



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
September 10, 2025 Business Meeting
Backup Materials for NeoCharge Incorporated**

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: 25-0910-XX

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: NeoCharge Incorporated

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-25-014 with NeoCharge Incorporated for a \$1,598,747 grant. This project will develop and demonstrate an affordable EV submetering solution that combines multiple measurement pathways with integrated meter data management agent functionality to enable customers to access EV-specific rates at residential homes across California without the need for expensive equipment upgrades; and

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

CERTIFICATION

The undersigned Secretariat to the CEC does hereby certify that the foregoing is a full, true, and correct copy of a resolution duly and regularly adopted at a meeting of the CEC held on September 10, 2025.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Kim Todd
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-25-014

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Antonio Gomez
3. MS-:51
4. Phone Number: 916-232-9188

C. Recipient's Information

1. Recipient's Legal Name: NeoCharge Incorporated
2. Federal ID Number: 83-2691713

D. Title of Project

Title of project: Fully Unified EV Submetering & Intelligent Optimization Nexus (FUSION)

E. Term and Amount

1. Start Date: 9/15/2025
2. End Date: 3/31/2029
3. Amount: \$1,598,747.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 9/10/2025 .
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Antonio Gomez
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: Electric Program Investment Charge (EPIC)

Agenda Item Subject and Description:

NeoCharge Incorporated. Proposed resolution approving agreement EPC-25-014 with NeoCharge Incorporated for a \$1,598,747 grant and adopting staff's recommendation that this action is exempt from CEQA. This project will develop and demonstrate an affordable EV submetering solution that combines multiple measurement pathways with integrated meter data management agent functionality to enable customers to access EV-specific rates at residential homes across California without the need for expensive equipment upgrades.



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”:

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 ;

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

No

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

Cal. Code Regs., tit 14, sec. 15301 provides that projects that consist of the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, involving negligible or no expansion of existing or former use, are categorically exempt from the provisions of CEQA. The locations affected by the proposed project are at existing facilities, which have already been graded, disturbed, paved, and have structures constructed. Installation and deployment of the NeoCharge FUSION system will require limited alteration activities such as installation of electric vehicle supply equipment and data acquisition equipment at residential sites. The project activities involve negligible or no expansion of existing or former use and will not have a significant effect on the environment and thus fits within section 15301.



This project does not involve impacts on any particularly sensitive environment; 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 sites are 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
Alliance for Sustainable Energy, LLC as Management and Operating Contractor for the National Renewable Energy Laboratory	\$ 170,000	\$0
GRID Alternatives	\$ 229,317	\$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
NeoCharge Incorporated	\$31,875	\$3,750
Amazon Web Services, Inc.	\$75,000	\$0
Wallbox USA INC	\$25,164	\$6,291
TBD - Submeter Supplier	\$5,085	\$0
TBD - EV Telematics API	\$60,000	\$0
Vendor of GRID Alternatives		
TBD - Electrical Installation	\$112,500	\$0
Vendor of Alliance for Sustainable Energy, LLC		
National Renewable Energy Laboratory	\$9,100	\$0

K. Key Partners

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

Key Partner Legal Company Name
No key partners to report

L. Budget Information

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

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
EPIC	24-25	301.001L	\$ 1,598,747

TOTAL Amount: \$ 1,598,747

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: Spencer Harrison
Address: 5818 Ferber St
City, State, Zip: San Diego, CA 92122-3838
Phone: 858-952-8117
E-Mail: spencer@neocharge.io

2. Recipient’s Project Manager

Name: Spencer Harrison
Address: 5818 Ferber St
City, State, Zip: San Diego, CA 92122-3838
Phone: 858-952-8117
E-Mail: spencer@neocharge.io

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-24-302
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	No.



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

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

Approved By

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

Agreement Manager: Antonio Gomez

Approval Date: 7/29/2025

Branch Manager: Reynaldo Gonzalez

Approval Date: 7/30/2025

Director: Jonah Steinbuck (*delegated to Branch Manager*)

Approval Date: N/A

**Exhibit A
Scope of Work
NeoCharge Incorporated**

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR¹	Task Name
1		General Project Tasks
2	X	Technology Development
3	X	System Validation
4		Field Demonstration
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
CDFA-DMS	California Department of Food and Agriculture Division of Measurement Standards
CEC	California Energy Commission
CPR	Critical Project Review
CPUC	California Public Utilities Commission
CT	Current Transformer
EVs	Electric Vehicles
EVSE	Electric Vehicle Supply Equipment
FUSION	Fully Unified EV Submetering & Intelligent Optimization Network
IOU	Investor Owned Utility
MDMA	Meter Data Management Agent
NIST	National Institute of Standards and Technology
NEC	National Electric Code
TAC	Technical Advisory Committee
VGI	Vehicle-Grid Integration

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

A. Purpose of Agreement

The purpose of this Agreement is to fund the development and demonstration of Fully Unified EV Submetering & Intelligent Optimization Network (FUSION), an EV submetering ecosystem that integrates precision measurement, meter data management agent (MDMA) functionality, and intelligent load management in a single low-cost platform.

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 NeoCharge Incorporated

B. Problem/ Solution Statement

Problem

Current submetering and home EV charging solutions require expensive hardware (\$1,500-\$2,500), high installation costs (\$1,000-\$2,000), and often panel upgrades (\$2,000-\$6,000), creating economic barriers to EV adoption and EV-specific rates. A critical three-part market failure exists: prohibitive entry costs exceeding \$4,000-\$10,500 in total, a lack of participating MDMAs, and no cost-effective measurement pathways for telematics-based submetering approaches. This creates a paradoxical situation where utilities and consumers cannot utilize EV-specific rates at scale despite clear regulatory requirements.

These cascading barriers disproportionately impact disadvantaged and multi-family communities, where limited panel capacity (60A-100A) is common and creates a systemic barrier to equitable transportation electrification. Despite the California Public Utilities Commission (CPUC) establishing specific accuracy standards ($\pm 1\%$ laboratory/ $\pm 2\%$ field), the technical validation gap prevents adoption of cost-effective solutions that CPUC cited as potential pathways forward. With 7 million electric vehicles (EVs) projected by 2030 and the state's load shift goal of 7,000 MW by 2030, California requires innovative submetering solutions that enable vehicle-grid integration across all communities while meeting regulatory accuracy, data integrity, and communication requirements.

Solution

FUSION will deliver an integrated, modular solution to these three challenges. First, its multi-pathway measurement framework achieves CPUC's mandated accuracy standards ($\pm 1\%$ laboratory/ $\pm 2\%$ field) through complementary pathways that function independently or together. Pathways include a California Department of Food and Agriculture Division of Measurement Standards (CDFA-DMS) compliant Circuit Pauser, precision current transformer (CT) clamp meter, EV telematics, and EVSE data streams.

Second, an integrated MDMA platform embeds all CPUC-mandated functions in a unified system that implements required data retention (30 days onsite/90 days remote), utility-specific energy data formatting, and dispute resolution processes that deliver secure and scalable data management at a fraction of traditional costs.

Third, grid-interactive architecture combines precise submetering with National Electric Code (NEC) 625.42-compliant energy management that automatically prevents panel overload, eliminating the need for costly panel upgrades in homes with limited capacity.

Exhibit A

Scope of Work

NeoCharge Incorporated

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

- Develop and demonstrate the FUSION submetering system to enable customers to participate in EV-specific rates without installing a connected Smart EV charger or separate utility meter.
- Implement a multi-pathway measurement algorithm achieving $\pm 1\%$ laboratory/ $\pm 2\%$ field accuracy across various validation methods, verified through advanced testing facilities and in the field.
- Create a comprehensive MDMA platform that addresses the current market gap while fully implementing all CPUC-mandated submetering requirements for security, data integrity, and dispute resolution.
- Establish a scalable architecture that can grow with California's EV adoption targets while supporting grid reliability and vehicle-grid innovation (VGI).

Ratepayer Benefits:² This Agreement delivers ratepayer benefits of greater reliability and lower costs by addressing cost barriers to residential EV submetering, which will enable more customers to shift their EV loads in grid-friendly ways. FUSION is expected to save individual customers up to \$584 annually through optimized charging and eliminates installation and panel upgrade costs of \$2,000-\$6,000. At scale, the innovation can save billions in distribution infrastructure investment costs by avoiding service, panel and transformer upgrades while creating 1,000 MW of dispatchable flexible capacity per million EVs.

FUSION's multi-pathway architecture transforms EVs from grid liabilities into valuable grid assets through dispatchable load/circuit control during critical periods. By optimizing charging around renewable generation, the system reduces carbon emissions while enhancing grid reliability and safety through continuous electrical parameter and panel upgrade avoidance. This approach breaks through persistent market barriers to deliver affordable clean transportation benefits across all communities, particularly in low-income and disadvantaged communities where traditional submetering solutions remain economically inaccessible.

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 creating the first commercially viable submetering solution that satisfies all regulatory requirements without costly infrastructure. The multi-pathway measurement architecture represents a fundamental innovation, establishing definitive validation protocols for telematics-based approaches previously deemed too uncertain for regulatory approval. By integrating complete MDMA functionality, FUSION resolves challenges

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

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

Exhibit A Scope of Work NeoCharge Incorporated

that have prevented implementation of EV submetering to-date. The combination of precision measurement with intelligent load management creates an opportunity to transform EVs from grid liabilities into flexible assets that provide dispatchable capacity at gigawatt scale, supporting both SB 846 load-shifting goals and SB 100 renewable integration objectives.

Agreement Objectives

The objectives of this Agreement are to:

- Develop and demonstrate a low-cost, flexible, and robust EV submetering ecosystem that delivers $\pm 1\%$ laboratory and $\pm 2\%$ field accuracy without requiring panel upgrades.
- Validate multiple measurement pathways that meet or exceed CPUC requirements, including telematics-based approaches.
- Deploy FUSION at a target of 75 residential sites (at least 50% in disadvantaged communities), documenting economic and grid benefits.
- Quantify and validate financial benefits including target average installation savings of \$3,000 per site and monthly utility bill savings of \$30-48 through intelligent grid optimization.

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.

Exhibit A Scope of Work NeoCharge Incorporated

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.

Exhibit A
Scope of Work
NeoCharge Incorporated

○ **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 NeoCharge Incorporated

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*.

Exhibit A Scope of Work NeoCharge Incorporated

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., [Teams](#)) 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 NeoCharge Incorporated

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., [Teams](#)/[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

Exhibit A Scope of Work NeoCharge Incorporated

MONTHLY CALLS, REPORTS AND INVOICES

Subtask 1.5 Monthly Calls

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

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

The CAM shall:

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

The Recipient shall:

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

Product:

- Email to CAM concurring with call summary notes.

Subtask 1.6 Quarterly Progress Reports and Invoices

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

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

Exhibit A Scope of Work NeoCharge Incorporated

CAM Product:

- Invoice template

Subtask 1.7 Final Report

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, results, and conclusions of the work performed under this Agreement. When creating the Final Report Outline and the Final Report, the Recipient must use the CEC Style Manual provided by the CAM.

Subtask 1.7.1 Final Report Outline

The Recipient shall:

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

Recipient Products:

- Final Report Outline (draft and final)

CAM Products:

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

Exhibit A Scope of Work NeoCharge Incorporated

Subtask 1.7.2 Final Report

The Recipient shall:

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

Products:

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

CAM Product:

- Written Comments on the Draft Final Report

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MATCH FUNDS, PERMITS, AND SUBAWARDS

Subtask 1.8 Match Funds

The goal of this subtask is to ensure that the Recipient obtains any match funds planned for this Agreement and applies them to the Agreement during the Agreement term.

While the costs to obtain and document match funds are not reimbursable under this Agreement, the Recipient may spend match funds for this task. Match funds must be identified in writing, and the Recipient must obtain any associated commitments before incurring any costs for which the Recipient will request reimbursement.

The Recipient shall:

- Prepare a *Match Funds Status Letter* that documents the match funds committed to this Agreement. If no match funds were part of the application that led to the CEC awarding this Agreement and none have been identified at the time this Agreement starts, then state this in the letter.

If match funds were a part of the application that led to the CEC awarding this Agreement, then provide in the letter a list of the match funds that identifies:

- The amount of cash match funds, their source(s) (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied.
- The amount of each in-kind contribution, a description of the contribution type (e.g., property, services), the documented market or book value, the source (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient must identify its owner and provide a contact name, address, telephone number, and the address where the property is located.
- If different from the solicitation application, provide a letter of commitment from an authorized representative of each source of match funding that the funds or contributions have been secured.
- At the Kick-off meeting, discuss match funds and the impact on the project if they are significantly reduced or not obtained as committed. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide a *Supplemental Match Funds Notification Letter* to the CAM of receipt of additional match funds.
- Provide a *Match Funds Reduction Notification Letter* to the CAM if existing match funds are reduced during the course of the Agreement. Reduction of match funds may trigger a CPR meeting.

Products:

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

Exhibit A Scope of Work NeoCharge Incorporated

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

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The Recipient shall:

- Execute and manage subawards 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 sites throughout the term of the Agreement, as applicable. A site host agreement 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 sites cannot be acquired or can no longer be used for the project and as a result, tasks under this Agreement are unable to be carried out or the Agreement is at-risk of not achieving its goals and objectives.
- 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.
- Submit a *Subaward and Site 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.
- 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 subrecipient additions in the terms and conditions).

Products:

- Subawards and Site Letter
- Draft Subawards (*if requested by the CAM*)
- Draft Site Host Agreement (*if requested by the CAM*)
- Final Subawards (*if requested by the CAM*)
- Final Site Host Agreement (*if requested by the CAM*)

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TECHNICAL ADVISORY COMMITTEE

Subtask 1.11 Technical Advisory Committee (TAC)

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

- Provide guidance in project direction. The guidance may include scope and methodologies, timing, and coordination with other projects. The guidance may be based on:
 - Technical area expertise;
 - Knowledge of market applications; or
 - Linkages between the Agreement work and other past, present, or future projects (both public and private sectors) that TAC members are aware of in a particular area.
- Review products and provide recommendations for needed product adjustments, refinements, or enhancements.
- Evaluate the tangible benefits of the project to the state of California, and provide recommendations as needed to enhance the benefits.
- Provide recommendations regarding information dissemination, market pathways, or commercialization strategies relevant to the project products.
- Help set the project team's goals and contribute to the development and evaluation of its statement of proposed objectives as the project evolves.
- Provide a credible and objective sounding board on the wide range of technical and financial barriers and opportunities.
- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate, to the extent the TAC members feel is appropriate, on behalf of the project in its effort to build partnerships, governmental support, and relationships with a national spectrum of influential leaders.
- Ask probing questions that ensure 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.

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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.

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.

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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 ensure 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.
- 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: TECHNOLOGY DEVELOPMENT

The goal of this task is to develop the FUSION solution with integrated MDMA functionality.

The Recipient shall:

- Prepare and submit a *Fusion Development Plan* that outlines the non-confidential technical roadmap for hardware and software components, including Circuit Pauser specifications, multi-pathway data algorithms, and integration timelines.
- Develop the FUSION hardware components by:
 - Engineering the circuit pauser with accurate and reliable metering ($\pm 1\%$ laboratory/ $\pm 2\%$ field accuracy), GFCI protection, and NEC 625.42 compliance to enable submetering without needing a networked EVSE or panel upgrade.
 - Develop local peer to peer network between current transformer (CT) clamps and circuit pauser for local failsafe mechanisms.
 - Implementing on-device safety features and fail-safe local control mechanisms to maintain safe operation during connectivity disruptions.
 - Implement on device storage per CPUC requirements.
- Establish data validation/integration algorithms and pipeline by:
 - Developing secure data collection pipelines from all measurement pathways (circuit pauser, CT clamps, vehicle telematics, EV Chargers) at 15-minute intervals.
 - Implementing data translation and synchronization to harmonize telematics-derived metrics with other sub-component measurements.
 - Creating standardized data translation/transmission protocols to ensure consistency across vehicle platforms and home setups.
 - Designing and deploying multi-pathway data reconciliation algorithms that cross-validate each data source, dynamically filtering outliers or low-confidence readings to preserve overall accuracy within $\pm 1\%$ (lab) / $\pm 2\%$ (field).
 - Developing authentication systems for secure customer data access and analytics.
 - Improving and developing interfaces/integrations/data analytics dashboards with EVSEs, vehicle telematics, and other energy data.
- Implement a unified submetering and MDMA platform:
 - Implementing robust and secure backend software logic for revenue-grade metering, ensuring each submetering pathway meets CPUC performance thresholds—down-weighting or excluding any data source that cannot achieve the required accuracy.
 - Implementing utility-specific data formatting (e.g., cXML, ESPI, Green Button) and secure data transfer protocols to facilitate data aggregation and billing integration with California investor owned utilities (IOUs).
 - Establishing automated validation and real time dispute/anomaly resolution processes that detect and correct data anomalies per CPUC requirements, including steps for investigation and resolution.
 - Implementing secure encryption and other security measures to protect energy data during transmission and storage. Undergo a third party security review.
 - Design and develop a secure and scalable interface allowing data exchange between utilities, EV service provider, and NeoCharge.

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- Prepare and submit a *MDMA Implementation Strategy* report that details the approach for implementing all CPUC requirements, including data retention, utility formatting, and dispute resolution protocols.
- Prepare and submit a *Technology Integration Test Results* report that documents initial testing of integrated FUSION components and preliminary performance against CPUC accuracy standards.
- Prepare *CPR Report #1* and participate in CPR meeting, in accordance with subtask 1.3 (CPR Meetings)

Products:

- FUSION Development Plan (draft and final)
- MDMA Implementation Strategy (draft and final)
- Technology Integration Test Results
- CPR Report #1

Exhibit A Scope of Work NeoCharge Incorporated

TASK 3: SYSTEM VALIDATION

The goal of this task is to validate FUSION's measurement accuracy against regulatory requirements, establishing compliance with CPUC requirements to enable widespread utility acceptance and validation.

The Recipient shall:

- Prepare and submit a *Validation Testing Plan* that defines the methodology for testing all measurement pathways against CDFA-DMS/National Institute of Standards and Technology (NIST) Handbook 44 standards, including test procedures for multi-pathway reconciliation algorithms and performance assessment across varying environmental conditions.
- Conduct comprehensive measurement validation by:
 - Testing measurement accuracy across all measurement pathways (circuit pauser, CT clamps, vehicle telematics, and EV Chargers) in accordance with CDFA/NIST Handbook 44 test procedures and standards.
 - Documenting accuracy results for CPUC compliance, including the process for identifying and isolating data sources that exceed acceptable error thresholds.
 - Verifying the multi-pathway reconciliation algorithms under various conditions (e.g., partial data, sensor drift, connectivity disruptions) to confirm that final aggregated data remains within $\pm 1\%$ laboratory / $\pm 2\%$ field accuracy.
 - Assessing performance across temperature ranges, load fluctuations, power quality variations, and other realistic scenarios.
 - Identifying pathways for telematics-based submetering to guide future regulatory approvals.
- Prepare and submit a *CPUC Submeter Accuracy Verification Report* that documents measurement accuracy results for all pathways, compliance with CPUC standards, and identifies viable telematics-based submetering approaches for regulatory approval.
- Verify FUSION's integrated MDMA functionality by:
 - Validating billing formats (e.g., cXML, EPSI, Green Button) for PG&E, SCE, and SDG&E, confirming successful data aggregation formats.
- Prepare and submit a *MDMA Functionality Compliance Report* that verifies successful implementation of all CPUC-mandated MDMA functions, including demonstration of utility-compatible data formats and aggregation capabilities for California IOUs.
- Prepare *CPR Report #2* in accordance with subtask 1.3 (CPR Meetings)

Products:

- Validation Testing Plan
- CPUC Submeter Accuracy Verification Report (draft and final)
- MDMA Functionality Compliance Report
- CPR Report #2

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TASK 4: FIELD DEMONSTRATION

The goal of this task is to deploy FUSION systems across a target of 75 residential sites—at least 50% in disadvantaged communities—and measure real-world performance, verifying accuracy, grid interaction, and user benefits.

The Recipient shall:

- Create a *Field Deployment Plan* that includes:
 - Clear site selection criteria focusing on disadvantaged communities in California IOU territories.
 - Standardized installation protocols across various housing and electrical configurations.
 - Data-collection methods for real-world validation of multi-pathway accuracy and grid benefits.
 - Community outreach and engagement strategies to maximize equitable participation.
- Deploy FUSION systems by:
 - Installing units at residential sites, ensuring at least 50% are in disadvantaged communities, excluding ineligible customers (e.g., NEM customers) per CPUC requirements.
 - Utilizing EVITP-certified electricians for all installations
 - Documenting costs, time, and technical variations across different site conditions.
 - Enabling participation in EV-specific rates and integrating each site into utility DR programs and grid services as applicable.
- Monitor System Performance by:
 - Collecting data from the circuit pauser, CT clamp Meter, EV Charger, and vehicle telematics pathways.
 - Periodically testing the reconciliation engine under actual operating conditions to confirm final aggregated data remains within $\pm 2\%$ accuracy in the field.
 - Documenting any data discrepancies or events triggering fallback logic, along with how they were resolved.
 - Serving as MDMA by securely transmitting the aggregated, validated submeter data to utilities for billing purposes.
 - Testing secure data transmission between measurement sources and utility systems, for end-to-end data transfer.
 - Surveying participants on user experience, system reliability, and bill impacts.
- *Prepare a Field Demonstration Report* that includes but is not limited to:
 - Deployment summary, with demographics and installation details.
 - A list of EVITP certification numbers with names of each EVITP-certified electrician that installed electric vehicle charging infrastructure or equipment.
 - Economic benefit analysis (bill savings, avoided infrastructure costs) and evaluation of how multi-pathway data reconciliation impacted overall system accuracy and reliability in the field.
 - Grid impact assessment (peak-load shifting, on-peak vs off-peak energy usage) with logs demonstrating consistent accuracy.
 - Analysis of FUSION's performance as an integrated submeter-MDMA solution, including assessment of data transmission reliability and disputes.

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Products:

- Field Deployment Plan
- Field Demonstration 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 \(www.energizeinnovation.fund\)](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

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TASK 6: TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES

The goal of this task is to conduct activities that will accelerate the commercial adoption of the technology being supported under this agreement. Eligible activities include, but are not limited to, the following:

- Scale-up analysis including manufacturing analysis, independent design verification, and process improvement efforts.
- Technology verification testing, or application to a test bed program located in California.
- Legal services or licensing to secure necessary intellectual property to further develop the technology
- Market research, business plan development, and cost-performance modeling.
- Entry into an incubator or accelerator program located in California.

The Recipient Shall:

- Develop and submit a *Technology Transfer Plan* that identifies the proposed activities the recipient will conduct to accelerate the successful commercial adoption of the technology.
- Present the draft *Technology Transfer Plan* to the TAC for feedback and comments.
- Develop and submit a *Summary of TAC Comments* that summarizes comments received from the TAC members on the Draft Technology Transfer 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 an explanation why.
- Submit the final *Technology Transfer Plan* to the CAM for approval.
- Implement activities identified in final *Technology Transfer Plan*.
- Develop and submit a *Technology Transfer Summary Report* that includes high level summaries of the activities, results, and lessons learned of tasks performed relating to implementing the Final Technology Transfer Plan. This report should not include any proprietary information.
- When directed by the CAM, develop presentation materials for an CEC- sponsored conference/workshop(s) on the project.
- When directed by the CAM, participate in annual EPIC symposium(s) sponsored by the 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:

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

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.