



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
October 08, 2025 Business Meeting
Backup Materials for City of Anaheim Public Utilities**

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: City of Anaheim Public Utilities

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 CER-25-003 with City of Anaheim Public Utilities for a \$7,453,938 grant. The project will deploy grid infrastructure upgrades to support modernization of Anaheim's aging grid infrastructure by replacing outdated, unreliable distribution switch equipment with modern switches that support automation for reducing the frequency and duration of outages. This modern switch technology will also retire the use of obsolete sulfur hexafluoride gas; 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: CER-25-003

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Alana Webre
3. MS-:None
4. Phone Number: 916-232-8173

C. Recipient's Information

1. Recipient's Legal Name: City of Anaheim Public Utilities
2. Federal ID Number: xx-xxxxxxx

D. Title of Project

Title of project: Distribution Switch Reliability and Automation Upgrades

E. Term and Amount

1. Start Date: 11/10/2025
2. End Date: 3/31/2029
3. Amount: \$7,453,938.00

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: Alana Webre
5. Time Needed for Business Meeting: 10 minutes.
6. The email subscription topic is: Community Energy Reliability and Resilience Investment (CERRI) Program.

Agenda Item Subject and Description:

City Of Anaheim Public Utilities. Proposed resolution approving agreement CER-25-003 with City of Anaheim Public Utilities for a \$7,453,938 grant, and adopting staff's recommendation that this project is exempt from CEQA. The project will deploy grid infrastructure upgrades to support modernization of Anaheim's aging grid infrastructure by replacing outdated, unreliable distribution switch equipment with modern switches that support automation for reducing the frequency and duration of outages. This modern switch technology will also retire the use of obsolete sulfur hexafluoride gas. (CERRI funding) Contact: Alana Webre



G. California Environmental Quality Act (CEQA) Compliance

1. Is Agreement considered a “Project” under CEQA?

Yes

If yes, skip to question 2.-

If no, complete the following (PRC 21065 and 14 CCR 15378) and explain why Agreement is not considered a “Project”:

Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because:

2. If Agreement is considered a “Project” under CEQA answer the following questions.

a) Agreement **IS** exempt?

Yes

Statutory Exemption?

No

If yes, list PRC and/or CCR section number(s) and separate each with a comma. If no, enter “None” and go to the next question.

PRC section number: None

CCR section number: None

Categorical Exemption?

Yes

If yes, list CCR section number(s) and separate each with a comma. If no, enter “None” and go to the next question.

CCR section number: Cal. Code Regs., tit. 14, § 15301;

Cal. Code Regs., tit. 14, § 15302

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., title 14, Section 15302 provides that replacement or reconstruction of existing structures and facilities where the new structure is to be located on the same site for no substantial expansion of purpose and capacity are categorically exempt from CEQA. The project will replace 40 units of existing electrical switches with modern equivalent equipment at the same locations as the original switches, and integrate them with automation technology. There will be no activities that cause environmental disturbance during the installation of the switch replacements. For these reasons, the project will not have a significant effect on the environment and falls under the categorical exemption listed in 14 CCR § 15302.



Additionally, Cal Code Regs title 14, Section 15301 provides that the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing structures, facilities, mechanical equipment or topographical features involving negligible or no expansion of use beyond that existing are categorically exempt from the provisions of CEQA. This project will involve minor alteration of existing facilities by installing new switches and automation technology in place of outdated equipment to reduce outage frequency and duration, but involves no expansion of use. The project will not have a significant impact on local air quality, noise, or traffic. For these reasons, the project will not have a significant effect on the environment and falls under the categorical exemption listed in 14 C.C.R. § 15301.

The project will not impact an environmental resource of hazardous or critical concern where designated, precisely mapped, and officially adopted pursuant to law by federal, state, or local agencies; does not involve any cumulative impacts of successive projects of the same type in the same place that might be considered significant; does not involve unusual circumstances that might have a significant effect on the environment; will not result in damage to scenic resources within a highway officially designated as a state scenic highway; the project site is not included on any list compiled pursuant to Government Code section 65962.5; and the project will not cause a substantial adverse change in the significance of a historical resource. Therefore, none of the exceptions to categorical exemptions listed in CEQA Guidelines section 15300.2 apply to this project and this project will not have a significant effect on the environment.

b) Agreement **IS NOT** exempt.

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

No

If yes, answer yes or no to all that applies. If no, list all as “no” and “None” as “yes”.

Additional Documents	Applies
Initial Study	No
Negative Declaration	No
Mitigated Negative Declaration	No
Environmental Impact Report	No
Statement of Overriding Considerations	No
None	Yes

H. Is this project considered “Infrastructure”?

Yes



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
TBD - Design Consultant Subcontractor	\$ 15,000	\$585,000
TBD - APU High-Voltage Prequalified Subcontractor	\$ 85,000	\$2,265,000
Love Anaheim (Community Based Organization)	\$ 0	\$30,000
JATC Subcontractor	\$ 0	\$30,000

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
	\$	\$

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
Love Anaheim

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
FED	23-24	303.113	\$ 7,453,938.00

TOTAL Amount: \$7,453,938.00

R&D Program Area: ESB: Renewables

Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: 0002736



M. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Fred Barvarz

Address: 201 S. Anaheim Blvd., Suite 701

City, State, Zip: Anaheim, CA, 92805

Phone: 714-765-4191

E-Mail: fbarvarz@anaheim.net

2. Recipient's Project Manager

Name: Vinh Tran

Address: 201 S. Anaheim Blvd., Suite 701

City, State, Zip: Anaheim, CA, 92805

Phone: 714-765-4273

E-Mail: vtran@anaheim.net

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-23-312
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	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:

Approval Date:

Branch Manager:

Approval Date:

Director:

Approval Date:

Exhibit A Scope of Work

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	CPR ¹	Task Name
1		General Project Tasks
2		Field Assessment and Design Preparation
3		Community Engagement and Impacts
4	X	Workforce Development
5	X	Contractor Procurement and Coordination
6	X	Equipment Installation, Testing, and Commissioning
7		Evaluation of Project Benefits

B. Acronym/Term List

Acronym/Term	Meaning
AWDB	Anaheim Workforce Development Board
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CBO	Community-Based Organization
CBA	Collective Bargaining Agreement: Also referred to as “bargaining agreement” and sometimes known as a “labor-management agreement” or “union contract.” These terms refer to an agreement between an employer and a union establishing wages, hours, and other terms and conditions of employment for employees in the bargaining unit represented by the union.
CEC	California Energy Commission
CERRI	Community Energy Reliability and Resilience Investment (CERRI) Program
Contractor	A legal entity contracted by the prime or subrecipient to provide goods and/or services within normal business operations, provides similar goods or services to many different purchasers, operates in a competitive environment, provides goods or services that are ancillary to the operation of the CERRI Program.
CPR	Critical Project Review
CSUF	California State University of Fullerton
DAC	These are communities designated pursuant to Health and Safety Code section 39711 as representing the top 25 percent scoring census tracts from CalEnviroScreen 4.0, federally recognized tribal areas, and census tracts with especially high pollution but insufficient data to derive a complete score. (https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-40)
DBA	Davis-Bacon Act
DOE	U.S. Department of Energy
DOL	U.S. Department of Labor
IBEW	International Brotherhood of Electrical Workers

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

JATC	Joint Apprenticeship and Training Committee
LCPtracker	As a requirement of the Davis-Bacon Act (DBA), award recipients must submit weekly, certified payrolls to the DOE. This ensures that employers are in compliance with the law by paying applicable workers the required prevailing wage and benefits on a weekly basis. The DOE has contracted with LCPtracker, a third-party software application, to manage tracking and submission of payrolls to comply with the DBA.
OMS	Outage Management System
PMV	Pad-Mounted Vacuum
Recipient	Anaheim Public Utilities
SCADA	Supervisory Control and Data Acquisition
WD	Wage Determination: A WD is the list of basic hourly wage rates and fringe benefit rates for each classification of laborers and mechanics ("labor classification") in a predetermined geographic area for a particular type of construction, as established by the U.S. Department of Labor (DOL) Wage and Hour Division. The WD identifies the specific information to be loaded into LCPtracker for a particular project. In some cases, the WD is known at award and in others at a later time. In cases where there is a CBA or a WD is not available in SAM.gov, a separate process exists via Office of General Counsel (OGC)/DOL for conformance/conversion to a specific WD for the project/prime (DOE Bipartisan Infrastructure Law DBA guidance on conformance is forthcoming). Note that this process can take up to 60 days.

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

A. Purpose of Agreement

The purpose of this Agreement is to fund the replacement of 20 to 40 pad-mounted vacuum (PMV) switches with those equipped with advanced automation technology and integrate them with the Recipient's existing infrastructure, including Anaheim's state-of-the-art outage management system (OMS) and supervisory control and data acquisition (SCADA) system.

B. Problem/ Solution Statement

Problem

The proposed project will enhance the reliability and resiliency of the Recipient's electric grid infrastructure serving the Anaheim neighborhoods, businesses, and critical loads. The current method of dispatching a crew to locate and manually isolate a failure is time-consuming and can delay the restoration of power for affected residents, businesses, and critical services. Also, by replacing the old switches with a new type that utilizes solid dielectric technology, the current use of over 700 pounds of sulfur hexafluoride (SF6) will be eliminated. The Community Energy Reliability and Resilience Investment (CERRI) grant will enable timely investment for the distribution system's long-term reliability and resilience while removing a harmful gas from the system.

The 20 to 40 distribution system switches that will be replaced are obsolete and their use of SF6 gas is being phased out through regulatory requirements. Anaheim Public Utilities has embraced the use of state-of-the-art solid dielectric switches to replace its underground SF6 gas switches. With the solid dielectric technology available now for surface-mounted switches, the Recipient is expanding the use of solid dielectric switches to replace its surface-mounted

Exhibit A

Scope of Work

SF6 switches with new switches that also include integrated automation for improved reliability.

Solution

The project closely aligns with the CERRI Program's goals by bolstering the Recipient's electrical grid's resilience, reliability, and efficiency. The Recipient will address present and future challenges through investments in modernization and advanced technologies, ensuring a more resilient and sustainable energy future for its community. Specifically, the project will improve grid resilience by replacing 20 to 40 PMV switches that are obsolete and 20+ years old. The new switches are equipped with automation technology, which can isolate failures remotely and restore power quickly in case of outages. This strengthens the grid's resilience to disruptions from extreme weather events, natural disasters, and unforeseen circumstances, minimizing outage durations and enhancing service quality for residents and businesses.

The project will enhance grid monitoring and control by integrating with the Recipient's OMS and SCADA systems. This facilitates real-time monitoring and control of the electrical infrastructure, enabling quicker remote detection and response to outages, ultimately improving system reliability and operational efficiency. Moreover, the project will optimize grid operations, reduce maintenance costs, and enhance the integration of new energy resources through cutting-edge automation and monitoring solutions. By employing advanced technologies, the Recipient will improve grid efficiency and performance, contributing to a more reliable and resilient energy infrastructure.

By leveraging partnerships with educational institutions and workforce development agencies, the project will provide training opportunities for interns, apprentices, and existing staff members, ensuring a skilled workforce capable of effectively implementing and maintaining the upgraded infrastructure. This emphasis on workforce development aligns with the broader goals of the CERRI Program to foster economic growth, job creation, and community engagement.

The project will incorporate measures to ensure that residents and businesses across the service area benefit from improved grid reliability and reduced outage impacts. This approach underscores the project's alignment with the overarching objectives of the CERRI Program to enhance energy reliability and access for all communities.

C. Goals and Objectives of the Agreement

Agreement Goals: The goals of this Agreement are to:

- Enhance the reliability and resilience of Anaheim's electrical grid.
- Improve grid monitoring and control capabilities.
- Optimize grid operations for increased efficiency and performance.
- Enhance service quality for residents and businesses.
- Ensure a sustainable and resilient energy future for the community.
- Support California's clean energy policies by improving infrastructure resilience.
- Eliminate over 700 pounds of SF6, a greenhouse gas 32,500 [times](#) more potent than carbon dioxide (CO2) in contributing to global warming, from the operation of the switches.

Community Benefits: This Agreement will result in the community benefits of enhanced electrical grid reliability and resilience, improved service quality for residents and businesses,

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and a more reliable energy future for the community. By integrating advanced automation technology with the existing infrastructure, the project will strengthen the grid's ability to withstand disruptions caused by extreme weather events and other unforeseen circumstances. This will lead to fewer and shorter power outages, minimizing disruptions to daily life and business operations.

Additionally, the project will enhance the Recipient's ability to monitor and control the electrical grid in real time, facilitating quicker detection and response to outages. This improved grid management will optimize operations, reduce maintenance costs, and contribute to a more efficient and durable energy infrastructure. Overall, these community benefits will contribute to a higher quality of life for Anaheim residents and support the economic growth and development of the city.

Workforce Development: This project will create workforce development benefits by providing training opportunities and employment pathways for residents, interns, and apprentices. The project will offer training programs and hands-on experience in electrical engineering, grid operations, and automation technology through partnerships with educational institutions and workforce development agencies. Additionally, the project will provide access to career-track training and employment opportunities in the utility industry.

These workforce development activities will equip individuals with valuable skills and knowledge and contribute to the long-term durability of the utility industry and local workforce. By investing in training and development, the project will create a skilled workforce capable of maintaining and operating the modernized electrical grid infrastructure. This will support economic growth, job creation, and community empowerment, ensuring a brighter future for the workforce and the city.

Agreement Objectives:

Community Engagement Metrics:

- Community Input: The Recipient aims to enhance community participation in project planning and decision-making processes, as measured by attendance at community meetings, survey completion, and feedback received.
- Community-Based Organization (CBO) Representation: The Recipient will increase community representation in decision-making processes by at least 50%, measured through the percentage of CBO representatives actively involved in project planning meetings, discussions, and decision-making forums compared to the baseline.
- Community Engagement Events: The Recipient and the CBO will aim to have up to **250** attendees at the five Council District meetings and up to **25** survey responses to the Recipient's virtual public survey. The purpose of these community meetings and surveys is to inform and solicit input and feedback from stakeholders and community members who will be impacted by the Project.

Impact Metrics:

- Reduction in outage frequency: The project aims to reduce the frequency of power outages by up to 5% by replacing old (20+ years) switches with new solid dielectric technology, which is more reliable than existing switches that use SF6 gas.
- Reduction in outage duration: The project seeks to minimize the duration of power outages by 60-90 minutes per outage by implementing advanced automation

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technology, upgrading and improving infrastructure, and improving fault detection and response capabilities, ensuring quicker service restoration.

- Number of customers affected by outages: The project seeks to reduce the number of customers impacted by up to 1,000 customers per outage to mitigate disruptions and improve service reliability.
- Reduction in infrastructure damage: The project aims to reduce damage to electrical infrastructure caused by outages or adverse weather events by up to 20%, thereby minimizing repair costs and service disruptions.
- Number of customers who benefitted from improved service reliability: The project aims to quantify its impact on customer satisfaction and service reliability by targeting a reduction in service disruptions experienced by approximately 27,000 customers.

Build Metrics:

- Number of substations receiving other upgrades: The Recipient will strive to increase the number of substations receiving other upgrades, like automation systems or backup power sources, by **50%**, which will further enhance infrastructure resilience and operational efficiency.
- Percentage of system that will migrate into the Recipient's software system (OMS and SCADA systems): The Recipient will target a 100% migration of the system into the OMS and SCADA software systems, indicating substantial progress in grid modernization efforts, enhancing operational efficiency and system reliability.
- Expected lifetime of new equipment (specify equipment in "Type" field): Assessing the expected lifetime of new equipment, such as switches, sensors, and monitoring devices, will ensure that investments yield long-term benefits. Aim for an average expected lifetime of **30** years for the installed infrastructure, contributing to enhanced grid reliability and resilience.

Workforce Development Metrics:

- Expected number of individuals to receive training: The Recipient aims to train approximately 60 individuals, including 4 registered apprenticeships and 4 interns, sponsored by the project. This estimation is based on anticipated demand for skilled labor, training program capacity, and historical training participation rates.
- Expected average number of hours of training per individual: The Recipient anticipates an average of 10 training hours per individual, encompassing formal classroom instruction and on-the-job learning experiences. This estimation includes City employees, 4 registered apprentices, and 4 interns and takes into consideration program duration, intensity, industry standards, and best practices.
- Expected number of individuals who will receive a raise or promotion due to training: The Recipient projects that approximately 5 individuals will receive salary increases or promotions following their participation in project-facilitated training programs. This estimation draws from historical industry career advancement data and anticipates the impact of skill development on individual career trajectories.
- Expected number of individuals placed in new paid positions due to training: The Recipient anticipates placing approximately 5 individuals (4 apprentices and 1 intern) in new paid positions, directly resulting from their training participation. This estimation considers workforce demand projections, job placement rates, and employer partnerships.

Exhibit A Scope of Work

- Amount budgeted for training (dollars): The Recipient has allocated \$30,000 (in-kind) for workforce training initiatives within the project budget. This budget encompasses training program costs, instructor fees, materials, and administrative expenses, ensuring comprehensive support for skill development initiatives.

III. TASK 1 GENERAL PROJECT TASKS

PRODUCTS

Subtask 1.1 Products

The goal of this subtask is to establish the requirements for submitting project products (e.g., reports, summaries, plans, and presentation materials). Unless otherwise specified by the Commission Agreement Manager (CAM), the Recipient must deliver products as required below by the dates listed in the Project Schedule (Part V). All products submitted which will be viewed by the public, must comply with the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973, as amended (29 U.S.C. Sec. 794d), and regulations implementing that act as set forth in Part 1194 of Title 36 of the Federal Code of Regulations. All technical tasks should include product(s). Products that require a draft version are indicated by marking “(draft and final)” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. With respect to due dates within this Scope of Work, “days” means working days.

The Recipient shall:

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

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

For products that require a final version only

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

For all products

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

Instructions for Submitting Electronic Files and Developing Software:

○ **Electronic File Format**

- 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)-

Exhibit A

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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 or any other format approved by the CAM.

- **Software Application Development**

Use the following standard Application Architecture components in compatible versions for any software application development required by this Agreement (e.g., databases, models, modeling tools), unless the CAM approves other software applications such as open-source programs:

- Microsoft ASP.NET framework (version 3.5 and up). Recommend 4.0.
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5.
- Visual Studio.NET (version 2008 and up). Recommend 2010.
- C# Programming Language with Presentation (UI), Business Object and Data Layers.
- SQL (Structured Query Language).
- Microsoft SQL Server 2008, Stored Procedures. Recommend 2008 R2.
- Microsoft SQL Reporting Services. Recommend 2008 R2.
- XML (external interfaces).

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

MEETINGS

Subtask 1.2 Kick-off Meeting

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

The Recipient shall:

- Attend a "Kick-off" meeting with the CAM, the Commission Agreement Officer (CAO), and any other CEC staff relevant to the Agreement. The Recipient will bring its Project Manager and any other individuals designated by the CAM to 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., Microsoft Teams), with approval of the CAM.

The administrative portion of the meeting will include discussion of the following:

- Terms and conditions of the Agreement;

Exhibit A Scope of Work

- Invoicing and auditing procedures;
- Administrative products (subtask 1.1);
- CPR meetings (subtask 1.3);
- Match fund documentation (subtask 1.7);
- Permit documentation (subtask 1.8);
- Subcontracts (subtask 1.9); and
- Any other relevant topics.

The technical portion of the meeting will include discussion of the following:

- The CAM's expectations for accomplishing tasks described in the Scope of Work;
 - An updated Project Schedule;
 - Technical products (subtask 1.1);
 - Progress reports (subtask 1.5);
 - Monthly Call (subtask 1.5.1);
 - Final Report (subtask 1.6);
 - 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)
 - 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, report preparation, and progress on Community Engagement and Workforce Development activities. 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

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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 will 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., Microsoft Teams) as determined by the CAM.

The Recipient shall:

- Prepare and submit a *CPR Report and/or presentation* based on the CAM's determination 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 or presentation 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 will 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. If the CAM concludes that satisfactory progress is not being made, this conclusion will be referred to the Deputy Director of the Energy Research and Development Division.
- 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) and/or Presentation(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, as applicable, project outcomes, 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., Microsoft Teams), with approval of the CAM.

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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 project results and benefits (including Project Metrics as cited in Attachment 09), challenges experienced, 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 and the CAO 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).
 - Any "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* if deemed necessary by the CAM.
- Prepare a *Tangible Personal Property Report (SF-428)* if deemed necessary by the CAM.
- Prepare a *Tangible Personal Property Report Final Report (SF-428-B)* if deemed necessary by the CAM.
- Prepare a *Tangible Personal Property Report Disposition Request/Report (SF-428-C)* if deemed necessary by the CAM.
- Provide copies of *All Final Products* on a USB memory stick, or via a secure File Transfer Protocol (FTP) site, organized by the tasks in the Agreement.

Products:

- Final Meeting Agreement Summary (*if applicable*)
- Schedule for Completing Agreement Closeout Activities (*if applicable*)
- Tangible Personal Property Report (SF-428) (*if applicable*)
- Tangible Personal Property Report Final Report (SF-428-B) (*if applicable*)
- Tangible Personal Property Report Disposition Request/Report (SF-428-C) (*if applicable*)
- All Final Products

MONTHLY CALLS, REPORTS AND INVOICES

Subtask 1.5 Project Management 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:
 - Detail progress made on all Agreement activities as specified in the Scope of Work for the preceding quarter, including baseline budget and incurred cost, milestones (as defined in the Project Schedule, Attachment 04), build metrics, and risk management activities.
 - Be submitted no later than 15 days after the end of the Federal Fiscal Quarter.
- See the progress report instructions and template for the required specifications:
 - Quarterly Progress Report Instructions: <https://www.energy.ca.gov/media/9027>

Exhibit A Scope of Work

- Quarterly Progress Report Template: <https://www.energy.ca.gov/media/9028>
- Submit a monthly or quarterly *Invoice* that follows the instructions in the “Payment of Funds” section of the terms and conditions, including a financial report on Match Funds and in-state expenditures.

Products:

- Quarterly Progress Reports
- Invoices

Subtask 1.5.1 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 1.5.2 Davis-Bacon Act Reporting Compliance

The goal of this subtask is to ensure compliance with federal Davis-Bacon Act (DBA) requirements. Bipartisan Infrastructure Law (BIL) Title XI, Section 41101, applies wage rate requirements under DBA for construction, alteration, or repair work on Bipartisan Infrastructure Law (BIL) activities. This means that laborers and mechanics performing construction, alternation or repair on BIL projects shall be paid wages at the rates not less than those prevailing on similar projects in the locality as determined by the Secretary of Labor. In the case of a multi-phase project, DBA and associated compliance activities would not be triggered until the start of construction. Please review the Bipartisan Infrastructure Law Davis-Bacon Act Compliance Using LCPtracker with Monitoring and Reporting Guidance for BIL DBA Funding Recipients².

² https://www.energy.gov/sites/default/files/2024-02/BIL%20DBA%20Compliance%20using%20LCPtracker%20-%20External%20Guidance%20Final_0.pdf) for more information

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The Recipient shall:

- Submit proposed Wage Determination(s) (WD) or Collective Bargaining Agreement(s) (CBA) for input into the LCPtracker for all subrecipients and contractors (including vendors) to the Department of Energy (DOE) Technical Project Officer (TPO) as soon as possible and no later than one month prior to start of construction.
- Notify the CAM and TPO/Contracting Officer (CO) if the recipient has a CBA.
 - A CBA will need a separate process of being sent to the Department of Labor (DOL) for conformance/conversion to a specific WD for the project/prime.
- Provide access to LCPtracker for subrecipients and subcontractors.
 - Including verification of identity.
- Ensure that all DBA/prevaling wage requirements flow down to subrecipients, subcontractors, and vendors.
- Submit weekly payrolls to LCPtracker.
- Monitor all weekly payroll submissions (prime, subs, and contractors/vendors).
- Ensure compliance with weekly payroll submissions and work with subrecipients/subcontractors/vendors to correct submissions as needed.
- Submit Semi-Annual DBA Enforcement Reports in accordance with deadlines set by DOE.
- Notify CAM and TPO of any concerns with DBA compliance.
- Ensure that all subrecipients and contractors/vendors submit proposed WD(s) or CBA(s).

Products:

- Proposed WD(s) or CBA(s) submitted to LCPtracker
- Weekly payrolls submitted to LCPtracker
- Semi-Annual Davis-Bacon Act Enforcement Report

Subtask 1.6 Final Report

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, and results 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 1.6.1 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 Product:

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

Subtask 1.6.2 Final Report

The Recipient shall:

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

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Outline, Energy Commission Style Manual, and Final Report Template provided by the CAM. Report elements that may be required are as follows:

- Cover page
- Credits page on the reverse side of cover with legal disclaimer
- Acknowledgements page
- Preface
- Abstract, keywords, and citation page
- Table of Contents
- Executive summary
- Body of the report
- References
- Glossary/Acronyms
- Bibliography
- Appendices
- Attachments
- 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:

- Draft Final Report
- Written Responses to Comments (*if applicable*)
- Final Report

CAM Product:

- Written Comments on the Draft Final Report

MATCH FUNDS, PERMITS, AND SUBCONTRACTS

Subtask 1.7 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. With the exception of match funds allocated for permitting and environmental review, the Recipient may only spend match funds during the Agreement term, either concurrently or prior to the use of CERRI funds. 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.

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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. Match funds will be included as a line item in the Quarterly 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 Agreement. Reduction of match funds may trigger a CPR meeting, or, if federal requirements are violated by the reduction, cancellation of the Agreement.

Products:

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

Subtask 1.8 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 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

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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 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 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 1.9 Subcontracts

The goals of this subtask are to: (1) procure and execute subcontracts and site host agreements, as applicable, required to carry out the tasks under this Agreement; and (2) ensure that the subcontracts (including vendors) and site host agreements are consistent with the Agreement terms and conditions and the Recipient's own contracting policies and procedures of this Agreement.

The Recipient shall:

- Execute and manage subcontracts and coordinate subcontractor 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 subcontract.
- Include any required CEC flow-down provisions in each subcontract, in addition to a statement that the terms of this Agreement will prevail if they conflict with the subcontract terms.
- Submit a *Subcontract and Site Letter* to the CAM describing the subcontracts and any site host agreement needed or stating that no subcontracts or site host agreements are required.
- If requested by the CAM, submit a draft of each *Subcontract* 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 subcontract.
- Notify and receive written approval from the CAM prior to adding any new subcontractors (see the discussion terms regarding subcontractor additions in the terms and conditions).

Products:

- Subcontract and Site Letter (*if applicable*)
- Subcontracts (*draft if required by the CAM*)
- Draft Site Host Agreement (*if requested by the CAM*)
- Final Subcontracts (*if requested by the CAM*)

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- Final Site Host Agreement (*if requested by the CAM*)

Subtask 1.10 Project Metrics

The goal of this subtask is to finalize key performance measures for the project and report on final results in achieving those measures. The performance measures should be a combination of job creation and training, community engagement activities and events, and impact metrics that provide the most significant indicator of the project's potential success.

The Recipient shall:

- Complete and submit the *Project Metrics and Impact Report* to the CAM prior to December 15 of each project year. Each Program Metrics and Impact Report must:
- Detail baseline impact metrics (performance measures), current fiscal year impact metrics (performance measures), job creation and training, workforce demographics, and community engagement activities and events.
- See the Project Metrics and Impact Report Format Attachment and Instructions for the required specifications:
 - [Annual Project Metrics and Impact Report Instructions:](https://www.energy.ca.gov/media/9029)
<https://www.energy.ca.gov/media/9029>
 - [Annual Project Metrics and Impact Report Template:](https://www.energy.ca.gov/media/9030)
<https://www.energy.ca.gov/media/9030>
- Develop and submit a *Project Metrics Results* document describing the extent to which the Recipient met each of the initial performance metrics as described in Project Metrics - Attachment 09.
- Discuss the *Project Performance Metrics Results* at the Final Meeting.

Products:

- Project Metrics and Impact Report (submitted annually)
- Project Performance Metrics Results

IV. TECHNICAL TASKS

The goal of the Technical Tasks is to ensure the successful execution, testing, and commissioning of the infrastructure upgrade project. This involves conducting a comprehensive field assessment, procuring qualified contractors, overseeing project implementation, and commissioning the completed infrastructure upgrades. The aim is to guarantee that all installed systems operate effectively, meet project specifications, and enhance energy reliability and resilience for the benefit of the community.

TASK 2: FIELD ASSESSMENT AND DESIGN PREPARATION

The goal of this task is to conduct a comprehensive field assessment and prepare design details for the distribution switch upgrades.

The Recipient shall:

- Hire a design consultant and summarize the process in *Design Consultant Memo*. The design consultant will conduct and prepare a *Field Assessment Report* of the existing infrastructure.
- Collaborate with the design consultant to analyze the assessment findings and prepare *Detailed Design Plans* for the distribution switch upgrades.

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Products:

- Design Consultant Memo
- Field Assessment Report
- Detailed Design Plans

TASK 3: COMMUNITY ENGAGEMENT AND IMPACTS

The goal of this task is to plan and execute community engagement activities and report on benefits and metrics identified in Project Metrics, Attachment 09.

The Recipient shall:

- Develop and submit a *Community Engagement and Impacts Plan* in coordination with a community-based organization(s) or Tribe(s), which outlines the planned community engagement activities and summarizes the qualitative and quantitative impacts of community engagement. The plan will include a timeline, locations, role of the CBO, type of engagement and method, and any other relevant information.
- Conduct all activities listed in the *Community Engagement and Impacts Plan* and provide a copy of any relevant engagement materials to the CAM.
 - Invite CAM to all community engagement activities as an optional attendee.
- Collaborate closely with the CBO to facilitate the activities outlined in the *Community Engagement and Impacts Plan*, including, without limitation, joint efforts to effectively engage residents, businesses, and stakeholders via outreach, feedback collection, and impact assessment. Ensure the CBO's active involvement in the planning, execution, and follow-up of community engagement activities, such as public meetings, surveys, workshops, and informational sessions.
- The CBO will participate in the project's community engagement activities, ensuring their representation at meetings, forums, and events. The CBO will help organize these activities, engaging with community members, addressing concerns, and promoting dialogue for maximum participation.
- Collaborate with the CBO to assess project benefits and impacts on the community, utilizing their expertise and local knowledge to ensure a comprehensive understanding of outcomes and implications. In coordination with the CBO, the Recipient will inform and solicit input from stakeholders and community members at 5 Council District meetings and issue 1 virtual survey to seek community feedback regarding the project's benefits and to gather input on design and implementation.
- Enhance community engagement efforts in collaboration with the CBO to ensure broad participation and provide interpretation services at public forums to accommodate varying language needs. Develop and distribute *English and Spanish Communication Engagement Materials* to ensure accessibility to all community members.
- Utilize various communication channels, including, without limitation, social media, newsletters, and local media outlets, to disseminate project updates and engage with the broader community.
- Prepare a *Community Engagement and Impacts Report* which details the project's engagement efforts, plus the results and metrics. The report will demonstrate how they incorporated community feedback into the project, and list benefits.
- Provide at least (6) six *High-Quality Digital Photographs* (minimum resolution of 1300x500 pixels in landscape ratio) of community engagement activities.

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Products:

- Community Engagement and Impacts Plan (Draft and Final)
- Community Engagement and Impacts Report (Draft and Final)
- Copies of English and Spanish Communication Engagement Materials (Presentations, Photos, Literature) (Draft and Final)
- High-Quality Digital Photographs

TASK 4: WORKFORCE DEVELOPMENT

The goal of this task is to develop and execute a workforce development plan that will attract, train, and retain a skilled workforce through partnerships with the International Brotherhood of Electrical Workers (IBEW) Local 47, Anaheim Workforce Development Board (AWDB), the Joint Apprenticeship and Training Committee (JATC), and California State University of Fullerton (CSUF) for durable careers in the energy industry. Additionally, the task aims to support economic development initiatives to promote job creation, and enhance the city's infrastructure to facilitate business growth.

The Recipient Shall:

- Develop and submit a *Workforce Development Plan* outlining the recipient's planned activities and the roles of all participants and partners. Summarize the activities' quantitative and qualitative impacts. Include a timeline of activities with locations and remote options.
- Attend CPR Meeting #1 and prepare CPR Report #1.
- Collaborate with the CBO to develop targeted outreach for workforce development activities.
- Coordinate with the CBO to organize informational workshops focused on opportunities in the utility sector and promoting internships and apprenticeships for community members.
- Facilitate networking between CBO representatives, city officials, and industry professionals to foster collaboration and resource sharing.
- Implement activities identified in the *Workforce Development Plan*, including workforce development partnerships with the IBEW Local 47, JATC, CSUF, and AWDB.
- Develop and submit copies of *Training and Promotional Materials*.
- Provide formal classroom instruction and on-the-job training in the utility sector for up to 60 individuals, including City employees, up to 4 apprentices, up to 4 interns, and up to 5 new jobs.
- Develop and submit a *Workforce Development Report* detailing the efforts and outcomes of job training, apprenticeships, and internships. The report will include the number of apprenticeships and internships filled, the types of training programs offered, the number of individuals completing each program, and any new jobs created due to the workforce development initiatives.
- Provide at least (6) six *High-Quality Digital Photographs* (minimum resolution of 1300x500 pixels in landscape ratio) of workforce development activities, including training sessions, mentorship and collaboration between stakeholders, prequalified contractors, staff and interns/apprentices, on-site work experiences, and classroom settings. These images will visually document the city's commitment to training a skilled workforce in the utility sector and highlight the diverse opportunities available to interns and apprentices.

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- Support local economic development initiatives by promoting job creation targeting local communities, attracting high-tech industries, and enhancing the city's infrastructure to facilitate business growth.
- Prioritize opportunities for small and women/minority-owned businesses to participate in project contracts and procurement.

Products:

- Workforce Development Plan (Draft and Final)
- Workforce Development Report (Draft and Final)
- Copies of Training and Promotional Materials
- High-Quality Digital Photographs
- CPR Report #1

TASK 5: CONTRACTOR PROCUREMENT AND COORDINATION

The goal of this task is to procure a qualified contractor and coordinate the implementation of infrastructure upgrades.

The Recipient shall:

- Develop *Contractor Bid Solicitation Documentation* in preparation for soliciting bids from qualified contractors for the distribution switch upgrades.
- Select a High-Voltage Prequalified Contractor based on past project performance and expertise and prepare a *Contractor Selection Summary* outlining the selection criteria, evaluation process, and rationale for choosing the contractor, ensuring transparency and accountability in the selection process.
- Develop an *Outage Coordination Plan* and organize outage schedules with the Recipient's operations and property owners.
- Create a *Customer Communication Plan and Materials*; notify customers of planned power outages and manage communication throughout the Project.
- Prepare a *CPR Report #2* and attend CPR Meeting with the CAM..

Products:

- Contractor Bid Solicitation Documentation
- Contractor Selection Summary
- Outage Coordination Plan
- Customer Communication Plan and Materials
- CPR Report #2

TASK 6: EQUIPMENT INSTALLATION, TESTING, AND COMMISSIONING

The goal of this task is to ensure the successful removal of old switches, site preparation, and installation of new switches and automation materials. This task also involves thorough testing, thereby guaranteeing that all installed systems operate effectively and meet project goals.

The Recipient shall:

- Oversee the removal of old switches, transportation to the new site, repair or replacement of failing cables, and construction of concrete pads as needed.
- Supervise the installation of new switch and automation equipment, high-voltage and

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- control cables, and integration with SCADA controls.
- Develop and conduct a *Test Plan for the Infrastructure Improvements*.
- Commission the completed project to ensure all systems function correctly and meet project requirements.
- Develop an *Infrastructure Upgrade Implementation Report* detailing the final design and execution of the infrastructure upgrade project.
- Prepare a *CPR Report #3* and attend CPR Meeting with the CAM.
- Provide at least (6) six *High-Quality Digital Photographs* (minimum resolution of 1300x500 pixels in landscape ratio) of the completed installation, after successful commissioning.

Products:

- Test Plan for the Infrastructure Improvements
- Infrastructure Upgrade Implementation Report
- CPR Report #3
- High Quality Digital Photographs

TASK 7: EVALUATION OF PROJECT BENEFITS

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

The Recipient shall:

- Complete the *Annual Survey* by January 31st of each year.
- Complete and update the project profile on the CEC's public online project and recipient directory and provide *Documentation of the Project Profile on the Energize Innovation website* (<http://www.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](http://www.energizeinnovation.fund) (<http://www.energizeinnovation.fund>), and provide *Documentation of Organization Profile* on <http://www.energizeinnovation.fund>, including the profile link.

Products:

- Annual Survey(s)
- Documentation of Project Profile on <http://www.energizeinnovation.fund>
- Documentation of Organization Profile on <http://www.energizeinnovation.fund>.

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.