the ALM and distribution monitoring technology (property managers, utility partners, site residents, community members).

#### **Products:**

- Final Inspection Report
- Measurement & Verification Plan (draft and final)

### **SUBTASK 3.3 PILOT OPERATION AND DATA COLLECTION**

The goal of this subtask is to operate the EV charger and ALM and distribution monitoring system for the duration of the pilot, engage stakeholders for feedback, and collect performance data.

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

- Commission the EV charger and ALM and distribution monitoring system with relevant cloud software services
- Operate cloud computing software services necessary for EV charger operation.
- Perform software updates as necessary.
- Monitor system operation for any abnormalities.
- Maintain the system to prevent or correct any issues or abnormalities.
- Engage stakeholders (property managers, utility partners, site residents, community members) for feedback on system operation, performance and user experience.
- Collect EV charger and ALM and distribution monitoring system performance data that includes, but is not limited to:
  - EV charging session summaries including aggregate demand
  - Distribution Transformer dynamic capacity utilization
- Develop a *Pilot Performance Report* that summarizes pilot activities, lists performance data collected, and provides analysis of data that can be used to inform scalable and consistent criteria for technology adoption, including future infrastructure planning, utility programs or incentive requirements, and emerging standards.
- Prepare a *CPR Report #2* in accordance with subtask 1.3.
- Participate in a CPR meeting.

#### **Products:**

- Pilot Performance Report (draft and final)
- CPR Report #2

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#### **GoPowerEV, Inc.**

#### **TASK 4 COMMUNITY ENGAGEMENT AND OUTREACH**

The goal of this subtask is to engage with community stakeholders to understand community needs and provide education on EV charging, EV adoption, EV benefits, grid electrification challenges. The engagement and outreach activities will occur for the communities related to each of the pilot sites.

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

- Collaborate with the project's CBO to engage community stakeholders and understand community charging and electrification needs, especially the needs of MUD residents and management. Engagement activities include, but are not limited to, digital surveys and interviews in multiple languages.
- Collaborate with the project's CBO on pre-installation phase EV charging education session(s) for community MUD residents, covering EV benefits, EV buying options, EV charging costs, grid electrification challenges, and how developed dynamic load management strategy will benefit the grid and community.
- Engage community stakeholders to communicate and collaborate on the pilot plans.
- Collaborate with the project's CBO on post-installation phase EV charging education session(s) for community MUD residents, covering results from project pilot, how community needs were met with developed solution, and how communities with similar charging and electrification needs could benefit from developed solution.
- Provide *EV Charging Educational Material* in a physical and digital format to community members during the pre-installation phase and post-installation phase.
- Provide responses to community questions on the pilot or technology during both pre-installation phase and post-installation phase outreach activities.
- Develop a *Community Engagement and Outreach Report* that includes, but is not limited to:
  - Summary of engagement and outreach activities.
  - Questions from the community and responses to those questions.

##### **Products:**

- EV Charging Educational Material
- Community Engagement and Outreach Report

#### **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 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

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#### **GoPowerEV, Inc.**

- 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 TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES**

The goal of this task is to ensure the technological learning that resulted from the demonstration(s) is captured and disseminated to the range of professions that will be responsible for future deployments of this technology or similar technologies.

#### **The Recipient Shall:**

- Develop and submit a *Project Case Study Plan* that outlines how the Recipient will document the planning, construction, commissioning, and operation of the technology or system being demonstrated. The Project Case Study Plan should include:
  - An outline of the objectives, goals, and activities of the case study.
  - The organization that will be conducting the case study and the plan for conducting it.
  - A list of professions and practitioners involved in the technology's deployment.
  - Specific activities the recipient will take to ensure the learning that results from the project is disseminated to those professions and practitioners.
  - Presentations/webinars/training events to disseminate the results of the case study.
- Present the draft *Project Case Study Plan* to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments* that summarizes comments received from the TAC members on the draft *Project Case Study Plan*. This document will identify:
  - TAC comments the Recipient proposes to incorporate into the final *Technology Transfer Plan*.
  - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Submit the final *Project Case Study Plan* to the CAM for approval.

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- Execute the final Project Case Study Plan and develop and submit a Project Case Study.
- When directed by the CAM, develop presentation materials for a 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:**

- Project Case Study Plan (draft and final)
- Summary of TAC Comments
- Project Case Study (draft and final)
- High Quality Digital Photographs

**V. PROJECT SCHEDULE**

Please see the attached Excel spreadsheet.