



California
ENERGY COMMISSION



**California Energy Commission
August 17, 2026 Business Meeting
Backup Materials for EvGateway**

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: EvGateway
RESOLUTION NO: 26-0817-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-26-004 with EvGateway for a \$3,750,000 grant. This project will demonstrate a fully integrated Distributed Energy Resource paired commercial fleet charging microgrid combining solar PV, electric school buses as mobile energy storage ("batteries on wheels"), UL 3141-certified power control systems (PCS), bidirectional DC fast chargers capable of vehicle-to-grid operation, an IEEE 2030.5-certified local controller, and PG&E Flex Connect integration to support a constrained distribution circuit for the San Francisco Unified School District; 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 17 day of August 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 August 17, 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-26-004

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Sean Dory
3. MS-:None
4. Phone Number:

C. Recipient's Information

1. Recipient's Legal Name: EVGateway

D. Title of Project

Title of project: EvGateway's DRIVE Program

E. Term and Amount

1. Start Date: 8/31/2026
2. End Date: 8/30/2030
3. Amount: \$3,750,000.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 8/17/2026 .
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Sean Dory
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge).

Project Description:

EvGateway. Proposed resolution approving agreement EPC-26-004 with EvGateway for a \$3,750,000 grant and adopting staff's recommendation that this action is exempt from CEQA. This project will demonstrate a fully integrated Distributed Energy Resource (DER) paired commercial fleet charging microgrid combining solar PV, electric school buses as mobile energy storage ("batteries on wheels"), UL 3141-certified power control systems (PCS), bidirectional DC fast chargers capable of vehicle-to-grid (V2G) operation, an IEEE 2030.5-certified local controller, and PG&E Flex Connect integration to support a constrained distribution circuit for the San Francisco Unified School District. (Electric Program Investment Charge funding) Contact: Sean Dory

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?

Yes or 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:

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: Cal. Code Regs., tit. 14, § 15303

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.

Demonstration site has already been issued a CEQA categorical exemption (Case No. 2023-007518ENV).

Cal. Code Regs., tit. 14, § 15303 provides that projects which consist of construction and location of limited numbers of new, small facilities or structures; installation of small new equipment and facilities in small structures; and the conversion of existing small structures from one use to another where only minor modifications are made in the exterior of the structure, are categorically exempt from the provisions of CEQA. This project involves the installation of EV chargers that would be considered as small-scale electrical and utility equipment. The EV charging equipment, battery storage units, and related microgrid components function as accessory utility structures consistent with Section 15303. Therefore, the proposed project falls within section 15303 and will not have a significant effect on the environment.

Additionally, the project does not involve any unusual circumstances, will not result in damage to any scenic resources within a highway officially designated as a state scenic highway, none of the sites are 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. The project, when considered as a whole, will not result in a cumulative impact that is significant on the



environment. Therefore, none of the exceptions to exemptions listed in CEQA Guidelines section 15300.2 apply to this project and this project will not have a significant effect on the environment.

b) Agreement **IS NOT** exempt.

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

No

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

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

H. Is this project considered “Infrastructure”?

No

I. Subcontractors

List all Subcontractors listed in the Budget (s) (major and minor). Insert additional rows if needed. If no subcontractors to report, enter “No subcontractors to report” and “0” to funds.

Delete any unused rows from the table.

Subcontractor Legal Company Name	CEC Funds	Match Funds
Zum Services Inc	\$ 1,768,000	\$847,240
DER Security Corp	\$ 1,000,000	\$435,000
WeAccel	\$ 97,392	\$0

J. Vendors and Sellers for Equipment and Materials/Miscellaneous

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

Vendor/Seller Legal Company Name	CEC Funds	Match Funds
Critical Loop	\$100,000	\$0
Tellus Power Green	\$360,000	\$360,000
DER Security Corp	\$705,000	\$335,000



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

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

Zum Services Inc	\$50,000	\$50,000
EVGateway	\$368,500	\$181,500
TBD	\$250,000	\$0
TBD	\$200,000	\$0
TBD	\$90,000	\$0
TBD	\$150,000	\$0
TBD	\$375,000	\$375,000
Various	\$93,000	\$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	\$ 3,750,000

TOTAL Amount: \$ 3,750,000

R&D Program Area: ESB: Renewables

Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: 101 Local Assistance

M. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Prajwal Bhyrappa

Address: 19681 Da Vinci

City, State, Zip: Foothill Ranch, CA 92610-2603

Phone:

E-Mail: prajb@evgateway.com



2. Recipient's Project Manager

Name: Prajwal Bhyrappa

Address: 19681 Da Vinci

City, State, Zip: Foothill Ranch, CA 92610-2603

Phone:

E-Mail: prajb@evgateway.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-25-301
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: Sean Dory

Approval Date: 7/2/2026

Branch Manager: Kevin Uy

Approval Date: 7/2/2026

Director: Jonah Steinbuck delegated to Branch Manager

Approval Date: 7/2/2026

Exhibit A

Scope of Work

EvGateway

I. TASK AND ACRONYM/TERM LISTS

A. Task List

Task #	CPR ¹	Task Name
1		General Project Tasks
2	X	Demonstration Site Development
3	X	Utility Integration & IEEE 2030.5 Aggregation
4		CMS, Local Controller Deployment & Site Optimization
5		Community Engagement
6		Evaluation of Project Benefits
7		Technology/Knowledge Transfer Activities

B. Acronym/Term List

Acronym/Term	Meaning
BESS	Battery Energy Storage System
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CBO	Community-Based Organization
CEC	California Energy Commission
CMS	Charging Management System
CPR	Critical Project Review
DER	Distributed Energy Resource
DERMS	Distributed Energy Resource Management System
DERSec	DER Security Corp
DOE	Dynamic Operating Envelope
EVSE	Electric Vehicle Supply Equipment
EV	Electric Vehicle
IEEE	Institute of Electrical and Electronic Engineers
PCS	Power Control System
PG&E	Pacific Gas & Electric
PV	Photovoltaic
TAC	Technical Advisory Committee
UL	Underwriters Laboratories
V2G	Vehicle-to-Grid

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

A. Purpose of Agreement

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

EvGateway

The purpose of this Agreement is to fund the design, installation, and demonstration of a DER (Distributed Energy Resource)-integrated commercial fleet EV (electric vehicle) charging microgrid that incorporates solar photovoltaic (PV), EV School Buses (acting as Battery Energy Storage System), Underwriters Laboratories (UL) 3141 PCS (Power Control System), V2G (Vehicle-to-Grid) chargers, Institute of Electrical and Electronics Engineers (IEEE) 2030.5-certified communication, and PG&E flexible service participation to reduce grid upgrade requirements, improve charging reliability, and demonstrate a scalable model for electrifying school bus fleets in disadvantaged communities. The project will also develop and maintain a digital twin of the fleet-charging microgrid to support early design decisions, evaluate communications and control strategies, and provide a foundation for training, community education and workforce development.

B. Problem/ Solution Statement

Problem

Commercial fleet depots face long energization delays, costly electrical system upgrades, and limited feeder capacity when deploying EV charging. School bus electrification in particular is constrained by peak-demand loads and the need for reliable daily charging windows. Utility processes require expensive upgrades that burden ratepayers, while operators lack an integrated system that coordinates DERs, V2G, local controllers, and utility signals to optimize grid impact and operational cost. In addition, fleet-charging sites increasingly depend on interconnected software and communications networks; failures or conflicts in these systems can compromise charging reliability, yet fleet operators lack tools for anticipating and mitigating such cyber-physical challenges.

Solution

This project deploys a complete AC-coupled microgrid at a school bus depot, including solar, EV buses, a UL 3141 PCS, and V2G chargers managed by a charge management system (CMS). It will also develop a digital twin of the depot before construction, enabling the team to simulate charging demand, solar production, dynamic import/export limits, communications dependencies and contingency scenarios. IEEE 2030.5 aggregator connectivity to PG&E's Flex Connect will enable use of DOEs (Dynamic Operating Envelopes) and curtailment signals to dynamically manage load within utility limits and test those control chains in the digital twin. This integrated system reduces peak grid load, avoids costly upgrades, increases EVSE uptime, supports reliable fleet operations during normal and constrained conditions, and demonstrates a replicable fleet-charging model aligned with California's electrification and DER-deployment goals.

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

- Demonstrate an operational DER-integrated commercial fleet charging microgrid.
- Validate UL 3141 PCS performance during daily charging operations.
- Develop and validate a digital twin of the depot microgrid and control architecture.
- Evaluate selected communications and control scenarios to improve site reliability and safe fallback operation.
- Participate in PG&E Flex Connect and respond to DOEs.
- Demonstrate V2G operation with school buses, including charge/discharge cycles.

Exhibit A Scope of Work EvGateway

- Reduce grid upgrade costs and energization timelines through DER integration.
- Improve EVSE reliability to >95% uptime.
- Enhance community and workforce understanding of resilient fleet-charging systems through accessible simulations and training materials.
- Provide public knowledge transfer and replicable frameworks.

Ratepayer Benefits:²

This project will result in the ratepayer benefits of greater electricity reliability, lower costs, and increased safety by demonstrating a commercial EV charging microgrid that reduces dependence on traditional distribution system upgrades while maintaining reliable EV charging operations. The project combines solar PV, AC-coupled battery energy storage, UL 3141-certified power controls, IEEE 2030.5 communications, and flexible service coordination with PG&E to operate within dynamic import limits and reduce peak demand impacts on the electric grid. By integrating DERs with managed EV charging, the project is expected to defer or avoid costly utility infrastructure upgrades, improve grid flexibility, and reduce overall system stress during peak demand periods.

The project will further benefit ratepayers by evaluating lower-cost pathways to commercial EV charging deployment compared to traditional Rule 29/45 energization approaches. Through 12 months of operational data collection, the project will quantify reductions in utility upgrade requirements, peak-load impacts, and delivered charging costs while maintaining targeted EVSE uptime of at least 95 percent. The use of renewable energy generation, battery storage, and certified power control systems will improve operational resiliency and safety while supporting California's transportation electrification and High-DER grid modernization objectives. Findings from the demonstration will provide scalable and replicable data that utilities, regulators, and commercial charging operators can use to reduce long-term infrastructure costs and improve reliability for future EV charging deployments.

This project demonstrates a technology advancement and innovation by integrating electric vehicle (EV) charging infrastructure and DERs into a coordinated, utility-interactive system capable of operating under dynamic utility constraints. The project advances the current state of practice by deploying a UL 3141-certified power control system, IEEE 2030.5 communications, and V2G-enabled fleet charging within a single AC-coupled architecture that responds to utility signals, enforces dynamic operating envelopes, and enables flexible load participation. This approach directly overcomes key barriers to achieving California's statutory energy goals—including distribution grid capacity constraints, long interconnection timelines, and high infrastructure upgrade costs—by enabling electrification under limited-load conditions without requiring immediate utility-side upgrades.

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

Exhibit A

Scope of Work

EvGateway

Breakthroughs^{3[OBJ]}

The project further advances technological knowledge by validating mobile energy storage (electric school buses) as a functional alternative to stationary battery systems and by applying Digital Twin–based simulation for system design, validation, and optimization prior to deployment. These innovations enable cost-effective DER integration, improve system reliability and performance, and support safe, scalable deployment in real-world conditions. By demonstrating a replicable, standards-based microgrid-integrated charging solution that increases renewable energy utilization, reduces peak load impacts, and supports flexible service participation, the project contributes directly to California’s statutory goals related to grid reliability, greenhouse gas reductions, and transportation electrification, while enabling broader statewide adoption of DER-integrated EV infrastructure.

Agreement Objectives

The objectives of this Agreement are to:

- Install solar PV, EV School Buses, V2G chargers, UL 3141 PCS and distribution equipment
- Deploy IEEE 2030.5 local and aggregator controllers.
- Establish PG&E Flex Connect participation.
- Collect 12 months of M&V data.
- Achieve 30–60% peak load reduction using DERs.
- Achieve $\geq 25\%$ of charging energy served by-site generation and storage.
- Publish a detailed case study and host training/webinars for industry partners.

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

Exhibit A

Scope of Work

EvGateway

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)-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:

Exhibit A Scope of Work EvGateway

- 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 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);

Exhibit A Scope of Work EvGateway

- 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 1.8) (*if applicable*)
- Permit Status Letter (subtask 1.9) (*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 should be made to the tasks, products, schedule, or budget. CPR meetings are a key opportunity for open and candid discussions between the CEC and the Recipient about project progress, challenges, and next steps. CPR meetings may also provide a forum for the Recipient to share project insights with interested CEC staff and CEC partners, at the CAM's discretion.

CPR meetings are typically scheduled at key inflection points in the project, as identified in the Task List on page 1 of this Exhibit. They should align with natural phase transitions, such as after design completion but before major procurement decisions, so that the CEC can make an informed Progress Determination based on project performance and risk. CPR meetings are generally conducted virtually but may be held at a project site, at the CEC, or another location, as determined by the CAM. Site visits are typical for demonstration projects or when in-person observation would enhance the CEC's understanding of project progress.

Exhibit A Scope of Work EvGateway

The CAM may schedule additional CPR meetings as needed to address emerging issues or concerns. The budget may be reallocated to cover the additional costs borne by the Recipient, but the overall Agreement amount will not increase.

The Recipient shall:

- Prepare and submit a *CPR Presentation* for each CPR meeting, structured to (1) report on progress with respect to the Scope of Work, budget, and schedule; identify any risks or needed changes to the Agreement; provide justification for continued funding; and (2) share project insights and progress towards achieving the Agreement's goals and objectives.
- Attend the CPR meeting and deliver the *CPR Presentation* and any other requested material, as outlined in the *CPR Agenda* provided by the CAM..

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. The *CPR Agenda* will outline the structure and expectations for the *CPR Presentation*..
- Conduct each CPR meeting.
- Issue a *Progress Determination* summarizing the meeting, stating whether the project will continue, and identifying any potential modifications to the Agreement or its products. The *Progress Determination* may include conditions that the Recipient must meet for the project to continue to receive CEC funding.

Recipient Products:

- CPR Presentation(s)

CAM Products:

- CPR Agenda(s)
- Progress Determination(s)

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.

Exhibit A Scope of Work EvGateway

- 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.

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 on items discussed during call to Recipient.

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:

Exhibit A Scope of Work EvGateway

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

Recipient Products:

- Quarterly Progress Reports
- Invoices

CAM Product:

- Invoice template

Subtask 1.7 Final Report

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, results, and conclusions of the work performed under this Agreement. 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**)

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- Table of Contents (**required**, followed by List of Figures and List of Tables, if needed)
- Executive summary (**required**)
- Body of the report (**required**)
- References (if applicable)
- Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)
- Submit a draft of the Executive Summary to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments on Draft Final Report* received on the Executive Summary. For each comment received, the Recipient will identify in the summary the following:
 - Comments the Recipient proposes to incorporate.
 - Comments the Recipient does not 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

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state this in the letter.

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

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

Products:

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

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.

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The list of permits and the schedule for obtaining them will be discussed at the Kick-off meeting (subtask 1.2), and a timetable for submitting the updated list, schedule, and copies of the permits will be developed. The impact on the project if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in progress reports and will be a topic at CPR meetings.

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

Products:

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

Subtask 1.10 Obtain and Execute Subawards and Agreements with Site Hosts

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

The Recipient shall:

- Execute and manage subawards and coordinate subrecipients activities in accordance with the requirements of this Agreement.
- Execute and manage site host agreements and ensure the right to use the project site throughout the term of the Agreement, as applicable. A site host agreement is not required if the Recipient is the site host.
- Notify the CEC in writing immediately, but no later than five calendar days, if there is a reasonable likelihood the project site cannot be acquired or can no longer be used for the project.
- Incorporate this Agreement by reference into each subaward.
- Include any required Energy Commission flow-down provisions in each subaward, in addition to a statement that the terms of this Agreement will prevail if they conflict with the subaward terms.
- Submit a *Subaward and Site Letter* to the CAM describing the subawards and any site host agreement needed or stating that no subawards or site host agreements are required.
- If requested by the CAM, submit a draft of each *Subaward* and any *Site Host Agreement* required to conduct the work under this Agreement.
- If requested by the CAM, submit a final copy of each executed *Subaward* and any *Site Host Agreement*.
- Notify and receive written approval from the CAM prior to adding any new subrecipient (see the terms regarding subrecipient additions in the terms and conditions).

Products:

- Subaward and Site Letter

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

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The Recipient shall:

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

Products:

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

Subtask 1.12 TAC Meetings

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

The Recipient shall:

- Discuss the TAC meeting schedule with the CAM at the Kick-off meeting. Determine the number and location of meetings (in-person and via teleconference) in consultation with the CAM.
- Prepare a *TAC Meeting Schedule* that will be presented to the TAC members during recruiting. Revise the schedule after the first TAC meeting to incorporate meeting comments.
- Prepare a *TAC Meeting Agenda* and *TAC Meeting Back-up Materials* for each TAC meeting.
- Organize and lead TAC meetings in accordance with the TAC Meeting Schedule. Changes to the schedule must be pre-approved in writing by the CAM.
- Prepare *TAC Meeting Summaries* for each TAC Meeting that include any recommended resolutions of major TAC issues.

The TAC shall:

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

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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 DEMONSTRATION SITE DEVELOPMENT

The goal of this task is to design, install, and commission the physical infrastructure required for the DER-integrated microgrid and fleet charging system at the school bus depot.

The Recipient shall:

- **Subtask 2.1 – Digital Twin Development:** Develop a full-scale digital twin of the school-bus depot, modelling the electrical system, communications network and control hierarchy. Use the model to test dynamic import/export limits, simulate grid scenarios and refine the site-design.
Product: *Site Digital Twin Package for Flexible Interconnections Report.*
- **Subtask 2.2 – Site Design & Engineering:** Conduct a full site-level electrical assessment, load study and design drawings; prepare single-line diagrams and installation plans for PV, PCS and V2G EVSE.
Product: *Site Design Package (draft and final).*
 - **Subtask 2.2.1 - Participate in CPR** per Subtask 1.3 and prepare *CPR Report #1*
 - **Product:** CPR Presentation #1
- **Subtask 2.3 – V2G Charger and EV Infrastructure Installation:** Procure and install bidirectional chargers, perform certification and make-ready checks and initial testing; install conduits, trenching, switchgear, BOS equipment and communications infrastructure.
Product: *Construction & Installation Report (draft and final).*
- **Subtask 2.4 – Solar PV and PCS Installation:** Install the solar canopy PV system and UL 3141 PCS; configure import limits, perform protection-coordination studies and commissioning; verify installation supports load-shifting and backup capability.
Products: *Solar PV, PCS and EV Installation & Test Report; PCS Commissioning Report.*
- **Subtask 2.5 – AB 841 / EVITP Compliance:** Submit the AB 841 certification (or document why it is not applicable) and provide EVITP certification numbers for all electricians installing the charging infrastructure.
Products: *AB 841 Certification; EVITP Certification Numbers.*
- **Subtask 2.6 – Integrated System Commissioning:** Conduct end-to-end commissioning of Flex Connect → PV → PCS → EVSE → School-bus interface; support communications and interoperability testing; incorporate test findings into final commissioning report.
Product: *Final Site Commissioning Report (draft and final).*

Products:

- Site Digital Twin Package for Flexible Interconnections Report
- Site Design Package (Draft And Final)
- Construction & Installation Report (Draft And Final)
- Solar PV, PCS and EV Installation & Test Report
- PCS Commissioning Report
- AB 841 Certification
- EVITP Certification Numbers
- Final Site Commissioning Report (Draft And Final)
- CPR Presentation #1

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TASK 3 UTILITY INTEGRATION & IEEE 2030.5 AGGREGATION

The goal of this task is to establish and validate utility-facing communication using the IEEE 2030.5 protocol and support PG&E Flex Connect participation.

The Recipient shall:

- **Subtask 3.1 – Cyber-Physical Digital Twin:** Update and refine the digital twin to reflect as-built specifications, test communication and control pathways and develop the end-to-end communications architecture for the depot.
Product: *Cyber-Physical Digital Twin of the Depot Performance Report.*
- **Subtask 3.2 – Aggregator Platform Deployment:** Deploy an IEEE 2030.5-certified CSIP aggregator platform; configure secure certificates, endpoint registration and DER group definitions; integrate with the UL 3141 PCS for Flex Connect operations.
Product: *Aggregator Integration Plan (Draft and Final).*
- **Subtask 3.3 – PG&E Flex Connect Integration:** Establish secure communications with PG&E Flex Connect; manage DOEs, curtailment signals and event windows; conduct integration testing in cooperation with PG&E engineers.
Product: *Utility DERMS Integration & Interconnection Report.*
 - **Subtask 3.3.1 - Participate in CPR** per Subtask 1.3 and prepare *CPR Report #2*
Product: CPR Presentation #2
- **Subtask 3.4 – Operational Signal Delivery:** Establish real-time signal communication (e.g. DOEs, pricing and VPP dispatch); log load-management events, DER commands and EVSE curtailments for later analysis.
Product: *Operational Signal Delivery Summary.*
- **Subtask 3.5 – Demonstration Support:** Troubleshoot interoperability issues during the demonstration period; participate in seasonal or peak-grid event simulations and provide logs of support activities.
Product: *Demonstration Period Support Log.*

Products:

- Cyber-Physical Digital Twin of the Depot Performance Report
- Aggregator Integration Plan with UL-3141 PCS (Draft and Final)
- Utility DERMS Integration & Interconnection Report
- Operational Signal Delivery Summary
- Demonstration Period Support Log
- CPR Presentation #2

TASK 4 CMS, LOCAL CONTROLLER DEPLOYMENT & OPTIMIZATION

The goal of this task is to deploy and operate the integrated charging management system (CMS), the IEEE 2030.5 local controller, and load optimization algorithms to manage fleet charging, DER orchestration, and V2G operations

The Recipient shall:

- **Subtask 4.1 – CMS Deployment:** Install and configure CMS for charger telemetry, energy management and fleet scheduling.
Product: *CMS Deployment Plan (Draft and Final).*

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- **Subtask 4.2 – Local Controller Installation:** Install the IEEE 2030.5-certified local controller and integrate it with the PCS, chargers, PV system and vehicles.
Product: *Local Controller Integration Report.*
- **Subtask 4.3 – Optimization Algorithms:** Develop and implement algorithms for DOE-based curtailment, DER optimization (PV + buses), V2G dispatch and peak-shaving/load-shifting; validate algorithm performance against fleet requirements and PCS limits.
Product: *Optimization Strategy & Test Plan (draft and final).*

Products:

- CMS Deployment Plan (Draft and Final)
- Local Controller Integration Report
- Optimization Strategy & Test Plan (draft and final)

TASK 5 – COMMUNITY BENEFITS, EDUCATION & ENGAGEMENT

The goal of this task is to ensure the project delivers measurable community benefits through meaningful engagement, education, resilience assessment and knowledge transfer that supports replication across California

The Recipient shall

- **Subtask 5.1 – Community Engagement Plan:** Review lessons from comparable projects; identify key stakeholders (community groups, schools, workforce organizations); develop a Community Engagement Plan reflecting community concerns and priorities. **Product:** *Community Engagement Plan.*
- **Subtask 5.2 – Community Advisory Committee (CAC):** Recruit a diverse, multigenerational, multilingual CAC; hold periodic meetings; document recommendations and responses. **Product:** *Community Advisory Committee Charter.*
- **Subtask 5.3 – Community & Youth Education:** Develop accessible educational materials; organize workshops on EV/V2G, clean energy, air quality and resilience; host limited site visits and provide periodic updates. **Product:** *Community Education & Project Awareness Materials.*
- **Subtask 5.4 – Indigenous Engagement:** Maintain relationship-first outreach and shared learning with the Association of Ramaytush Ohlone and other local tribal organizations; provide periodic updates respecting tribal knowledge. **Product:** *Indigenous Engagement Approach Memorandum.*
- **Subtask 5.5 – Community Outcomes & Measurement:** Collect feedback, track participation and resilience indicators; establish baseline and ongoing community metrics; prepare draft and final reports summarizing outcomes and lessons learned.
Products: *Community Outcomes Framework; Final Community Outcomes Report.*

Products

- Community Engagement Plan
- Community Advisory Committee Charter
- Community Education & Project Awareness Materials
- Indigenous Engagement Approach Memorandum
- Community Outcomes Framework
- Final Community Outcomes Report

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TASK 6 EVALUATION OF PROJECT BENEFITS

Goal: Report the benefits resulting from this project.

The Recipient shall:

- Complete the *Initial Project Benefits Questionnaire*. The Initial Project Benefits Questionnaire shall be 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* if requested by the CAM. The survey covers, but is not limited to the following topics, as applicable to the project:
 - Changes in energy consumption, utility bills, and emissions
 - Public and private funding
 - Demonstration and deployment beyond the project Community engagement
 - Improvements in codes and standards
- Confirm and revise survey responses as directed by the CAM.
- 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 benefits questionnaire drafts.
- Complete the project profile on the CEC's public online project on the [Energize Innovation website \(www.energizeinnovation.fund\)](http://www.energizeinnovation.fund), and provide *Documentation of Initial Project Profile on EnergizeInnovation.fund*, including the profile link, to the CAM.
- Address any edits or questions from the CAM regarding the Energize Innovation Project Profile content.
- If the 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, to the CAM.
- If the Recipient's organizational profile is changed, 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 an *Documentation of Updated Organization Profile on EnergizeInnovation.fund*, including the profile link, as needed.
- If the Recipient's project profile is changed, update the project profile on the CEC's public online project and recipient directory on the Energize Innovation website (www.energizeinnovation.fund), and provide *Documentation of Updated ([Year]) Project Profile on EnergizeInnovation.fund*, including the profile link, to the CAM.
- Address any edits or questions from the CAM regarding the Project Profile content.

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Products

- Initial Project Benefits Questionnaire
- Annual Survey(s)
- Final Project Benefits Questionnaire
- Documentation of Initial Project Profile on EnergizeInnovation.fund
- Documentation of Updated Organization Profile on EnergizeInnovation.fund (as needed)
- Documentation of Updated ([Year]) Project Profile on EnergizeInnovation.fund

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TASK 7- MEASUREMENT AND VERIFICATION OF 12 MONTH DATA

Goal: Measure, verify and report the performance of the behind-the-meter microgrid (Solar PV, V2G-enabled school buses, bidirectional chargers, UL 3141 PCS) over a continuous 12-month post-interconnection demonstration, capturing full seasonal variation to produce objective, replicable evidence for statewide replication.

The Recipient shall:

- **Subtask 7.1 – M&V Plan Development:** Refine performance metrics (e.g. peak-load reduction, renewable contribution, EVSE uptime, DOE compliance, avoided upgrades, bill savings, V2G export); agree on baseline values and targets with the TAC; prepare draft and final M&V Plan.
Products: *Draft M&V Plan; Final M&V Plan.*
- **Subtask 7.2 – Baseline Commissioning:** Commission data collection at PTO; validate telemetry, synchronize data streams and finalize counterfactual models for business-as-usual and flexible-service scenarios.
Product: *Baseline & Data-Collection Validation Summary*
- **Subtask 7.3 – Demonstration Monitoring & Quarterly Reports:** Monitor charging cycles; conduct controlled V2G discharge tests; compile quarterly datasets and summaries (Q1–Q4) highlighting DOE-compliance, import-limit enforcement and progress toward targets.
Product: *Quarterly Dataset & Summary (four deliverables).*
- **Subtask 7.4 – Final Analysis & Reporting:** Compare field results against the digital twin and counterfactual models; produce the Operations & Performance Report and Final M&V Report summarizing technical performance, ratepayer benefits and lessons learned.
Product: *M&V Report (Draft and Final).*

Products

- Draft M&V Plan; Final M&V Plan.
- Baseline & Data-Collection Validation Summary
- Quarterly Dataset & Summary (four deliverables).
- Operations and Performance Report
- M&V Report (Draft and Final).

TASK 8 TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES

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

The Recipient Shall:

- Develop and submit a *Project Case Study Plan* that outlines how the Recipient will document the planning, construction, commissioning, and operation of the technology or system being demonstrated. The Project Case Study Plan should include:
 - An outline of the objectives, goals, and activities of the case study.
 - The organization that will be conducting the case study and the plan for conducting it.

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- 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.