



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
February 12, 2025 Business Meeting
Backup Materials for Electric Power Research Institute, 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: 25-212-09a

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: Electric Power Research Institute, 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-24-030 with Electric Power Research Institute, Inc. for a \$2,000,000 grant. This agreement will demonstrate an innovative energy management system at schools in the Los Angeles Unified School District to make the facilities more responsive to grid and occupant needs. The control system deployed will be evaluated to assess performance, and potential benefits including its ability to reduce and shift energy usage when electricity is less expensive and polluting; 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 February 12, 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-24-030

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Dustin Davis
3. MS-:51
4. Phone Number: 916-343-8542

C. Recipient's Information

1. Recipient's Legal Name: Electric Power Research Institute, Inc.
2. Federal ID Number: 23-7175375

D. Title of Project

Title of project: SUPPLIES – Scaling Up Virtual Power Plants through Interoperable Energy Management Systems in K-12 Schools

E. Term and Amount

1. Start Date: 2/24/2025
2. End Date: 3/29/2030
3. Amount: \$2,000,000.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 2/12/2025 .
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Dustin Davis
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge).

Agenda Item Subject and Description:

Electric Power Research Institute, Inc. Proposed resolution approving agreement EPC-24-030 with Electric Power Research Institute, Inc. for a \$2,000,000 grant, and adopting staff's recommendation that this action is exempt from CEQA. This agreement will demonstrate an innovative energy management system at schools in the Los Angeles Unified School District to make the facilities more responsive to grid and occupant needs. The control system deployed will be evaluated to assess performance, and potential benefits including its ability to reduce and shift energy usage when electricity is less expensive and polluting. (EPIC funding) Contact: Dustin Davis (Staff Presentation: 5 minutes)

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

This project is exempt from CEQA under 22 CCR 15301. This exemption applies to this project since the work involves minor alterations of existing public or private structures, facilities, mechanical equipment, or topographical features, and which involve negligible or no expansion of use beyond that existing. This project involves the installation of monitoring devices and associated hardware and software at two designated Los Angeles Unified School District sites that will optimize energy utilization related to temperature controls, lighting, and electric vehicle charging. For these reasons, the project will not have a significant environmental impact and is exempt under section 15301.

This project is exempt from CEQA under 22 CCR 15306. This exemption applies to this project since the work involves basic data collection, research, experimental management, and resource evaluation activities which do not result in a serious or major disturbance to an environmental resource. This project involves data collection at the designated Los Angeles Unified School District sites for information gathering purposes to understand the performance and potential benefits of the control system deployed. For these reasons, the project will not have a significant environmental impact and is exempt under 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



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

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.

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.

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
Los Angeles Unified School District	\$ 190,081	\$0
Kliwer and Associates LLC	\$ 140,000	\$0
New Buildings Institute, Inc.	\$ 25,000	\$20,000
Los Angeles Brotherhood Crusade - Black United Fund, Inc.	\$ 60,000	\$0
Spokane Edo LLC	\$ 840,919	\$100,000
Pacifica Services, Inc.	\$ 71,082	\$0
STV Construction, Inc. / Simpson & Simpson Management Consulting Inc. (Joint Venture)	\$ 88,677	\$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
No vendors to report	\$	\$

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	\$ 2,000,000

TOTAL Amount: \$ 2,000,000

R&D Program Area: ICMB: IAW

Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: 101

M. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Nancy Martin

Address: 942 Corridor Park Blvd

City, State, Zip: Knoxville, TN 37932-3723

Phone: 865-218-5937

E-Mail: nmartin@epri.com

3. Recipient's Project Manager

Name: Agatha Kazdan

Address: 3420 Hillview Ave

City, State, Zip: Palo Alto, CA 94304-1355

Phone: 415-416-0678

E-Mail: akazdan@epri.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-23-309
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: Dustin Davis

Approval Date: 11/20/2024

Branch Manager: Cody Taylor

Approval Date: 12/04/2024

Director: Cody Taylor for Angela Gould

Approval Date: 12/04/2024

Exhibit A
Scope of Work
Electric Power Research Institute (EPRI)

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR ¹	Task Name
1		General Project Tasks
2		Design Site-Specific EMS Platforms
3	X	Field Measurement and Verification
4	X	Technology Installation and Workforce Development
5		Market Deployment Assessment
6		Evaluation of Project Benefits
7		Technology/Knowledge Transfer Activities

B. Acronym/Term List

Acronym/Term	Meaning
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CBO	Community-Based Organization
CEC	California Energy Commission
CPR	Critical Project Review
DER	Distributed Energy Resources
EMS	Energy Management System
IOU	Investor-owned Utility
M&V	Measurement and Verification
OEM	Original Equipment Manufacturer
TAC	Technical Advisory Committee

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

A. Purpose of Agreement

The purpose of this Agreement is to fund the demonstration and evaluation of an interoperable energy management system (EMS) platform in commercial buildings with participation in an investor-owned utility (IOU) demand response program to understand the feasibility and scalability of load shifting and load shedding participation of commercial buildings.

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

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

B. Problem/ Solution Statement

Problem

Commercial buildings represent a significant portion of the nation's electrical usage and greenhouse gas emissions. With the number of year-round large building systems (e.g., heating, ventilation, air conditioning, lighting, and equipment plug load), commercial buildings can offer substantial potential for demand flexibility. Policy measures such as California's Assembly Bill 1738 (AB1738) that requires existing multifamily and commercial buildings to install electric vehicle (EV) charging stations will further increase commercial building demand². Today's energy management system (EMS) and demand flexibility technologies are proprietary and lack seamless data exchange, hindering the adoption of automated load shifting and load shedding in commercial buildings. The lack of interoperability among EMS and demand flexibility technologies creates barriers to achieving the state of California's ambitious energy and climate goals of carbon neutrality by 2045³ and statewide load shift goal of 7,000 megawatts (MW) by 2030⁴. There is an industry need for more interoperable EMS technologies and approaches to overcome these barriers and broaden participation of demand flexibility in commercial buildings.

Solution

The Recipient will design, demonstrate, and evaluate an interoperable EMS platform for two California-based K-12 school sites that will use open data protocols and two-way data communication between the building loads, DERs, the utility grid, and other public entities for cost-effective load shifting and load shedding in commercial buildings. The solution is also intended to support measures such as California's Senate Bill 48, the Building Energy Savings Act (SB48) that could lead to the implementation of statewide building performance standards of existing buildings⁵, enhancing energy efficiency and greenhouse gas (GHG) emissions reductions for building.

The interoperable EMS platform will be customer-centric by allowing commercial buildings to use their existing building management system (BMS) and integrate a layer of supervisory control through a commercially available EMS platform with third party integration and demand flexibility capability. The augmented EMS platform will be able to receive signals from the utility for demand response, from the California Independent System Operator (CAISO) for grid emissions, and other entities such as CEC's Market Informed Demand Automation Server (MIDAS) for pricing. The EMS platform can then compile and sort through the signal hierarchy to intelligently flex the commercial building loads and DERs through open protocols, e.g., BACnet Standard 135.

² Assembly Bill 1738. (California, 2022).

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB1738.

³ Governor Gavin Newsom. (2023). Building the Electricity Grid of the Future: California's Clean Energy Transition Plan. <https://www.gov.ca.gov/wp-content/uploads/2023/05/CAEnergyTransitionPlan.pdf>.

⁴ California Energy Commission. (2023). SB 846 Load Shift Goal Commission Report. <https://efiling.energy.ca.gov/GetDocument.aspx?tn=250357&DocumentContentId=85095>.

⁵ Majersik, C. (2023). With New Law, California Moves Towards Statewide Building Performance Standard. <https://imt.org/news/with-new-law-california-moves-towards-statewide-building-performance-standard/>.

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

C. Goals and Objectives of the Agreement

Agreement Goals

The goal of this Agreement is to:

- Design, demonstrate, and evaluate a minimum Technology Readiness Level (TRL) 7, interoperable EMS platform, integrated with HVAC, lighting, and EV charging loads, in commercial buildings, each site with at least 50,000 ft² of gross floor area and preferably located within a disadvantaged community.
- Reduce building loads by at least 10% during the sites' monthly peak hour in summer months and by at least 5% during winter months.

Ratepayer Benefits:⁶ This Agreement will result in the ratepayer benefits of greater electricity reliability and lower costs by allowing commercial buildings to smartly respond and adjust their load based on emergency and emissions-based signals from the grid. When the grid is congested or experiencing emergencies, the interoperable EMS platform helps manage the incoming grid signals to reduce building consumption where possible and improve the reliability of the grid. This translates to lower costs for ratepayers by reducing and/or avoiding the utility costs of running emissions-intensive peaker plants to mitigate grid congestion or emergencies. By enrolling more commercial buildings into a utility demand response program and leveraging the interoperable EMS platform, customers directly benefit from reducing their commercial demand charges and energy costs from intelligently load shedding and load shifting peak load. By reducing peak load and avoiding the use of peaker plants, ratepayers also benefit from significant greenhouse gas (GHG) emissions reductions, which provide non-energy benefits such as improved air quality and health outcomes.

Technological Advancement and Breakthroughs:⁷ This Agreement will lead to technological advancement and breakthroughs to overcome interoperability barriers of current demand flexibility technologies to achieve the State of California's statutory energy goals by augmenting a commercially available EMS platform with interoperability and demand flexibility capabilities to advance from Technology Readiness Level (TRL) 7 to 8 by the end of the project.

Current state-of-the-art building control technologies, such as Java Application Control Engine (JACE) and Niagara framework, support automated demand response (DR) signals but rely on rules-based, static controls to turn off non-critical loads and have limited ability to integrate with emerging technologies, e.g., solar photovoltaic (PV) and EV charging. The proposed EMS platform and in this project is innovative in that it utilizes a novel "grey-box" model predictive control (MPC) approach that combines physics-based models of the site with machine learning of the on-site data to optimize building performance to multiple objectives (e.g., reducing energy consumption during peak hours and shifting loads towards hours of lower grid-carbon while maintaining comfort and adequate HVAC and lighting to classrooms). The solution intends to

⁶ 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).

⁷ California Public Resources Code, Section 25711.5(a) also requires EPIC-funded projects to lead to technological advancement and breakthroughs to overcome barriers that prevent the achievement of the state's statutory and energy goals.

Exhibit A Scope of Work Electric Power Research Institute (EPRI)

bring more intelligence, flexibility, and enhanced two-way communication to traditional building controls, meeting additional objectives beyond peak demand reduction targets.

Agreement Objectives

The objectives of this Agreement are to:

- Identify opportunities for widespread EMS adoption through standards-based signaling approaches (e.g., openADR) and identifying any interoperability challenges with implementation approaches for various triggers, e.g., DR signals, price signals, and grid carbon signals.
- Quantify the load-shifting potential, duration, energy cost savings, and GHG emissions reductions of the EMS platform through field M&V and data analysis with a third party M&V implementer.
- Identify business model challenges and opportunities for widespread EMS adoption in commercial buildings.
- Evaluate demand flexibility in commercial buildings as a viable pathway for compliance with various policy measures that can ultimately help achieve California's load shifting 2030 goal.
- Study the effects of community engagement as a driver for the adoption of interoperable EMS solutions in commercial buildings.
- Enroll the two school sites in an IOU demand response program by project completion.

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.

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

- 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:

- 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.

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

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;
 - 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

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

- 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:

- 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.

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

Recipient Products:

- CPR Report(s)

CAM Products:

- CPR Agenda(s)
- Progress Determination

Subtask 1.4 Final Meeting

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

The Recipient shall:

- Meet with CEC staff to present project findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement. This meeting will be attended by the Recipient and CAM, at a minimum. The meeting may occur in person or by electronic conferencing (e.g., WebEx), with approval of the CAM.

The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be divided into two separate meetings at the CAM's discretion.

- The technical portion of the meeting will involve the presentation of findings, conclusions, and recommended next steps (if any) for the Agreement. The CAM will determine the appropriate meeting participants.
- The administrative portion of the meeting will involve a discussion with the CAM of the following Agreement closeout items:
 - Disposition of any procured equipment.
 - The CEC's request for specific "generated" data (not already provided in Agreement products).
 - Need to document the Recipient's disclosure of "subject inventions" developed under the Agreement.
 - "Surviving" Agreement provisions such as repayment provisions and confidential products.
 - Final invoicing and release of retention.
- 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.

Exhibit A

Scope of Work

Electric Power Research Institute (EPRI)

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

The CAM shall:

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

The Recipient shall:

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

Product:

- Email to CAM concurring with call summary notes.

Subtask 1.6 Quarterly Progress Reports and Invoices

The goals of this subtask are to: (1) periodically verify that satisfactory and continued progress is made towards achieving the project objectives of this Agreement; and (2) ensure that invoices contain all required information and are submitted in the appropriate format.

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.

Exhibit A Scope of Work Electric Power Research Institute (EPRI)

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

Subtask 1.7.1 Final Report Outline

The Recipient shall:

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

Recipient Products:

- Final Report Outline (draft and final)

CAM Products:

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

Subtask 1.7.2 Final Report

The Recipient shall:

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

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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

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.

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- 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. 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*)

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Subtask 1.10 Subawards and Agreements with Site Hosts

The goals of this subtask are to: (1) procure subawards and site host agreements, as applicable, 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 and the Recipient's own procurement and contracting policies and procedures.

The Recipient shall:

- Execute, manage and coordinate subrecipients activities in accordance with the requirements of this Agreement.
- 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 is not required if the Recipient is the site host.
- 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.
- 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* and any site host agreement required to conduct the work under this Agreement.
- If requested by the CAM, submit a final copy of each executed subaward and any site host agreement.
- 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 and Site Host Agreement (*if requested by the CAM*)

TECHNICAL ADVISORY COMMITTEE

Subtask 1.11 Technical Advisory Committee (TAC)

The goal of this subtask is to create an advisory committee for this Agreement. The TAC should be composed of diverse professionals. The composition will vary depending on interest, availability, and need. TAC members will serve at the CAM's discretion. The purpose of the TAC is to:

- Provide guidance in project direction. The guidance may include scope and methodologies, timing, and coordination with other projects. The guidance may be based on:
 - Technical area expertise;
 - Knowledge of market applications; or
 - Linkages between the Agreement work and other past, present, or future projects (both public and private sectors) that TAC members are aware of in a particular area.
- Review products and provide recommendations for needed product adjustments, refinements, or enhancements.
- Evaluate the tangible benefits of the project to the state of California, and provide recommendations as needed to enhance the benefits.
- Provide recommendations regarding information dissemination, market pathways, or commercialization strategies relevant to the project products.

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

The TAC may be composed of qualified professionals spanning the following types of disciplines:

- Researchers knowledgeable about the project subject matter;
- Members of trades that will apply the results of the project (e.g., designers, engineers, architects, contractors, and trade representatives);
- Public interest market transformation implementers;
- Product developers relevant to the project;
- U.S. Department of Energy research managers, or experts from other federal or state agencies relevant to the project;
- Public interest environmental groups;
- Utility representatives;
- Air district staff; and
- Members of relevant technical society committees.

The Recipient shall:

- Prepare a *List of Potential TAC Members* that includes the names, companies, physical and electronic addresses, and phone numbers of potential members. The list will be discussed at the Kick-off meeting, and a schedule for recruiting members and holding the first TAC meeting will be developed.
- Recruit TAC members. Ensure that each individual understands member obligations and the TAC meeting schedule developed in subtask 1.12.
- Prepare a *List of TAC Members* once all TAC members have committed to serving on the TAC.
- Submit *Documentation of TAC Member Commitment* (such as Letters of Acceptance) from each TAC member.

Products:

- List of Potential TAC Members
- List of TAC Members
- Documentation of TAC Member Commitment

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.
- Present the draft project performance metrics at the first TAC meeting to solicit input and comments from the TAC members.

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- 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: DESIGN SITE-SPECIFIC EMS PLATFORMS

The goal of this task is to design an interoperable EMS platform for the two school sites.

The Recipient shall:

- Conduct site visits – minimum one for each site – to assess the existing building controls systems, loads, and DERs.
- Prepare a combined *Site Audit Memo* for both sites that will include but is not limited to:
 - A description with pictures of the existing controls systems and building loads.
 - A summary of the existing control hierarchy and architecture.
 - A discussion on integration approaches of the EMS platform and existing controls systems.
- Design site-specific interoperable EMS platforms.
 - Conduct meeting(s) with project stakeholders including site provider, technology provider(s), utility partner, and CBO partner to gather stakeholder and community input on the designs and feedback on community engagement and workforce development opportunities.
 - Develop first level set of requirements, designs, and specifications of EMS platform and integration with building loads and DERs.
 - Interview identified community members to understand community needs and workforce skill gaps to further refine community engagement and workforce development plan.
- Prepare a combined *EMS Design Report* for both sites documenting the interoperable EMS platform objectives, design, and strategy.

Products:

- Site Audit Memo
- EMS Design Report

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TASK 3: FIELD MEASUREMENT AND VERIFICATION

The goal of this task is to develop and conduct a field M&V study to validate the performance objectives of the EMS platform.

The Recipient shall:

- Coordinate with third party M&V implementer on overall M&V planning and execution, e.g., data collection, data transfer, data analysis, and report generation.
- Prepare a combined *Field Measurement and Verification Planning Report* outlining the M&V plans for both host sites, including at least 12 months of pre-installation data, at least 12 months of post-installation data of the EMS platform, and M&V bill of materials.
- Procure M&V materials and equipment for remote data monitoring.
- Install M&V materials and equipment for remote data monitoring at each of the two sites.
- Collect at least 12 months of post-installation data, which includes both winter and summer seasons.
- Analyze field data results for load reduction, energy cost savings, GHG emissions reduction, load shifting potential, and duration.
- Conduct M&V decommissioning to remove M&V materials and equipment after the completion of the M&V study.
- Prepare a combined *Field Measurement and Verification Results Report* to summarize the collected and analyzed results for both sites.
- Prepare *CPR Report #1* and participate in CPR meeting in accordance with subtask 1.3.

Products:

- Field Measurement and Verification Planning Report
- Field Measurement and Verification Results Report
- CPR Report #1

TASK 4: TECHNOLOGY INSTALLATION AND WORKFORCE DEVELOPMENT

The goals of this task are to perform the installation and commissioning of the interoperable EMS platform at the host sites and conduct workforce development training with the CBO partner.

The Recipient shall:

- Procure installation materials and install the EMS platform at both sites.
 - Coordinate with each host site's existing original equipment manufacturer (OEM) hardware provider(s) on integration features (e.g., BACnet, OpenADR protocols).
- Prepare a combined *Technology Installation Schedule Memo* that summarizes the schedule of technology procurement and installation for both sites.
- Conduct commissioning post-installation of the EMS platforms with site provider input.
- Coordinate with the utility partner to understand enrollment requirements for the two host sites for the appropriate utility demand response program.
- Coordinate with the CBO partner and site provider to organize at least (1) on-the-job workforce training session on the installed EMS platform to members of the disadvantaged community.
- Prepare a *Workforce Training Workshop Summary Memo* summarizing the details and feedback from the on-the-job workforce training session(s).
- Prepare *CPR Report #2* and participate in CPR meeting in accordance with subtask 1.3.

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Products:

- Technology Installation Schedule Memo
- Workforce Training Workshop Summary Memo
- CPR Report #2

TASK 5: MARKET DEPLOYMENT ASSESSMENT

The goal of this task is to assess the scalability of the interoperable EMS platform to increase participation of commercial building owners in utility demand flexibility programs.

The Recipient shall:

- Prepare a *Market Deployment Assessment Report* that includes but is not limited to the following:
 - Summarizing the integration capabilities between the EMS platform software components and OEM hardware components, utility demand response signals, and other third party signals (e.g., MIDAS).
 - Conducting surveys with utilities, EMS and OEM providers, commercial building owners, and other relevant stakeholders to provide feedback on interoperability challenges, regulatory obstacles, and demand flexibility program participation barriers.
 - Strategies for scaling up effective participation of commercial building owners in utility demand flexibility programs.
 - Recommendations for partnerships and strategies for increasing adoption of open standards to address interoperability challenges.

Products:

- Market Deployment Assessment Report

TASK 6: 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.

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- 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 7: 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.
- When directed by the CAM, develop presentation materials for a CEC sponsored conference/workshop(s) on the project.

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- 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.
- Conduct at least (1) workshop with site host's facility management staff to share project results and identify scalability opportunities to other schools within their territory.
- Present project summary and results at minimum (1) relevant conference.
- Feature project summary and results in at least (1) online platform.
- Summarize technology transfer activities in a *Technology Transfer Report*.

Products:

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

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.