



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
January 21, 2025 Business Meeting
Backup Materials for IXP, LLC**

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: 25-121-03j

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: IXP,LLC

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-24-032 with IXP, LLC for a \$3,999,317 grant. This agreement will demonstrate a mobile electric vehicle charging system that integrates mobile battery energy storage and modular, skid-mounted, electric vehicle (EV) supply equipment at four sites in Santa Clara, San Diego, and Los Angeles Counties. The mobile charging system will shift charging loads, increase utilization of existing electrical infrastructure, and enable charger deployment in locations where permanent charger installation would be infeasible due to limited grid infrastructure and construction barriers; 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 January 21, 2025.

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-24-032

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Emily Ou
3. MS-:51
4. Phone Number: 916-232-6334

C. Recipient's Information

1. Recipient's Legal Name: IXP, LLC
2. Federal ID Number: 99-1085269

D. Title of Project

Title of project: Mobile EV Charging Site (MEVCS): An innovative opportunity charging solution for PEV load shifting and challenging duty cycles

E. Term and Amount

1. Start Date: 02/03/2025
2. End Date: 12/31/2027
3. Amount: \$3,999,317.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 1/21/2025.
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name: Emily Ou
5. Time Needed for Business Meeting: 0 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge)

Agenda Item Subject and Description:

IXP, LLC. Proposed resolution approving agreement EPC-24-032 with IXP, LLC for a \$3,999,317 grant and adopting staff's recommendation that this action is exempt from CEQA. This agreement will demonstrate a mobile electric vehicle charging system that integrates mobile battery energy storage and modular, skid-mounted electric vehicle (EV) supply equipment at four sites in Santa Clara, San Diego, and Los Angeles Counties. The mobile charging system will shift charging loads, increase utilization of existing electrical infrastructure, and enable charger deployment in locations where permanent charger installation would be infeasible due to limited grid infrastructure and construction barriers. (EPIC funding) Contact: Emily Ou

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, § 15303 ; Cal. Code Regs., tit. 14, § 15311 ;

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.

California Code of Regulations, title 14, section 15303 provides that projects which consist of the construction and location of limited numbers of new, small facilities or structures; installation of small new equipment and facilities in small structures; and the conversion of existing small structures from one use to another where only minor modifications are made in the exterior of the structure are categorically exempt from the provisions of CEQA. This project involves the temporary construction and installation of a limited number of new, small facilities and structures, including mobile battery energy storage system units and a series of electric vehicle supply equipment (EVSE) skids with associated electrical equipment, all at existing sites. There will be a range of four (4) to twelve (12) structures at each site and there will be four (4) sites in total. Each structure covers no more than ten (10) square feet and is completely removable, having no permanent effect on the environment. Therefore, this project is exempt from CEQA under section 15303.

California Code of Regulations, title 14, section 15311 provides that projects which consist of the construction, or placement of minor structures accessory to (appurtenant to) existing commercial, industrial, or institutional facilities are categorically exempt from the provisions of CEQA. This project involves the



temporary construction and placement of minor structures accessory to (appurtenant to) existing commercial buildings, including a series of EVSE skids and mobile battery energy storage system units. These installations will be accessory to existing commercial building and property. There will be a range of four (4) to twelve (12) structures at each site and there will be four (4) sites in total. Each structure covers no more than ten (10) square feet and is completely removable, having no permanent effect on the environment. Therefore, this project is exempt from CEQA under section 15311.

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
County of Los Angeles	\$ 25,000	\$0



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Subcontractor Legal Company Name	CEC Funds	Match Funds
The Regents of the University of California, on behalf of the San Diego campus	\$ 25,000	\$0
Camect, Inc.	\$ 99,000	\$0
PowerFlex Systems, LLC	\$ 25,000	\$0
Voltedge Systems LLC	\$ 99,000	\$0
SLA Architects Inc	\$ 99,000	\$0
Monterra Technology Inc.	\$ 50,000	\$0
OPF Energy LLC	\$ 99,000	\$0
Acterra: Action for a Healthy Planet	\$ 10,000	\$0
Technolyst	\$ 99,000	\$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
PowerFlex Systems, LLC	\$381,000	\$0
Xingtera Inc.	\$72,000	\$0
KJCALE LLC	\$408,000	\$0
Zoro Tools, Inc.	\$20,000	\$0
Ubiquiti Inc.	\$20,000	\$0
MGM Transformer Co	\$13,600	\$0
Home Depot	\$100,000	\$0
AMAZON	\$164,000	\$0
Maxx Metals	\$54,000	\$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



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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	\$ 3,999,317

TOTAL Amount: \$ 3,999,317

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

M. Recipient’s Contact Information

1. Recipient’s Administrator/Officer

Name: George Lee
Address: 392 1st Street
City, State, Zip: Los Altos, CA 94022
Phone: 650-469-3377
E-Mail: george@ixp.art

3. Recipient’s Project Manager

Name: George Lee
Address: 392 1st Street
City, State, Zip: Los Altos, CA 94022
Phone: 650-469-3377
E-Mail: george@ixp.art

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”.



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 01/2024)

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: Emily Ou

Approval Date: 12/10/2024

Branch Manager: Rey Gonzalez

Approval Date: 12/13/2024

Director: Rey Gonzalez on behalf of Director

Approval Date: 12/13/2024

EXHIBIT A
Scope of Work
IXP, LLC

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR¹	Task Name
1		General Project Tasks
2		Hardware Improvements
3	X	Software Improvements
4	X	Demonstration Pilots
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
MBESS	Mobile Battery Energy Storage System
MEVCS	Mobile Electric Vehicle Charging Site
PEV	Plug-in Electric Vehicle
TAC	Technical Advisory Committee
TRL	Technology Readiness Level

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, deployment, and demonstration of the Mobile Electric Vehicle Charging Site (MEVCS) as an innovative opportunity charging solution that can shift plug-in electric vehicle (PEV) charging loads, avoid grid upgrades, and enable charger deployment in locations that would otherwise be infeasible due to limited grid infrastructure, construction barriers, or high costs.

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.

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B. Problem/ Solution Statement

Problem

Traditional electric vehicle (EV) charging sites face challenges in deployment due to high installation costs, inadequate grid infrastructure, and construction constraints. While mobile charging solutions have been proposed in the past, these alternatives often suffer from significant scalability issues, primarily because of problems with integration, reliability, and the speed at which they can be deployed. For California to reach its transportation electrification goals, these scalability issues must be addressed.

Solution

The MEVCS can be installed in various settings where traditional permanent EV charging stations are infeasible due to limited grid infrastructure, construction barriers, or high costs. The MEVCS can connect to and increase utilization of existing grid infrastructure while shifting PEV loads away from peak grid congestion periods. Its key innovations include the capability for rapid deployment and scalability for sites with infrastructure limitations due to its portable, modular, simple, and configurable design consisting of a mobile battery energy storage system (MBESS) that can connect to existing grid infrastructure, EVSE skids, lighting, and security cameras. Additionally, using the Recipient's site design tool, a MEVCS setup can be automatically created and planned for deployment within hours, rather than the months or years typically required.

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

- Advance the development, productization, and pilot implementation of the MEVCS for real-world applications.
- Enhance the hardware, upgrade the software, establish multiple pilot sites, and evaluate the MEVCS's performance, quantifying its benefits for ratepayers.
- Reduce the average site deployment time from months to hours and achieve a cost advantage compared to traditional sites.

Ratepayer Benefits:² The MEVCS enhances electric reliability by integrating local battery storage, which protects against grid outages and transient conditions. The MEVCS is equipped with load management technologies that allow it to shift PEV charging loads and accommodate PEVs with demanding duty cycles, minimizing the need for costly electrical grid upgrades and

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).

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thereby reducing the financial burden on ratepayers. Additionally, the MEVCS improves safety, as the battery serves as an energy buffer, enabling more predictable and steadier grid charging rather than abrupt fluctuations.

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 significantly increasing the deployment of PEV charging stations in the required timeline. Given that the MEVCS tackles the principal challenges associated with timely EV charging site deployment, it presents a clear and actionable solution.

Agreement Objectives

The objectives of this Agreement are to:

- Upgrade the physical components of the MEVCS to ensure reliability and performance for up to 24 level 2 and level 3 charging ports per demonstration site under various operational conditions.
- Refine the software that controls the charging process, improve user interface and functionality, and integrate advanced features like smart charging and load management.
- Test the MEVCS in real-world settings to identify practical challenges and showcase its capabilities to stakeholders and the public.
- Measure, validate, and assess the impact of the MEVCS in terms of environmental benefits, cost savings, and user satisfaction, providing quantifiable data to gauge success.

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.

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.

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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**

- 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:

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- 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.

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;

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IXP, LLC

- 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 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:

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- 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 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:

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- 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
- Provide verbal answers to the CAM during the call.

Product:

- Email to CAM concurring with call summary notes.

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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

Subtask 1.7.2 Final Report

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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

MATCH FUNDS, PERMITS, AND SUBAWARDS

EXHIBIT A

Scope of Work

IXP, LLC

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)*

EXHIBIT A

Scope of Work

IXP, LLC

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

Subtask 1.10 Obtain and Execute Subawards and Agreements with Site Hosts The goal of this task is to ensure quality products and to execute subrecipients and site host agreements, as applicable, required to carry out the tasks under this Agreement consistent with the Agreement Terms and Conditions and the Recipient's own procurement and contracting policies and procedures.

The Recipient shall:

- Execute and manage subawards and coordinate subrecipient activities.
- Execute and manage site host agreements, and ensure the right to use the project site throughout the term of the Agreement, as applicable. A site host agreement is not required if the Recipient is the site host.

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- Notify the CEC in writing immediately, but no later than five calendar days, if there is a reasonable likelihood the project site cannot be acquired or can no longer be used for the project.
- Submit a letter to the CAM describing the subawards and any site host agreement needed or stating that no subawards or site host agreements are required.
- If requested by the CAM, submit a draft of each *Subaward* and any site host agreement required to conduct the work under this Agreement to the CAM for review.
- If requested by the CAM, submit a final copy of each executed subaward and any site host agreement.
- If Recipient intends to add new subrecipients or change subrecipients, then the Recipient shall notify the CAM.

Products:

- Letter describing the subawards needed, or stating that no subawards are required
- Draft subaward (if requested)
- Final subaward (if requested)
- Draft site host agreement (if requested)
- Final site host agreement (if requested)

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.

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- 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

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.

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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-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.

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- 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: HARDWARE IMPROVEMENTS

The goal of this task is to improve the hardware on the MEVCS to be optimized for TRL7-8 deployments.

The Recipient shall:

- Ruggedize MEVCS for public environments.
 - Upgrade to continuous armored metal-clad cable used in hazardous locations (MC-HL).
 - Enclose all camlock connections in a lockable cabinet.
- Enable automatic reconfigurability.
 - Add automatic phase detection with powerline communication.
 - Add automatic updating of topology when any component has been modified.
- Prepare MEVCS for mass production.
 - Create Bill of Materials (BOMs) for each skid variant, including CAD rendering.
 - Create procurement plan and manufacturing procedure.
- Obtain any necessary Underwriters Laboratories (UL) certification as a complete system.
 - Engage in discussions with UL on required certifications for the MEVCS.
 - Document individual components.
 - Stress equipment in different environments.
- Prepare MEVCS hardware for site demonstration.
 - Assess site conditions, including space, environment, and compliance with regulations.
 - Confirm transportation plan, ensuring safe delivery and accessibility for hardware.
 - Verify power connection readiness, including compatibility and load capacity.
 - Test cellular signal strength to ensure reliable data communication.
 - Determine vehicle types, charging needs, and duty cycles for optimized performance.
- Prepare *Hardware Specifications Report* which includes a high-level executive summary including, but not limited to:
 - Hardware components of the MEVCS.
 - How hardware components can expedite pilot support and functionality.
 - Technical issues encountered.
- Prepare *Hardware Verification Report* which includes, but is not limited to:
 - Hardware testing procedures and results.

Products:

- Hardware Specifications Report (draft and final)
- Hardware Verification Report (draft and final)

TASK 3: SOFTWARE IMPROVEMENTS

EXHIBIT A

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IXP, LLC

The goal of this task is to improve the software on the MEVCS to be optimized for TRL7-8 deployments.

The Recipient shall:

- Create operator dashboards.
 - Enable customer portal login and asset tracking.
 - Allow real-time viewing of operational data.
 - Allow customer self-service report generation.
- Create site design tool.
 - Create website to visualize MEVCS in augmented reality.
 - Create automated design function.
- Prepare MEVCS software for site demonstration.
 - Configure system settings, including charging profiles and operational parameters.
 - Test software integration with backend systems for monitoring and control.
 - Verify user interface functionality for seamless operation and intuitive user experience.
 - Ensure secure data transmission, including encryption and compliance with cybersecurity standards.
 - Conduct end-to-end testing to confirm reliable communication between hardware, software, and network.
- Prepare *Software Specifications Report* which includes a high-level executive summary including but not limited to:
 - Software components of the MEVCS
 - How software components can expedite pilot design, configuration, and management
 - Technical issues encountered and mitigation plans.
- Prepare *Software Verification Report* which includes but is not limited to:
 - Software testing procedures and results.
- Prepare a *CPR Report #1* in accordance with subtask 1.3 (CPR Meetings)
- Participate in a CPR meeting.

Products:

- Software Specifications Report (draft and final)
- Software Verification Report (draft and final)
- CPR Report #1

TASK 4: DEMONSTRATION PILOTS

The goal of this task is to deploy the MEVCS at demonstration sites where building traditional EV charging was not feasible.

The Recipient shall:

- Prepare *Measurement and Verification Plan* which includes, but is not limited to:
 - Planned pilot setup, configuration, and deployment at each planned demonstration site including documentation of installation procedures.

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- List of performance parameters to be measured and reported including, but not limited to:
 - Installation cost
 - Installation timeline
 - Operational cost
 - Electricity cost
 - Charge/discharge events for the MBESS
 - Charging speed
 - Energy usage patterns
 - Energy throughput
 - Peak demand reduction
 - Overall efficiency
 - System uptime
 - Utilization
 - User satisfaction
- Identification of the method of collection for each performance parameter.
- Definition of the frequency of collection and method of reporting.
- Description of maintenance and service of the MEVCS at each demonstration site, as required.
- Prepare a *CPR Report #2* in accordance with subtask 1.3 (CPR Meetings)
- Participate in a CPR meeting.

Products:

- Measurement and Verification Plan (draft and final)
- CPR Report #2

Subtask 4.1: IXP Headquarters Pilot

The objective of this subtask is to install the MEVCS at the parking lot at IXP headquarters, where limited grid capacity and long-term plans for constructing a new office building have prevented the expansion of existing EV chargers. In the past year, 3 new multi-family buildings finished construction within walking distance, driving up EV charging demand.

The Recipient shall:

- Deploy MEVCS configured as MBESS and a target of 1 fast charger and 4 dual port EVSE skids with LED lighting and security cameras.
- Connect MEVCS to existing Level 2 EVSE as a power source.
- Collect performance data and compare effectiveness of MEVCS to a traditional EVSE site.
- Prepare *Pilot #1 Measurement and Verification Report* which includes, but is not limited to:
 - Pilot setup, configuration, and deployment
 - Measurements collected during the pilot period.
 - Technical issues encountered.

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Products:

- Pilot #1 Measurement and Verification Report (draft and final)

Subtask 4.2: Los Altos Pilot

The objective of this subtask is to install the MEVCS at the downtown parking plaza in Los Altos, where limited grid capacity and long-term plans for constructing a new parking structure have prevented the expansion of existing EV chargers to accommodate surging demand.

The Recipient shall:

- Work with City of Los Altos to review previous EVSE deployment hurdles.
- Deploy MEVCS configured as MBESS and a target of 1 fast charger and 6 quad port EVSE skids with LED lighting and security cameras.
- Connect MEVCS to existing Level 2 EVSE as a power source.
- Collect performance data and compare effectiveness of MEVCS to a traditional EVSE site.
- Prepare *Pilot #2 Measurement and Verification Report* which includes, but is not limited to:
 - Pilot setup, configuration, and deployment
 - Measurements collected during the pilot period.
 - Technical issues encountered.

Products:

- Pilot #2 Measurement and Verification Report (draft and final)

Subtask 4.3: LA County Pilot

This subtask focuses on deploying the MEVCS at a recreational center with limited grid capacity and the intricate process of obtaining permits and navigating permitting challenges. These factors create uncertainty about the feasibility of installing EV chargers in time for the 2028 Olympics.

The Recipient shall:

- Work with County of Los Angeles to review previous EVSE deployment hurdles.
- Deploy MEVCS configured as mobile battery energy storage system (MBESS) and a target of 12 dual port EVSE skids with LED lighting and security cameras.
- Connect MEVCS to existing electrical infrastructure near the welcome information booth as a power source.
- Collect performance data and compare effectiveness of MEVCS to a traditional EVSE site.
- Prepare *Pilot #3 Measurement and Verification Report* which includes, but is not limited to:
 - Pilot setup, configuration, and deployment
 - Measurements collected during the minimum pilot period of 6 months.
 - Technical issues encountered.

Products:

- Pilot #3 Measurement and Verification Report (draft and final)

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Subtask 4.4: Medical Center Pilot

This subtask aims to implement the MEVCS at a medical center, where limited grid capacity and the challenges of construction at a critical 24/7 facility have posed significant obstacles to establishing a traditional EV charging site.

The Recipient shall:

- Work with the demonstration site partner to review previous EVSE deployment hurdles.
- Deploy MEVCS configured as MBESS and a target of 9 dual port EVSE skids with LED lighting and security cameras.
- Connect MEVCS to existing electrical infrastructure for parking lot lighting as a power source.
- Collect performance data and compare effectiveness of MEVCS to a traditional EVSE site.
- Prepare *Pilot #4 Measurement and Verification Report* which includes, but is not limited to:
 - Pilot setup, configuration, and deployment
 - Measurements collected during the pilot period.
 - Technical issues encountered.

Products:

- Pilot #4 Measurement and Verification Report (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 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), and provide *Documentation of Project Profile on EnergizeInnovation.fund*, including the profile link.

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- 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), 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.
- Execute the final Project Case Study Plan and develop and submit a Project Case Study.

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- 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.