



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
October 08, 2025 Business Meeting
Backup Materials for SolarAPP Foundation**

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: 25-1008-XX

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: SolarAPP Foundation

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-25-031 with the SolarAPP Foundation for a \$3,999,937 grant. This project will expand the existing SolarAPP+ platform's capabilities to include virtual inspections for solar, storage, and residential Electric Vehicle Supply Equipment (EVSE). These enhancements will automate permitting processes, integrate artificial intelligence-supported virtual inspection tools, and streamline utility coordination to drive down costs and expand equitable clean energy access to underserved and disadvantaged communities across California; 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 October 08, 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-25-031

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Ayat Osman
3. MS-:None
4. Phone Number: 916-909-2558

C. Recipient's Information

1. Recipient's Legal Name: SolarAPP Foundation
2. Federal ID Number: 86-3112004

D. Title of Project

Title of project: SolarAPP+ Expansion: Integrating Solar and Storage Virtual Inspections and Automating Residential EV Charger Permitting and Plan Review

E. Term and Amount

1. Start Date: 10/27/2025
2. End Date: 3/31/2030
3. Amount: \$3,999,937.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 10/8/2025.
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Ayat Osman, Ph.D.
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: Electric Program Investment Charge (EPIC)

Agenda Item Subject and Description:

SolarAPP Foundation. Proposed resolution approving agreement EPC-25-031 with the SolarAPP Foundation for a \$3,999,937 grant, and adopting staff's recommendation that this action is exempt from CEQA. This project will expand the existing SolarAPP+ platform's capabilities to include virtual inspections for solar, storage, and residential Electric Vehicle Supply Equipment (EVSE). These enhancements will automate permitting processes, integrate artificial intelligence-supported virtual inspection tools, and streamline utility coordination to drive down costs and expand equitable clean energy access to underserved and disadvantaged communities across California. (EPIC funding) Contact: Ayat Osman, Ph.D. (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, § 15306;

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

No

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

The SolarAPP+ platform expansion is categorically exempt per Cal. Code Regs., tit. 14, § 15306. The project focuses on developing and piloting digital tools for virtual inspections and residential EV permitting, which are software-based solutions designed to streamline permitting processes for clean energy projects within the timeframes specified in this BRIDGE 2024 solicitation (see Section I.I).

b) Agreement **IS NOT** exempt.

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

Yes or 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



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

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
National Renewable Energy Laboratory (NREL)- Managed by Alliance for Sustainable Energy, LLC.	\$ 500,000	\$0

J. Vendors and Sellers for Equipment and Materials/Miscellaneous

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

Vendor/Seller Legal Company Name	CEC Funds	Match Funds
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	24-25	301.001L	\$ 3,999,937

TOTAL Amount: \$ 3,999,937

R&D Program Area: TIEB: EDMF



Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: 101

M. Recipient's Contact Information

3. Recipient's Administrator/Officer

Name: Matthew McAllister

Address: 429 Sycamore St

City, State, Zip: San Carlos, CA 94070-2019

Phone: 303-956-0100

E-Mail: matthew@solarappfoundation.org

1. Recipient's Project Manager

Name: Natalie Bergstrasser

Address: 429 Sycamore St

City, State, Zip: San Carlos, CA 94070-2019

Phone: 918-290-0642

E-Mail: natalie.bergstrasser@gmail.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-23-318
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



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: Ayat Osman

Approval Date: 08/27/2025

Branch Manager: Anthony Ng

Approval Date: 08/29/2025

Director: Anthony Ng for Jonah Steinbuck

Approval Date: 08/29/2025

Exhibit A Scope of Work SolarAPP Foundation

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR ¹	Task Name
1		General Project Tasks
2		Develop Virtual Inspection Tools
3		Pilot Virtual Inspection Tools
4	X	Stakeholder Collaboration and Utility Integration
5		Develop Residential EVSE Permitting and Plan Review Tools
6		Pilot Residential EVSE Permitting and Plan Review Tools
7		Evaluation of Project Benefits
8		Technology/Knowledge Transfer Activities

B. Acronym/Term List

Acronym/Term	Meaning
BRIDGE	Bringing Rapid Innovation Development to Green Energy
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
DAC	Disadvantaged Community
EPIC	Electric Program Investment Charge
ESR	Electrical Service Requirements; Guidance pertaining to electrical service connections with the purpose of assisting members of the workforce who are involved in the installation of electrical service wiring and equipment.
EV	Electric Vehicle
EVSE	Electric Vehicle Supply Equipment
IOU	Investor-Owned Utility
L1	Level 1 Electric Vehicle Charger
L2	Level 2 Electric Vehicle Charger
NFPA	National Fire Protection Association
TAC	Technical Advisory Committee
VI	Virtual Inspection
V2H	Vehicle-to-Home

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

SolarAPP Foundation

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

A. Purpose of Agreement

The purpose of this Agreement is to fund the expansion of the SolarAPP+ platform's existing capabilities for automated solar and storage permitting to include 1) virtual inspections for solar, storage, and clean energy and 2) residential Electric Vehicle Supply Equipment (EVSE) permitting and plan review. This project will automate permitting processes, integrate AI-supported virtual inspection tools, and streamline utility coordination, driving down soft costs, accelerating the deployment of residential EVSE infrastructure, and expanding equitable clean energy access to underserved and disadvantaged communities across California.

B. Problem/ Solution Statement

Problem

The inspection and permitting processes for clean energy are complex and fragmented, often involving varying code requirements and separate offices handling permits and inspections within the same jurisdiction. These inefficiencies lead to substantial soft costs, delays, and administrative burdens, creating inconsistent standards for solar, storage, and EVSE installations and hindering the clean energy transition.

Disadvantaged communities (DACs) are disproportionately affected by these barriers, limiting their access to affordable clean energy technologies and sustainability benefits. Long wait times force families to bear the upfront costs longer, delaying the financial savings clean energy provides—an expense many in DACs cannot afford. Traditional inspection processes often require residents to miss work while waiting at home for an inspector, adding further burden. This problem has persisted as the clean energy sector has lacked the comprehensive tools and stakeholder coordination necessary to standardize and automate permitting and inspections across jurisdictions while ensuring affordability and quality.

Addressing this issue now is critical as California seeks to meet its ambitious energy and climate goals, expand clean energy adoption, and provide equitable access to clean energy solutions. Incorporating a dynamic and inclusive test-and-learn approach can address these challenges by aligning policy, technology, and operational delivery. SolarAPP+ is uniquely positioned to respond to these challenges by expanding its existing successful solar permitting and plan review platform to provide a comprehensive set of tools that streamline permitting and inspection processes while continuing to foster collaboration with local governments, compliance bodies, and utilities to ensure affordable, equitable access to clean energy solutions.

Solution

The SolarAPP+ expansion project will expand the platform's current capabilities for automated solar and storage permitting to include 1) virtual inspections for solar, storage, and clean energy and 2) residential Electric Vehicle Supply Equipment (EVSE) permitting and plan review.

Virtual Inspection

The virtual inspection tools for solar, storage, and future clean energy products will enhance review efficiency for solar, storage, and clean energy installations. This will allow for the integration of permitting and virtual inspections using AI-supported digital tools and standardized

Exhibit A Scope of Work SolarAPP Foundation

checklists, enabling remote, asynchronous processes and saving taxpayers and jurisdictions time and money.

Automated Permitting and Plan Review for Residential EVSE

The automated permitting and plan review tools for residential EVSE will accelerate the deployment of EVSE in line with the State's 2035 goals. This will include the development of multiple pathways to provide instant and automated permitting and plan review for residential L1 and L2 EVSE with a clear and consistent interface for jurisdictions across the State.

No existing platform integrates AI-supported automation technology with the ability to collaborate and align with local governments, safety compliance standards, and utilities in order to scale solutions. The Recipient will develop and pilot these tools through iteratively refining processes, collaborating across stakeholder groups, and focusing on outcomes to further equitable access to clean energy solutions.

The SolarAPP+ expansion project will streamline permitting and inspections, reducing costs, enhancing safety, and improving access to clean energy while delivering benefits such as lower greenhouse gas and criteria air pollutant emissions and greater energy resilience.

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

1. **Develop and Pilot Virtual Inspection Tools:** Create National Fire Protection Association (NFPA) 915-compliant workflows for remote inspections, enabling faster, more reliable review processes for solar and clean energy technologies.
2. **Develop and Pilot Residential EVSE Permitting and Plan Review Tools:** Create automated permitting and plan review tools for residential EVSE, integrating utility requirements, fire code compliance, and bidirectional power transfer support to meet California's growing demand for EV infrastructure.
3. **Increase Access in Disadvantaged Communities:** Prioritize underserved areas to reduce costs, shorten timelines, and expand access to affordable clean energy technologies.
4. **Validate and Disseminate Results:** Measure the cost, time, and environmental benefits of SolarAPP+ using explicit quantifiable metrics, such as avoided carbon dioxide emissions, reductions in criteria pollutants (e.g., NOx), staff hours saved, homeowner time savings, and avoided vehicle miles traveled, and share these results broadly through reports, training, and other dissemination methods to support scalability and nationwide adoption.

Ratepayer Benefits:² This Agreement will result in increased safety, lower costs, and greater electricity reliability.

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).

Exhibit A

Scope of Work

SolarAPP Foundation

Increased Safety

SolarAPP+ virtual inspections will improve safety by eliminating the need for rooftop evaluations and reducing fall risks for installers and inspectors. Manual inspections require dangerous roof climbs or limited visibility from the ground, resulting in less thorough inspections. SolarAPP+ will use AI-supported tools and machine learning to enhance compliance by checking hundreds of parameters against building, fire, and electrical codes, ensuring consistent safety standards and reducing the likelihood of errors. These measures protect both industry professionals and homeowners while streamlining inspection processes and supporting widespread adoption of clean energy technologies.

Lower Costs

SolarAPP+ will significantly reduce costs for IOU ratepayers and jurisdictions through streamlined permitting, plan review, and virtual inspections. Ratepayers will benefit from time and income savings, with ~\$100 saved per project, amounting to ~\$3.9 million annually by Year 3, along with ~157,680 homeowner hours saved from reduced waiting times. By Year 3, expedited solar installations will avoid ~\$4.2 million in energy costs as renewable energy replaces higher-cost fossil fuel energy. Administrative costs for jurisdictions will also drop significantly, with 20,000 staff hours saved annually by Year 3, cutting permitting costs and driving faster deployment of clean energy technologies.

Greater Electricity Reliability

The SolarAPP+ expansion will enhance grid reliability by accelerating the deployment of solar resources and EVSE infrastructure, enabling faster integration of renewable energy into the grid. Virtual inspections will expedite project timelines, enabling 2.1 million kWh of electricity to be interconnected and begin serving customers up to three weeks sooner by the second year, growing to ~25 million kWh annually by the third year. This additional capacity supports 525 MW of distributed solar annually by Year 2 and ~6,100 MW annually by the third year, reducing grid dependence on centralized power and improving resilience during peak demand and extreme weather. Additionally, this project includes Vehicle-to-Home (V2H) compatibility, providing resilience during outages and emergency events while also laying the permitting and inspection foundation for future application of bidirectional technologies.

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 deploying NFPA 915-compliant virtual inspections and automated EVSE permitting to accelerate progress toward 100% clean electricity by 2045 (SB 100), 7.33 million zero-emission vehicles (ZEVs) by 2035 (Executive Order N-79-20), and 2.11 million residential EV chargers by 2035 (AB 2127). SolarAPP+ will support movement toward these goals by leveraging AI-driven tools to reduce permitting delays, reduce costs, and streamline compliance with California's fire, building, and electrical codes. These advancements will expedite solar and EVSE installations by up to three weeks, directly contributing to decarbonization by integrating an additional 6,100 MW of distributed solar capacity by Year 3 and enabling managed EV charging infrastructure to reduce peak demand by 4,300 MW annually.

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 SolarAPP Foundation

Currently adopted in 250 California jurisdictions, including 37% that contain disadvantaged communities (DACs), SolarAPP+ has processed more than 100,000 solar permits nationwide, saving more than 42,000 staff hours and enabling faster, more affordable clean energy deployment. By expanding access and prioritizing DACs, SolarAPP+ aligns with California's climate justice priorities, lowering financial barriers and standardizing permitting processes to ensure equitable access to renewable energy and EV infrastructure. These innovations address critical bottlenecks in clean energy deployment, enabling scalable, efficient, and accessible solutions that accelerate California's transition to a carbon-neutral future while enhancing grid reliability.

Agreement Objectives

The objectives of this Agreement are to:

1. Develop and pilot NFPA 915-compliant processes for virtual inspections to streamline solar and EVSE permitting and plan review processes.
2. Develop and pilot automated residential EVSE permitting and plan review tools with integration of building and fire code compliance, including support for bidirectional power transfer.
3. Engage with a minimum of three California Authorities Having Jurisdiction during the pilot phase. Following the pilot phase, scale deployment to enable at least 3,500 additional Virtual Inspections (solar and storage) and residential EVSE permits by the end of this agreement.
4. Prioritize underserved areas to lower permitting costs, shorten project timelines, and enhance access to clean energy and EVSE technologies.
 - Expand the adoption of SolarAPP++ to include at least 40% DACs or low-income jurisdictions.
 - Increase solar and EVSE project deployments in underserved areas.
5. Measure the benefits of SolarAPP+ expansion and share outcomes to facilitate scalability and national adoption.
 - Publish data on time, cost, and emissions savings to validate project benefits.
 - Share insights with Authority Having Jurisdictions and stakeholders.
 - Demonstrate equity impacts through stakeholder feedback and jurisdiction tracking.

These objectives and metrics will ensure SolarAPP+ addresses California's energy and equity goals by reducing permitting bottlenecks, accelerating clean energy deployment, and increasing accessibility for disadvantaged communities.

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

Exhibit A Scope of Work SolarAPP Foundation

technical tasks should include product(s). Products that require a draft version are indicated by marking “**(draft and final)**” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. With respect to due dates within this Scope of Work, “**days**” means working days.

The Recipient shall:

For products that require a draft version, including the Final Report Outline and Final Report

- Submit all draft products to the CAM for review and comment in accordance with the Project Schedule (Part V). The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt, unless otherwise specified in the task/subtask for which the product is required.
- Consider incorporating all CAM comments into the final product. If the Recipient disagrees with any comment, provide a written response explaining why the comment was not incorporated into the final product.
- Submit the revised product and responses to comments within 10 days of notice by the CAM, unless the CAM specifies a longer time period, or approves a request for additional time.

For products that require a final version only

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

For all products

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

Instructions for Submitting Electronic Files and Developing Software:

○ **Electronic File Format**

- 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.

Exhibit A Scope of Work SolarAPP Foundation

- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5.
- Visual Studio.NET (version 2008 and up). Recommend 2010.
- C# Programming Language with Presentation (UI), Business Object and Data Layers.
- SQL (Structured Query Language).
- Microsoft SQL Server 2008, Stored Procedures. Recommend 2008 R2.
- Microsoft SQL Reporting Services. Recommend 2008 R2.
- XML (external interfaces).

Any exceptions to the Electronic File Format requirements above must be approved in writing by the CAM. The CAM will consult with the CEC's Information Technology Services Branch to determine whether the exceptions are allowable.

MEETINGS

Subtask 1.2 Kick-off Meeting

The goal of this subtask is to establish the lines of communication and procedures for implementing this Agreement.

The Recipient shall:

- Attend a "Kick-off" meeting with the CAM, and other CEC staff relevant to the Agreement. The Recipient's Project Manager and any other individuals deemed necessary by the CAM or the Project Manager shall participate in this meeting. The administrative and technical aspects of the Agreement will be discussed at the meeting. Prior to the meeting, the CAM will provide an agenda to all potential meeting participants. The meeting may take place in person or by electronic conferencing (e.g., Teams, Zoom), with approval of the CAM.

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

- The CAM's expectations for accomplishing tasks described in the Scope of Work;
 - An updated Project Schedule;
 - Terms and conditions of the Agreement;
 - Invoicing and auditing procedures;
 - Travel;
 - Equipment purchases;
 - Administrative and Technical products (subtask 1.1);
 - CPR meetings (subtask 1.3);
 - Monthly Calls (subtask 1.5)
 - Quarterly Progress reports (subtask 1.6)
 - Final Report (subtask 1.7)
 - Match funds (subtask 1.8);
 - Permit documentation (subtask 1.9);
 - Subawards(subtask 1.10);
 - Technical Advisory Committee meetings (subtasks 1.11 and 1.12);
 - Agreement changes;
 - Performance Evaluations; and
 - Any other relevant topics.
- Provide *Kick-off Meeting Presentation* to include but not limited to:

Exhibit A Scope of Work SolarAPP Foundation

- Project overview (i.e. project description, goals and objectives, technical tasks, expected benefits, etc.)
- Project schedule that identifies milestones
- List of potential risk factors and hurdles, and mitigation strategy
- Provide an *Updated Project Schedule*, *Match Funds Status Letter*, and *Permit Status Letter*, as needed to reflect any changes in the documents.

The CAM shall:

- Designate the date and location of the meeting.
- Send the Recipient a *Kick-off Meeting Agenda*.

Recipient Products:

- Kick-off Meeting Presentation
- Updated Project Schedule (*if applicable*)
- Match Funds Status Letter (subtask 1.7) (*if applicable*)
- Permit Status Letter (subtask 1.8) (*if applicable*)

CAM Product:

- Kick-off Meeting Agenda

Subtask 1.3 Critical Project Review (CPR) Meetings

The goal of this subtask is to determine if the project should continue to receive CEC funding, and if so whether any modifications must be made to the tasks, products, schedule, or budget. CPR meetings provide the opportunity for frank discussions between the CEC and the Recipient. As determined by the CAM, discussions may include project status, challenges, successes, advisory group findings and recommendations, final report preparation, and progress on technical transfer and production readiness activities (if applicable). Participants will include the CAM and the Recipient and may include the CAO and any other individuals selected by the CAM to provide support to the CEC.

CPR meetings generally take place at key, predetermined points in the Agreement, as determined by the CAM and as shown in the Task List on page 1 of this Exhibit. However, the CAM may schedule additional CPR meetings as necessary. The budget may be reallocated to cover the additional costs borne by the Recipient, but the overall Agreement amount will not increase. CPR meetings generally take place at the CEC, but they may take place at another location, or may be conducted via electronic conferencing (e.g., WebEx) as determined by the CAM.

The Recipient shall:

- 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.

Exhibit A Scope of Work SolarAPP Foundation

- Send the Recipient a *CPR Agenda* with a list of expected CPR participants in advance of the CPR meeting. If applicable, the agenda may include a discussion of match funding and permits.
- Conduct and make a record of each CPR meeting. Provide the Recipient with a schedule for providing a Progress Determination on continuation of the project.
- Determine whether to continue the project, and if so whether modifications are needed to the tasks, schedule, products, or budget for the remainder of the Agreement. A determination of unsatisfactory progress This may result in project delays, including a potential Stop Work Order, while the CEC determines whether the project should continue.
- Provide the Recipient with a *Progress Determination* on continuation of the project, in accordance with the schedule. The Progress Determination may include a requirement that the Recipient revise one or more products.

Recipient Products:

- CPR Report(s)

CAM Products:

- CPR Agenda(s)
- Progress Determination

Subtask 1.4 Final Meeting

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

The Recipient shall:

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

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

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

Exhibit A Scope of Work SolarAPP Foundation

- Prepare a *Final Meeting Agreement Summary* that documents any agreement made between the Recipient and Commission staff during the meeting.
- Prepare a *Schedule for Completing Agreement Closeout Activities*.
- Provide copies of *All Final Products* organized by the tasks in the Agreement.

Products:

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

MONTHLY CALLS, REPORTS AND INVOICES

Subtask 1.5 Monthly Calls

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

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

The CAM shall:

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

The Recipient shall:

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

Product:

- Email to CAM concurring with call summary notes.

Subtask 1.6 Quarterly Progress Reports and Invoices

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

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:

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<https://www.energy.ca.gov/media/4691>

- Submit a monthly or quarterly *Invoice* on the invoice template(s) provided by the CAM.

Recipient Products:

- Quarterly Progress Reports
- Invoices

CAM Product:

- Invoice template

Subtask 1.7 Final Report

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

Subtask 1.7.1 Final Report Outline

The Recipient shall:

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

Recipient Products:

- Final Report Outline (draft and final)

CAM Products:

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

Subtask 1.7.2 Final Report

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.)

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- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)
- Submit a draft of the Executive Summary to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments on Draft Final Report* received on the Executive Summary. For each comment received, the Recipient will identify in the summary the following:
 - Comments the Recipient proposes to incorporate.
 - Comments the Recipient does propose to incorporate and an explanation for why.
- Submit a draft of the report to the CAM for review and comment. The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt.
- Incorporate all CAM comments into the *Final Report*. If the Recipient disagrees with any comment, provide a *Written Responses to Comments* explaining why the comments were not incorporated into the final product.
- Submit the revised Final Report electronically with any Written Responses to Comments within 10 days of receipt of CAM's Written Comments on the Draft Final Report, unless the CAM specifies a longer time period or approves a request for additional time.

Products:

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

CAM Product:

- Written Comments on the Draft Final Report

MATCH FUNDS, PERMITS, AND SUBAWARDS

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.

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

Products:

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

Subtask 1.9 Permits

The goal of this subtask is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track. Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement, with the exception of costs incurred by University of California recipients. 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*.

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- 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 and execute subrecipients and site host agreements, as applicable, required to carry out the tasks under this Agreement; and (2) ensure that the subrecipients and site host agreements are consistent with the Agreement terms and conditions and the Recipient's own contracting policies and procedures.

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 site 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 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.
- 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:

- Subaward 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*)

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,

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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.

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.

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- 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* for each TAC Meeting 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 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

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Subtask 1.13 Project Performance Metrics

The goal of this subtask is to finalize key performance targets for the project based on feedback from the TAC and report on final results in achieving those targets. The performance targets should be a combination of scientific, engineering, techno-economic, and/or programmatic metrics that provide the most significant indicator of the research or technology's potential success.

The Recipient shall:

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

Products:

- TAC Performance Metrics Summary
- Project Performance Metrics Results

IV. TECHNICAL TASKS

TASK 2 DEVELOP VIRTUAL INSPECTION TOOLS

The goals of this task are to develop NFPA 915-compliant virtual inspection tools to streamline the review process for solar installations and other clean energy technologies. These tools will enable remote and asynchronous assessments using video and photo documentation, reducing permitting delays and associated costs.

The Recipient shall:

- Design Virtual Inspection Framework: Develop a framework for NFPA 915-compliant virtual inspections, detailing technical specifications for video and photo documentation workflows, in consultation with jurisdiction officials.
- Develop Inspection Tools Prototype: Design and build prototype virtual inspection tools incorporating standardized workflows and remote access capabilities.
- Prepare and submit a *Virtual Inspection Framework and Prototype Report* summarizing the design framework and prototype including the technical requirements, specifications, and compliance guidelines for virtual inspection tools, as well as a description of the features, functionality, and user interface of the prototype tools. This report should not disclose any confidential information.

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Products:

- Virtual Inspection Framework and Prototype Report

TASK 3 PILOT VIRTUAL INSPECTION TOOLS

The goal of this task is to pilot and test the virtual inspection tools in selected jurisdictions to enhance efficiency, improve safety compliance, and reduce travel-related emissions.

The Recipient shall:

- Conduct Virtual Inspection Pilot: Execute pilot tests of the virtual inspection tools in selected jurisdictions, gathering data on performance, user experience, and regulatory compliance.
- Release the Virtual Inspection Tools for broader application in Solar / Energy Storage: Modify the virtual inspection tools based on pilot test findings and release to all SolarAPP+ customers.
- Prepare and submit a *Pilot Virtual Inspection Tools Report* detailing pilot design, planning, implementation, jurisdiction selection (targeted vs. actual), measurement protocols, performance metrics, user feedback, results and findings, challenges and resolutions, and any necessary modifications. This report should not disclose any confidential information.

Products:

- Pilot Virtual Inspection Tools Report

TASK 4 STAKEHOLDER COLLABORATION AND UTILITY INTEGRATION

The goal of this task is to foster collaboration among stakeholders, including municipalities, industry representatives, and utilities to streamline permitting and plan review processes for clean energy projects. The aim of this collaboration is to discuss challenges and solutions for permitting and plan review processes. Also, partnering with utilities could streamline interconnection processes by aligning workflows with Electric Service Requirements (ESR) and ensuring compatibility with SolarAPP+ tools. The task aims to reduce regulatory bottlenecks by standardizing permitting and interconnection processes, aligning them with utility and code requirements to create a clear framework for scalable deployment of solar installations and residential EVSE.

The Recipient shall:

- Prepare and Submit a *Stakeholder Engagement Plan*: Develop a plan outlining objectives, strategies, expected outcomes, and timelines for ongoing stakeholder collaboration and utility engagement.
- Engage Stakeholders and Utilities to gather input, present solutions, and refine strategies for scalable permitting and plan review processes.
- Prepare and Submit a *Stakeholder Engagement Summary Report* detailing the outcomes of stakeholder collaboration.
- Prepare *CPR Report #1*, per subtask 1.3.
- Participate in a CPR meeting per subtask 1.3

Products:

- Stakeholder Engagement Plan
- Stakeholder Engagement Summary Report

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- CPR Report #1

TASK 5 DEVELOP RESIDENTIAL EVSE PERMITTING AND PLAN REVIEW TOOLS

The goals of this task are to develop new and additional capabilities of the SolarAPP+ platform to include automated permitting and plan review tools for residential EVSE. These tools will include automated workflows for plan review and compliance checks (covering utility Electrical Service Requirements (ESR), fire codes, and bidirectional power transfer).

This task aims to reduce permitting costs, improve compliance consistency, and accelerate EV infrastructure deployment. It does so by addressing utility interconnection requirements and code compliance to create scalable, standardized processes for jurisdictions to manage increased EVSE demand.

The Recipient shall:

- Develop Residential EV Permitting and Plan Review Tools: Create automated workflows for residential EVSE permitting, including automated plan review, compliance checks for utility Electrical Service Requirements (ESR), fire codes, and bidirectional power transfer capabilities.
- Prepare and submit a *Residential EV Permitting and Plan Review Tools Framework and Prototype Report* summarizing the design framework, functionality, processes, and compliance features of the residential EV permitting and plan review tools.

Products:

- Residential EV Permitting and Plan Review Tools Framework and Prototype Report

TASK 6 PILOT RESIDENTIAL EVSE PERMITTING AND PLAN REVIEW TOOLS

The goal of this task is to pilot and test the automated residential EVSE permitting and plan review tools in selected jurisdictions to ensure usability, compliance, and scalability for broader deployment.

This task aims to validate the tools' performance, measure costs and time savings, and gather stakeholder feedback to refine the tools for future applications.

The Recipient shall:

- Pilot Residential EV Permitting and Plan Review Tools: Test automated permitting and plan review tools in selected jurisdictions, collecting data on approval timelines, cost savings, and user feedback.
- Prepare and submit a *Pilot Residential EV Permitting and Plan Review Tools Report* summarizing design, planning approach, jurisdiction selection (targeted vs. actual), implementation, measurement protocols, performance metrics, user feedback, results, challenges, resolutions, and any necessary modifications.

Products:

- Pilot Residential EV Permitting and Plan Review Tools Report

TASK 7 EVALUATION OF PROJECT BENEFITS

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

The Recipient shall:

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

Products:

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

TASK 8 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.

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- 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.
- 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(s) at the project sites or related project photographs.

Products:

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

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.