



**California Energy Commission
July 08, 2026 Business Meeting
Backup Materials for Pacific Gas and Electric Company**

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

CALIFORNIA ENERGY COMMISSION

PROPOSED RESOLUTION: Pacific Gas and Electric Company

RESOLUTION NO: 26-0708-XX

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-26-001 with Pacific Gas and Electric Company for a \$4,095,671 grant. This project will support a scaled demonstration and evaluation of second-generation smart electricity meters equipped with distributed intelligence applications (DI Apps) at 9,000 residences within Pacific Gas and Electric's service territory. The project will assess multiple DI Apps and edge-computing use cases that are designed to improve customer affordability, support load growth and electric vehicle adoption, defer traditional distribution transformer investments, and reduce wildfire ignition risk; and

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

APPROVED AND ADOPTED this 08 day of July 2026, by the following vote:

AYE:

NAY:

ABSENT:

ABSTAIN:

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 approved and adopted by affirmative vote of the CEC at a meeting held on July 08, 2026.

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-26-001

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Sebastian Rubio Ruiz
3. MS-:None
4. Phone Number: NA

C. Recipient's Information

1. Recipient's Legal Name: Pacific Gas and Electric Company

D. Title of Project

Title of project: Edge Computing on Meters (ECOM)

E. Term and Amount

1. Start Date: 7/14/2026
2. End Date: 3/31/2030
3. Amount: \$4,095,671.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 7/8/2026
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name:
5. Time Needed for Business Meeting:
6. The email subscription topic is: EPIC

Project Description:

Pacific Gas and Electric Company. Proposed resolution approving agreement EPC-26-001 with Pacific Gas and Electric Company for a \$4,095,671 grant, and adopting staff's recommendation that this action is exempt from CEQA. This project will support a scaled demonstration and evaluation of second-generation smart electricity meters equipped with distributed intelligence applications (DI Apps) at 9,000 residences within Pacific Gas and Electric's service territory. The project will assess multiple DI Apps and edge-computing use cases that are designed to improve customer affordability, support load growth and electric vehicle adoption, defer traditional distribution transformer investments, and reduce wildfire ignition risk. (EPIC funding)
Contact: Sebastian Rubio Ruiz

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: If Agreement is considered a "Project" under CEQA skip to question 2. Otherwise, provide explanation.

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: PRC section number 1, PRC section number 2. Or, "None"

CCR section number: CCR section number 1, CCR section number 2. Or, "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: CCR Section 15301, CCR Section 15302

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

Enter Yes or No

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

Enter "Not applicable" or reason why Agreement is exempt under the above section

California Code of Regulations, Title 14, Section 15301 provides that projects which consist of the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, and which involve negligible or no expansion of use beyond that existing at the time of the lead agency's determination, are categorically exempt from CEQA. The project consists of replacing existing electric meters with AMI 2.0 enabled smart meters on several thousand customer premises within PG&E territory. Buildings in which the electric meters exist will not be structurally altered or suffer any damage as part of the meter installations. These modifications will not result in any expansion of capacity. For these reasons, the proposed work will not have any significant effect on the environment and falls under Section 15301.

California Code of Regulations, Title 14, Section 15302 provides that the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced is categorically exempt from CEQA. This exemption includes the replacement or reconstruction of existing utility systems and/or facilities involving negligible or no expansion of capacity. Consistent with Section 15302, the project



consists of installing AMI 2.0 meters in place of existing customer electric meters in various buildings within PG&E territory. The replacement meters will be installed on the same site and location as the existing meters that are to be replaced and will have substantially the same purpose and capacity as the existing structures: the meters will provide real-time monitoring of voltage uses and insight into load management, time-of-use rates, costs, and grid flexibility and reliability. These modifications will result in negligible or no expansion of capacity to the existing meters. The proposed work therefore falls under Section 15302.

This project does not involve impacts on any particularly sensitive environment; 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.

For these reasons, the proposed work will not have any significant effect on the environment and falls under sections 15301, and 15302.

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
Itron Networked Solutions, Inc.	\$1,200,001	\$203,401

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 or sellers to report	\$0	\$0

K. Key Partners

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

Key Partner Legal Company Name
No key partners to report

L. Budget Information

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

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
EPIC	25-26	301.001M	\$4,095,671

TOTAL Amount: \$4,095,671

R&D Program Area: ESTB: ETSI

Explanation for “Other” selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: Not applicable

M. Recipient’s Contact Information

1. Recipient’s Administrator/Officer

Name: Scott Loveless

Address: 300 Lakeside Dr

City, State, Zip: Oakland, CA 94612-3534

Phone:

E-Mail: SXLN@pge.com



2. Recipient's Project Manager

Name: Scott Loveless

Address: 300 Lakeside Dr

City, State, Zip: Oakland, CA 94612-3534

Phone:

E-Mail: SXLN@pge.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-24-312
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 Number	Item Name	Attached
1	Exhibit A, Scope of Work/Schedule	Yes
2	Exhibit B, Budget Detail	Yes
3	CEC 105, Questionnaire for Identifying Conflicts	Yes
4	Recipient Resolution	No
5	Awardee CEQA Documentation	No

Approved By

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

Agreement Manager: Sebastian Rubio Ruiz

Approval Date: 5/27/2026

Office Manager: Rey Gonzalez

Approval Date: 5/29/2026



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 01/2026)

Deputy Director: Rey Gonzalez for Jonah Steinbuck

Approval Date: 5/29/2026

EXHIBIT A
Scope of Work
Pacific Gas and Electric Company

I. TASK AND ACRONYM/TERM LISTS

A. Task List

Task #	CPR¹	Task Name
1		General Project Tasks
2		Perform Detailed Scoping of DI Apps
3	X	Identify Target Locations for Meter Deployment
4		Localize and Configure DI Apps
5		Perform Meter Replacements
6	X	Iteratively Test, Deploy, and Monitor DI Apps
7		Evaluation of Project Benefits
8		Technology/Knowledge Transfer Activities

B. Acronym/Term List

Acronym/Term	Meaning
AMI 2.0	Second-Generation Advanced Metering Infrastructure
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
DI	Distributed Intelligence: Technology that allows for the ability of electric 2.0 meters and sensors to process data locally (grid edge computing) and to make decentralized decisions rather than relying on a centralized utility system. This enhances grid efficiency, responsiveness, and the security of the grid.
DI App	Distributed Intelligence Application: Purpose-built applications that run directly on electric 2.0 meters and other grid-edge devices. These applications process data locally, enabling real-time decision-making without relying on a centralized utility system. DI applications allow electric 2.0 meters to detect issues, optimize performance, and communicate with other grid devices autonomously.
DER	Distributed Energy Resource: Energy generation and storage systems, like solar panels or batteries, which are located near the point of use, rather than at a centralized power plant, offering flexibility and potentially reducing grid dependence.
EV	Electric Vehicle
HFTD	High-Fire Threat District
TAC	Technical Advisory Committee

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

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

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A. Purpose of Agreement

The purpose of this Agreement is to fund a scaled demonstration and evaluation of a network of second generation advanced metering infrastructure (AMI 2.0) electric smart meters with Distributed Intelligence Applications (DI Apps). The project will test several DI Apps and edge computing use-cases that benefit customer affordability, facilitate load growth and electric vehicle (EV) adoption, defer traditional transformer investments, and reduce wildfire ignition risk.

B. Problem/ Solution Statement

Problem

Traditional utility operations depend on centralized data analytics that are becoming increasingly inadequate for real-time risk mitigation or load management at the grid edge. In high-fire threat districts (HFTDs), latency in identifying abnormal voltage, arcing, or high impedance faults increases the risk of ignitions. In residential neighborhoods, unmanaged EV charging can overload transformers and service panels.

While utilities have made significant investments in smart meters and grid modernization, Distributed Intelligence (DI) benefits have not been fully operationalized. The DI capabilities embedded in AMI 2.0 infrastructure can help address the above problems, but face barriers related to their high capital costs. Operationalizing and validating the grid reliability and customer affordability benefits of AMI 2.0 and DI App use cases is necessary for regulators, utilities, and ratepayers to evaluate the cost and benefit tradeoffs ahead of larger scale deployment.

Solution

To address the limitations of traditional utility operations and to enhance real-time risk mitigation and load management at the grid edge, the Recipient will operationalize DI Apps on a scaled network of AMI 2.0 installations to evaluate specific uses cases. Use cases demonstrated and validated in this project include:

- Real-time monitoring and fault detection through rapid identification of abnormal voltage, arcing, and high impedance faults in HFTDs, thereby reducing the risk of ignitions.
- Optimized grid edge load management that balances EV charging and/or other residential loads within service transformer and panel limits, preventing overloads and promoting customer and ratepayer affordability and electrification.
- Enhanced insights for residential and commercial customers that enable them to more effectively respond to time-of-use rates, manage costs, and support grid flexibility and reliability.

C. Goals and Objectives of the Agreement

Agreement Goals

The primary goal of this Agreement is to operationalize DI Apps in a scaled demonstration that validates their performance and benefits including enhanced grid reliability and public safety, deferral of infrastructure upgrades and customer panel replacements, reduction of greenhouse emissions, and expanded equitable access to clean energy technologies. An additional goal is

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to gain experience in DI App configuration and deployment, including with artificial intelligence and machine learning, that can help accelerate development of additional apps and capabilities in the future.

Ratepayer Benefits:²

This Agreement will result in the ratepayer benefits of greater electricity reliability, lower costs, and increased safety through the following:

- Wildfire risk reduction by enabling faster identification of ignition-causing faults, allowing for proactive remediation.
- Reduced electrification costs by managing EV and other residential loads such that expensive service panel and line upgrades are avoided.
- Reduced outages and need for investment in distribution transformer replacement by preventing overload conditions and enabling proactive monitoring.
- Enabling customer electricity bill savings based on refined load insights and participation in targeted demand response programs and real-time pricing.

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 advancing DI Apps for grid edge control and optimization of customer loads to facilitate electrification and EV adoption by lowering customer costs associated with service line and panel upgrades. Furthermore, the high frequency load data gathered by the technologies validated in this project will enable targeted load management, demand response, and dynamic pricing participation for customers, which can help increase renewable and DER integration while maintaining affordability and grid stability in an increasingly inverter-centric electric grid. These advancements can directly support achievement of Senate Bill 100 (Chapter 312, Statutes of 2018) goals that require 100 percent zero carbon, renewable retail electricity sales in California by 2045.

Agreement Objectives

The objectives of this Agreement are to:

- Configure at least two (2) DI Apps that meet or exceed performance criteria within a larger geographic footprint, beyond past limited pilot demonstrations, and validate their performance.
- Integrate DI Apps with advanced artificial intelligence and machine learning algorithms and leverage the edge computing capabilities of next generation smart meters into utility processes to inform and facilitate deployment of the technology on a larger scale.
- Gather data, insights, and experience to inform future DI App development, wildfire risk models, and distribution capital planning.

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

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

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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**

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- Submit all data and documents required as products under this Agreement in an electronic file format that is fully editable and compatible with the California Energy Commission's (CEC) software and Microsoft (MS)-operating computing platforms, or with any other format approved by the CAM. Deliver an electronic copy of the full text of any Agreement data and documents in a format specified by the CAM, such as memory stick.

The following describes the accepted formats for electronic data and documents provided to the CEC as products under this Agreement, and establishes the software versions that will be required to review and approve all software products:

- Data sets will be in MS Access or MS Excel file format (version 2007 or later), or any other format approved by the CAM.
 - Text documents will be in MS Word file format, version 2007 or later.
 - Project management documents will be in Microsoft Project file format, version 2007 or later.
- **Software Application Development**
Use the following standard Application Architecture components in compatible versions for any software application development required by this Agreement (e.g., databases, models, modeling tools), unless the CAM approves other software applications such as open source programs:

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

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

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

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administrative and technical aspects of the Agreement will be discussed at the meeting. Prior to the meeting, the CAM will provide an agenda to all potential meeting participants. The meeting may take place in person or by electronic conferencing (e.g., Teams, Zoom), with approval of the CAM.

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

- The CAM's expectations for accomplishing tasks described in the Scope of Work;
- An updated Project Schedule;
- Terms and conditions of the Agreement;
- Invoicing and auditing procedures;
- Travel;
- Equipment purchases;
- Administrative and Technical products (subtask 1.1);
- CPR meetings (subtask 1.3);
- Monthly Calls (subtask 1.5)
- Quarterly Progress reports (subtask 1.6)
- Final Report (subtask 1.7)
- Match funds (subtask 1.8);
- Permit documentation (subtask 1.9);
- Subawards (subtask 1.10);
- Technical Advisory Committee meetings (subtasks 1.11 and 1.12);
- Agreement changes;
- Performance Evaluations; and
- Any other relevant topics.
- Provide *Kick-off Meeting Presentation* to include but not limited to:
 - Project overview (i.e., project description, goals and objectives, technical tasks, expected benefits, etc.)
 - Project schedule that identifies milestones
 - List of potential risk factors and hurdles, and mitigation strategy
- Provide an *Updated Project Schedule*, *Match Funds Status Letter*, and *Permit Status Letter*, as needed to reflect any changes in the documents.

The CAM shall:

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

Recipient Products:

- Kick-off Meeting Presentation
- 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

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

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

The Recipient shall:

- Prepare and submit a *CPR Report* for each CPR meeting that: (1) discusses the progress of the Agreement toward achieving its goals and objectives; and (2) includes recommendations and conclusions regarding continued work on the project.
- Attend the CPR meeting.
- Present the CPR Report and any other required information at each CPR meeting.

The CAM shall:

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

Recipient Products:

- CPR Report(s)

CAM Products:

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- CPR Agenda(s)
- Progress Determination

Subtask 1.4 Final Meeting

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

The Recipient shall:

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

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

- The technical portion of the meeting will involve the presentation of findings, conclusions, and recommended next steps (if any) for the Agreement. The CAM will determine the appropriate meeting participants.
- The administrative portion of the meeting will involve a discussion with the CAM of the following Agreement closeout items:
 - Disposition of any procured equipment.
 - The CEC's request for specific "generated" data (not already provided in Agreement products).
 - Need to document the Recipient's disclosure of "subject inventions" developed under the Agreement.
 - "Surviving" Agreement provisions such as repayment provisions and confidential products.
 - Final invoicing and release of retention.
- Prepare a *Final Meeting Agreement Summary* that documents any agreement made between the Recipient and Commission staff during the meeting.
- Prepare a *Schedule for Completing Agreement Closeout Activities*.
- Provide copies of *All Final Products* organized by the tasks in the Agreement.

Products:

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

MONTHLY CALLS, REPORTS AND INVOICES

Subtask 1.5 Monthly Calls

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

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

The CAM shall:

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

The Recipient shall:

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

Product:

- Email to CAM concurring with call summary notes.

Subtask 1.6 Quarterly Progress Reports and Invoices

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

The Recipient shall:

- Submit a *Quarterly Progress Report* to the CAM. Each progress report must:
 - Summarize progress made on all Agreement activities as specified in the scope of work for the reporting period, including accomplishments, problems, milestones, products, schedule, fiscal status, and an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Progress reports are due to the CAM the 10th day of each January, April, July, and October. The Quarterly Progress Report template can be found on the ECAMS Resources webpage available at: <https://www.energy.ca.gov/media/4691>
- Submit a monthly or quarterly *Invoice* on the invoice template(s) provided by the CAM.

Recipient Products:

- Quarterly Progress Reports
- Invoices

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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.)
 - Bibliography (if applicable)

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- 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:

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

Products:

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

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

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obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in progress reports and will be a topic at CPR meetings.

- If during the course of the Agreement additional permits become necessary, then provide the CAM with an *Updated List of Permits* (including the appropriate information on each permit) and an *Updated Schedule for Acquiring Permits*.
- Send the CAM a *Copy of Each Approved Permit*.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM within 5 days. Either of these events may trigger a CPR meeting.

Products:

- Permit Status Letter
- Updated List of Permits (*if applicable*)
- Updated Schedule for Acquiring Permits (*if applicable*)
- Copy of Each Approved Permit (*if applicable*)

Subtask 1.10 Obtain and Execute Subawards and Agreements with Site Hosts

The goals of this subtask are to: (1) procure 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:

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- 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, 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;

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- Utility representatives;
- Air district staff; and
- Members of relevant technical society committees.

The Recipient shall:

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

Products:

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

Subtask 1.12 TAC Meetings

The goal of this subtask is for the TAC to provide strategic guidance for the project by participating in regular meetings, which may be held via teleconference.

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.

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- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate on behalf of the project in its effort to build partnerships, governmental support and relationships with a national spectrum of influential leaders.
- Ask probing questions that ensure a long-term perspective on decision-making and progress toward the project's strategic goals.
- Review and provide comments to proposed project performance metrics.
- Review and provide comments to proposed project Draft Technology Transfer Plan.

Products:

- TAC Meeting Schedule (draft and final)
- TAC Meeting Agendas (draft and final)
- TAC Meeting Back-up Materials
- TAC Meeting Summaries

Subtask 1.13 Project Performance Metrics

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

The Recipient shall:

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

Products:

- TAC Performance Metrics Summary
- Project Performance Metrics Results

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IV. TECHNICAL TASKS

TASK 2: PERFORM DETAILED SCOPING OF DI APPS

The goal of this task is to align project teams on desired technical features, functions, and configuration of DI Apps. The set of core foundation DI Apps will be defined to support the specific set of use cases validated in this Agreement.

The Recipient shall:

- Collaborate with key technology vendor(s) to create *DI App Project Charters* that may include, but are not limited to, the following:
 - DI App description, purpose, and intended use, including but not limited to the following DI Apps and functionalities:
 - Location awareness to provide geospatial intelligence, meter-to-transformers, meter-to-phase, and meter-feeder electric connectivity relationships, enabling better situational awareness and asset tracking.
 - Active transformer monitoring to support aggregated loading and voltage performance on the local grid in near real-time, provide enhanced state awareness, and allow real-time decision making to prevent overloads, support and improve hosting capacity, and improve reliability.
 - High impedance detection to profile the meter-to-source impedance and allow for identifying poor or failing connections, improving safety and outage response.
 - Waveform anomaly detection to identify both consumer or grid-side abnormal waveform patterns that may indicate faults or equipment issues, and use data to support prioritization and management of such events.
 - Local electric vehicle charger detection and management to identify and enable management of EV charger(s) to improve hosting capacity and defer capital investment at the premise and distribution system levels.
 - Technical requirements for participating customers (e.g., Wi-Fi availability, EV charger communication protocols, baseline data) and smart meters (e.g., firmware numbers).
 - Initial architecture design to support operationalization of the DI Apps and data flows.
- Develop a *DI App Product Roadmap* that outlines the milestones, timelines, and deliverables for DI App localization and integration with Information Technology and utility workorder management systems.

Products:

- DI App Project Charter(s)
- DI App Product Roadmap

TASK 3: IDENTIFY TARGET LOCATIONS FOR METER DEPLOYMENT

The goal of this task is to finalize the cohort(s) of customers that will have their electric meters replaced and participate in the demonstration project. Cohorts will represent various customer types and grid conditions to demonstrate the performance of DI Apps with sufficient statistical significance.

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The Recipient shall:

- Develop an *ECOM Deployment Location Plan* that includes, but is not limited to:
 - Definition of customer target segments and the number included in the demonstration.
 - Purpose and basis behind choosing each target segment.
 - Key attributes of each customer segment in relation to DI App performance/function measured.
 - Discussion of the representativeness of the cohort(s) relative to the Recipient's customer base and service territory.
- Prepare a *CPR Report #1* in accordance with subtask 1.3.
- Participate in a CPR Meeting.

Products:

- ECOM Deployment Location Plan
- CPR Report #1

TASK 4: LOCALIZE AND CONFIGURE DI APPS

The goal of this task is to advance existing DI Apps by integrating them with the Recipient's communications infrastructure and configuring them to perform under a range of grid scenarios reflective of the Recipient's service territory.

The Recipient shall:

- Establish the necessary cloud and communications infrastructure to support DI app deployment.
- Ensure cyber and data security compliance of DI apps.
- Collaborate with key technology vendor(s) to configure DI apps to ensure adequate performance under a range of locations and grid conditions.
- Establish reporting tools and data pipelines in DI apps that support recording performance metrics, validation, and iterative development and testing.
- Summarize DI App configurations, technical specifications, cloud, and computing architecture in a non-confidential *DI Application Specifications Report*.
- Install DI Apps directly on capable smart meters ahead of installation and demonstration.

Products:

- DI Application Specifications Report

TASK 5: PERFORM METER REPLACEMENTS

The goal of this task is to conduct electric meter replacements to customer sites identified in the in Task 3, leveraging the Recipient's customer service organization to conduct community outreach and customer education.

The Recipient shall:

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- Develop and launch *Awareness Campaign Educational Materials* that facilitate meter replacements and engage and communicate customers about the uses and benefits of DI Apps and AMI 2.0.
- Dispatch meter technicians to install AMI 2.0 meters with DI Apps at customer premises, tracking completed meter installs and integrating with the Recipient's billing and communications systems.
- Record the locations of installations in mapping systems as well as summary statistics about the customer and infrastructure characteristics represented in the installations.
- Summarize the installation, including any challenges and lessons learned, maps of completed meter installations, and any findings from the customer awareness and education campaign in a *Meter Installation and Customer Engagement Report*.

Products:

- Awareness Campaign Educational Materials
- Meter Installation and Customer Engagement Report

TASK 6: ITERATIVELY TEST, DEPLOY, AND MONITOR DI APP PERFORMANCE

The goal of this task is to test configured DI Apps on deployed meters, monitor their performance, and iterate on settings and configurations to optimize their performance.

The Recipient shall:

- Develop a *Test and Validation Plan* (draft and final), detailing the Recipient's planned testing setup, approach, methods, schedule, and key milestones for evaluating the in-field performance of each of the DI Apps.
- Adjust DI App configurations to optimize their performance based on preliminary test results.
- Document findings and results of the DI App field testing into a *Test Summary Report* (draft and final) that includes an overview of any adjustments or improvements made and assessment of potential applicability, benefits, and costs for larger scale deployment.
- Develop a Decision Support Tool that operational teams will use to determine where DI Apps have the greatest potential to benefit customers. The Recipient will determine and develop the most appropriate Decision Support Tool depending on the specific use case.
Recipient shall:
 - Conduct early-stage stakeholder engagement (e.g., with utility engineers, distribution planners, regulatory staff, distributed energy resource developers) to identify decision points, preferred metrics, and integration needs.
 - Design user interface elements (e.g., maps, visualizations, exportable reports) that align with regulatory requirements and utility planning processes such as distribution planning, load forecasting, and load-add project approval workflows.
 - Conduct usability testing and refine the tool to improve its utility for intended users.
 - Develop a *Decision Support Tool Summary* that documents the approach and findings as well as the tool's design, functionality, stakeholder engagement process, and recommended next steps for broader deployment.
- Prepare a *CPR Report #2* in accordance with subtask 1.3.
- Participate in a CPR Meeting.

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Products:

- Test and Validation Plan (draft and final)
- Test Summary Report (draft and final)
- Decision Support Tool Summary
- CPR Report #2

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

Products:

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

TASK 8 TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES

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The goal of this task is to ensure the technological learning that resulted from the demonstration(s) is captured and disseminated to the range of professions that will be responsible for future deployments of this technology or similar technologies.

The Recipient Shall:

- Develop and submit a *Project Case Study Plan* that outlines how the Recipient will document the planning, construction, commissioning, and operation of the technology or system being demonstrated. The Project Case Study Plan should include:
 - An outline of the objectives, goals, and activities of the case study.
 - The organization that will be conducting the case study and the plan for conducting it.
 - A list of professions and practitioners involved in the technology's deployment.
 - Specific activities the recipient will take to ensure the learning that results from the project is disseminated to those professions and practitioners.
 - Presentations/webinars/training events to disseminate the results of the case study.
- Present the draft *Project Case Study Plan* to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments* that summarizes comments received from the TAC members on the draft *Project Case Study Plan*. This document will identify:
 - TAC comments the Recipient proposes to incorporate into the final *Technology Transfer Plan*.
 - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Submit the final *Project Case Study Plan* to the CAM for approval.
- Execute the final Project Case Study Plan and develop and submit a Project Case Study.
- When directed by the CAM, develop presentation materials for a CEC sponsored conference/workshop(s) on the project.
- When directed by the CAM, participate in annual EPIC symposium(s) sponsored by the California CEC.
- Provide at least (6) six High Quality Digital Photographs (minimum resolution of 1300x500 pixels in landscape ratio) of pre- and post-technology installation at the project sites or related project photographs.

Products:

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

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.