



California
ENERGY COMMISSION



**California Energy Commission
August 17, 2026 Business Meeting
Backup Materials for Mt. Diablo Unified School District (MDUSD)**

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: Mt. Diablo Unified School District (MDUSD)

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-26-005 with Mt. Diablo Unified School District (MDUSD) for a \$3,286,323 grant. Five dual-port DC fast chargers will be installed alongside MDUSD's existing EV supply equipment and integrated with a MW-scale UL 3141-certified PCS (developed under this project), stationary BESS, and a charge management hub. The project aims to demonstrate demand-responsive management of Mt. Diablo Unified School District's EV School Bus Charging Depot in PG&E's Flex Connect Pilot; 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-26-005

B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Sean Dory
3. MS-: None
4. Phone Number: 279-226-1062

C. Recipient's Information

1. Recipient's Legal Name: Mt. Diablo Unified School District

D. Title of Project

Title of project: Mt. Diablo Flexible Community Connection

E. Term and Amount

1. Start Date: 8/31/2026
2. End Date: 8/30/2030
3. Amount: \$3,286,323.00

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 8/12/2026
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name: Sean Dory
5. Time Needed for Business Meeting: N/A
6. The email subscription topic is: Enter the email subscription topic name

Project Description:

Mt. Diablo Unified School District. Proposed resolution approving agreement EPC-26-005 with Mt. Diablo Unified School District (MDUSD) for a \$3,286,323 grant and adopting staff's recommendation that this action is exempt from CEQA. The purpose of this agreement is to demonstrate demand-responsive management of Mt. Diablo Unified School District's EV School Bus Charging Depot in PG&E's FlexConnect Pilot. Five dual-port DC fast chargers will be installed alongside MDUSD's existing electric vehicle supply equipment and integrated with a MW-scale UL 3141-certified PCS (developed under this project), stationary BESS, and a charge management hub. (EPIC 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: 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: Cal. Code Regs., tit. 14, § 1530;

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

No

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

Cal. Code Regs., tit. 14, sec. 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 consists of installation of microgrid components and a solar canopy on existing structures at an existing transportation yard. In addition, the electric vehicle charging stations will be installed at locations that are already developed and paved. Therefore, the project falls within section 15303 and will not have a significant effect on the environment.

Cal. Code Regs., tit. 14, sect. 15304 provides that projects which consist of minor public or private alterations in the condition of land, water, and/or vegetation which do not involve removal of healthy, mature, scenic trees except for forestry and agricultural purposes are categorically exempt from the provisions of CEQA. This project involves only minor alterations to previously developed land, such as installing EV charging equipment, microgrid components, and a solar canopy on an existing transportation yard. These activities require only minor trenching and backfilling with full surface restoration, which is expressly exempt under sect;15304(f). The project does not remove mature trees, expand the facility footprint, or disturb wetlands, scenic areas, or other



sensitive environmental resources. As a result, the environmental impact is negligible, and the project is exempt from CEQA.

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

b) Agreement **IS NOT** exempt.

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

No

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

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

H. Is this project considered "Infrastructure"?

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
First Note Finance Inc	\$ 148,606	\$43,544
KYA SERVICES, LLC	\$ 2,493,246	\$730,504
BP Pulse Fleet North America Inc.	\$ 348,434	\$102,090
Mt. Diablo Education Foundation	\$ 164,328	\$71,154



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
Enphase Energy	\$86,036	\$25,350
TBD	\$0	\$20,000
TBD	\$3,861	\$4,138
Mt. Diablo Education Foundation	\$36,350	\$10,650
BP Pulse Fleet North America Inc.	\$540,196	\$158,274
TBD	\$79,483	\$23,297
Bockman & Woody	\$492,526	\$144,306
Energy Toolbase	\$905,141	\$265,200
YC+D Architecture	\$61,866	\$18,134

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	\$ 3,286,323

TOTAL Amount: \$ 3,286,323

R&D Program Area: ESB: Renewables

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: Melanie Koslow

Address: 1936 Carlotta Dr

City, State, Zip: Concord, CA 94519-1397

Phone: 925-682-8000

E-Mail: koslowm@mdusd.org

2. Recipient's Project Manager

Name: Melanie Koslow

Address: 1936 Carlotta Dr

City, State, Zip: Concord, CA 94519-1397

Phone: 925-682-8000

E-Mail: koslowm@mdusd.org

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



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

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

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

Agreement Manager: Sean Dory

Approval Date: 7/1/2026

Office Manager: Kevin Uy

Approval Date: 7/3/2026

Deputy Director: Kevin Uy for Jonah Steinbuck

Approval Date: 7/3/2026

Exhibit A
Scope of Work
Mt. Diablo Unified School District

I. TASK AND ACRONYM/TERM LISTS

A. Task List

Task #	CPR¹	Task Name
1		General Project Tasks
2		Enroll in PG&E Flex Connect Program and Site Prep
3		Community Engagement
4	X	Develop Measurement and Verification Plan (M&V Plan)
5	X	Hardware Installation and System Deployment
6		Perform System Commissioning and Demonstration Activities
7		Develop Technology/Knowledge Transfer Activities
8		Evaluation of Project Benefits

B. Acronym/Term List

Acronym/Term	Meaning
BESS	Battery Energy Storage System
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CMS	Charge Management System
CPR	Critical Project Review
CTE	Career and Technical Education
DCFC	DC Fast Charger
DER	Distributed Energy Resources
ETB	Energy Toolbase
EV	Electric Vehicle
MDEF	Mt. Diablo Education Foundation
MDUSD	Mt. Diablo Unified School District
M&V	Measurement and Verification
O&M	Operations and Maintenance
PCS	Power Control System
PG&E	Pacific Gas and Electric Co
TAC	Technical Advisory Committee
TT&RP	Technology Transfer and Replicability Plan

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

Mt. Diablo Unified School District

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

A. Purpose of Agreement

The purpose of this Agreement is to demonstrate demand-responsive management of a megawatt-scale electric vehicle (EV) school bus charging depot. This includes i) completing the development and certification of a megawatt-scale UL 3141 microinverter power control system interface, ii) integrating a renewable energy microgrid including solar photovoltaic (PV) and battery energy storage system (BESS) resources, iii) instituting a charge management hub and DC Fast Charger O&M program to manage uptime reliability of the EV charging infrastructure, iv) enrolling in PG&E's Flex Connect program to establish a flexible service connection and accommodate the site's capacity constraints, and v) developing a parallel Career and Technical Education (CTE) Pathway to facilitate study, innovation, technology transfer and replicability, by leveraging CTE student internships to facilitate the TT&RP.

Problem/ Solution Statement

Problem

California school districts must provide transportation of its students to and from school. Many California public school districts have embarked on the course of replacing their gasoline and diesel fueled school buses with Electric Vehicle (EV) School Buses. This is driven by increasing environmental and public health problems due to air emissions in California's metropolitan areas, and in disadvantaged area communities, in particular, including PM2.5, NOx, and Greenhouse gases. However, this environmental and public-health "solution" introduces another set of issues that needs to be carefully considered and managed.

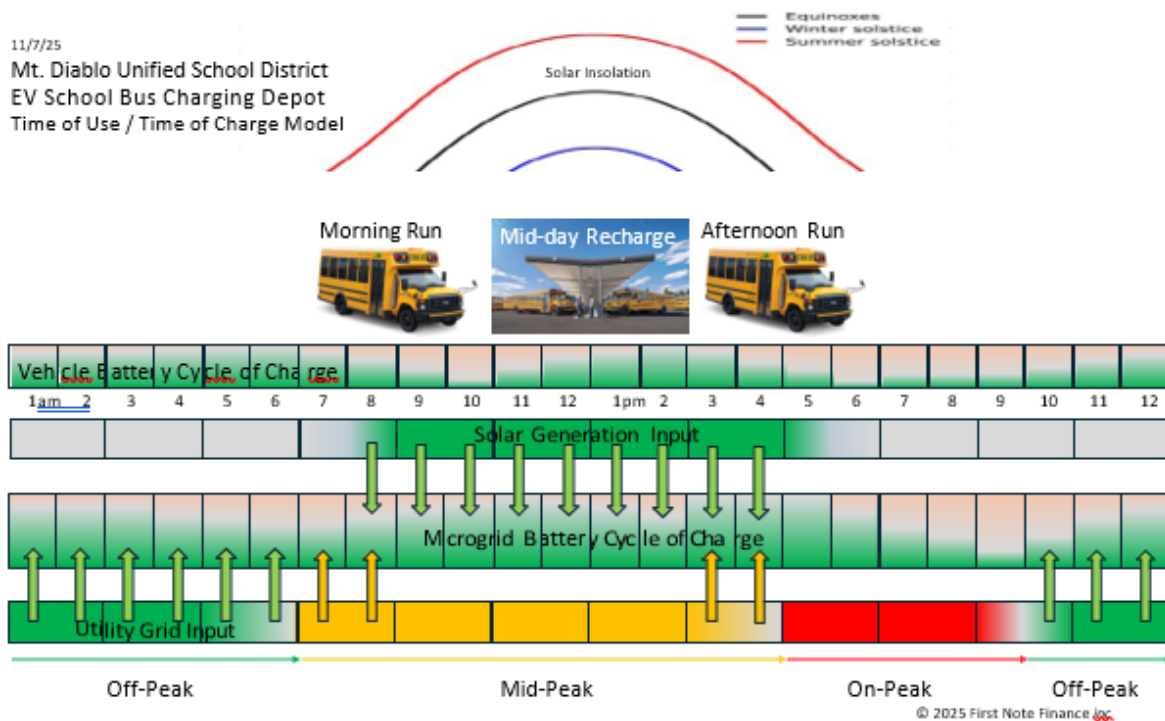


Exhibit A Scope of Work Mt. Diablo Unified School District

A unique aspect of operating EV school buses is that two daily charging cycles are required. The EV school buses are charged overnight for operating the morning route, transporting students from home to school. Before operating the afternoon route, for transporting students from school to their homes, the EV school buses need to be re-charged during the day, and charging dwell time is somewhat limited during the school day. While slow-charging can work overnight for the *Morning Run*, daytime charging requires fast-charging of the EV school buses to ensure fleet reliability in the *Afternoon Run*. As the school district adds more EV school buses to its fleet, the EV fleet's reliability runs up against predictable limits to growth, including Operations and Maintenance issues, and rising utility costs of operation.

- **O&M issues:** With DC Fast-Charging, there is considerably more heat that needs to be managed than with Level-2 charging. If left unmanaged, this excess heat can lead to premature DCFC equipment failures, which then can reduce electric school bus fleet uptime.
- **Utility Cost of Operations Issues:** Additionally, with DC Fast-Charging, utility demand-management becomes a crucial consideration. The time-of use utility cost of operating a 1.2 MW fleet charging operation, becomes extraordinarily expensive if adequate measures are not taken to automate electric charging schedules to meet time-of-use cost-limiting targets.

The ultimate success of transition to an EV School Bus fleet is naturally subject to these limits to growth unless the School District makes intelligent and deliberate decisions, and implements reliable strategies related to the O&M and Utility Cost Management approaches to managing its EV Fleet charging infrastructure.

Solution

This project will help achieve the State's statutory energy goals by demonstrating dependable hardware for EV charging depots and behind-the-meter microgrids as well as software that orchestrates and optimizes these systems. The demonstrated system will integrate advanced control and automation software essential to unlock the full value and performance of the underlying hardware and address the O&M and utility cost challenges that would otherwise limit fleet electrification.

The project will incorporate the following elements to address the problem:

- **Smart, demand-responsive fast charging** using vehicle telematics and advanced charge-management algorithms to minimize utility costs and support reliable fleet operations.
- **Advanced battery-storage microgrids and controls** that enable TOU cost savings, prevent unnecessary solar exports, and time-shift both solar and off-peak energy for on-peak fleet charging.
- **Utility-responsive power control via microinverter power control systems**, enabling two-way communication and real-time or day-ahead demand-response participation as well as flexible service connection responsiveness.

Exhibit A Scope of Work Mt. Diablo Unified School District

- **Integrated system control and data management platform** using API-based connections, with the central hub for data collection, validation, reporting, and standardized technology-transfer outputs.
- **A structured technology-transfer and workforce-development plan** leveraging automated reporting and incorporating high school CTE student interns in a Living Laboratory—expanding EV workforce opportunities in local disadvantaged communities.
- **A California-based, experienced design and construction team** ready to support rapid project deployment and completion.
- **An operations and maintenance strategy** to maximize fleet uptime and microgrid reliability.

B. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

- Showcase a megawatt-scale, three-phase, Microinverter Power Control System (PCS) to operational deployment, in alignment with the **PG&E Flex Connect** program;
- Install dual-port EVSE DC Fast Chargers to enable daily DC fast charging of EV school buses;
- Design and install a BTM microgrid in combination with the site's existing solar canopy, including a battery storage unit, with dispatchable microgrid controls and islanding capability, with API real-time data interface with the CMS hub.
- Install and integrate a sophisticated fleet and charge-management control system, in order to effectively manage utility time-of-use and demand-response objectives;
- Implement a robust Operations and Maintenance program designed to accomplish 98% uptime of the EV school bus fleet and EVSE Charging Depot.
- Align the project with the Mt. Diablo Unified School District through its fiscal agent, the Mt. Diablo Education Foundation, to establish a Career Technical Education (CTE) program pathway, creating a Living Laboratory of the EV transportation project, and coordinating operations with high-school student interns.

Exhibit A

Scope of Work

Mt. Diablo Unified School District

Ratepayer Benefits:² This Project Agreement will deliver overlapping ratepayer, energy, and non-energy benefits. Charge-management reduces peak-demand spikes and avoids costly grid upgrades, lowering long-term system costs for ratepayers. The renewable-powered battery microgrid stores solar energy and dispatches it during high-cost periods, reducing IOU procurement expenses and improving grid flexibility.

Energy Benefits. The proposed project delivers significant benefits to California IOU ratepayers by integrating onsite renewable generation, battery storage, and an advanced power control system to maximize clean, locally produced energy for fleet charging. The microgrid reduces annual electricity consumption (kWh) from the grid, lowers energy costs, avoids future ratepayer-funded infrastructure investment, and provides measurable peak-load reduction and load shifting. These capabilities improve both grid resiliency and reliability while advancing statewide clean-energy and GHG-reduction goals.

The system also enhances community reliability by maintaining essential student transportation during outages without relying on diesel backup generators, improving local air quality. Through managed charging and dispatchable storage, the project enables demand response and other grid-support services that stabilize the electric system and reduce costs to customers.

Non-Energy Benefits. Electrifying school buses provides added non-energy benefits, including improved air quality near schools, reduced health impacts, operational reliability, workforce development opportunities, and local economic benefits. Together, these integrated technologies create a cleaner, more resilient, and more cost-effective energy ecosystem for California IOU ratepayers.

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

Mt. Diablo Unified School District

Technological Advancement and Breakthroughs:³

PCS Technological Advancement. The project Agreement will foster the commercial deployment of a three-phase, megawatt-scale PCS with UL 3141 listing. The three-phase, megawatt-scale PCS will also embody a significant integration between Solar microinverters and Power Control System functionality for Flexible Service Connections. This integration will lead to rapid market deployment of Power Control System functionality, as it promises to equip most any commercial Solar PV system with utility-signal aware, behind the meter microgrid capabilities.

Emissions Reduction Focus. The CMS delivers transparency regarding quantifiable carbon dioxide (CO₂) emissions saved through electric vehicle use, facilitating accurate assessments of the carbon intensity of electric refueling. This quantifies the environmental benefits of electric fleet operations, providing clarity and reporting. Electrifying School Buses to zero-emissions is at the core of our project. This regional emission reduction strategy is a clear departure from conventional solutions that continue to rely on fossil fuels, making our project not only innovative but environmentally responsible, providing a competitive advantage.

Distributed Energy Resources. Enhanced grid stability, security, and resilience is met by integrating microgrid solutions, including renewable energy generation and battery energy storage (BESS). By introducing and integrating a renewable microgrid, we reinforce the stability and security of our charging operations, distinguishing us from traditional models reliant solely on grid power. This extra layer of grid support through distributed energy resources (DERs) ensures our charging operations are highly reliable and resilient.

Demand Response Optimization. The CMS site controller enables automated response to utility DR events and/or PCS commands, reducing peak load, lowering demand charges, and creating potential fleet revenue opportunities. This data-driven control approach ensures efficient charging schedules and minimized grid impact—advantages not available in traditional charging solutions lacking grid-interactive capabilities.

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

Mt. Diablo Unified School District

Agreement Objectives

The objectives of this Agreement are to:

- Develop and demonstrate a microgrid consisting of Solar PV, a battery energy storage system (BESS), integrated charge management and power control systems, and electric vehicle supply equipment (EVSE) supporting a fleet of electric school buses.
- Demonstrate operation of the system under PG&E's Flex Connect program, maintaining site demand within load limits while supporting increased vehicle charging throughput.
- Achieve 98% fleet uptime for all key system components, including the EV school bus fleet vehicles, solar/battery microgrid, and EVSE charging infrastructure.
- Conduct commercial viability analyses and tech transfer activities
- Collect, analyze, and report on 12 months of measurement and verification data

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.

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Scope of Work

Mt. Diablo Unified School District

For all products

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

Instructions for Submitting Electronic Files and Developing Software:

- **Electronic File Format**

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

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

- Data sets will be in MS Access or MS Excel file format (version 2007 or later), or any other format approved by the CAM.
- Text documents will be in MS Word file format, version 2007 or later.
- Project management documents will be in Microsoft Project file format, version 2007 or later.

- **Software Application Development**

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

- Microsoft ASP.NET framework (version 3.5 and up). Recommend 4.0.
- 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

Exhibit A Scope of Work

Mt. Diablo Unified School District

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

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

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

The CAM shall:

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

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

Exhibit A

Scope of Work

Mt. Diablo Unified School District

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.

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:

Exhibit A

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- 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.

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.

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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

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:

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- 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)
 - 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

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MATCH FUNDS, PERMITS, AND SUBAWARDS

Subtask 1.8 Match Funds

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

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

The Recipient shall:

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

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

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

Products:

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

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Subtask 1.9 Permits

The goal of this subtask is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track. Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement, with the exception of costs incurred by University of California recipients. Permits must be identified and obtained before the Recipient may incur any costs related to the use of the permit(s) for which the Recipient will request reimbursement.

The Recipient shall:

- Prepare a *Permit Status Letter* that documents the permits required to conduct this Agreement. If no permits are required at the start of this Agreement, then state this in the letter. If permits will be required during the course of the Agreement, provide in the letter:
 - A list of the permits that identifies: (1) the type of permit; and (2) the name, address, and telephone number of the permitting jurisdictions or lead agencies.
 - The schedule the Recipient will follow in applying for and obtaining the permits.

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

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

Products:

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

Subtask 1.10 Obtain and Execute Subawards and Agreements with Site Hosts

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

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addition to a statement that the terms of this Agreement will prevail if they conflict with the subaward terms.

- Submit a *Subaward and Site Letter* to the CAM describing the subawards and any site host agreement needed or stating that no subawards or site host agreements are required.
- If requested by the CAM, submit a draft of each *Subaward* and any *Site Host Agreement* required to conduct the work under this Agreement.
- If requested by the CAM, submit a final copy of each executed *Subaward* and any *Site Host Agreement*.
- Notify and receive written approval from the CAM prior to adding any new subrecipient (see the terms regarding subrecipient additions in the terms and conditions).

Products:

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

TECHNICAL ADVISORY COMMITTEE

Subtask 1.11 Technical Advisory Committee (TAC)

The goal of this subtask is to create an advisory committee for this Agreement. The TAC should be composed of diverse professionals. The composition will vary depending on interest, 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.

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The TAC may be composed of qualified professionals spanning the following types of disciplines:

- Researchers knowledgeable about the project subject matter;
- Members of trades that will apply the results of the project (e.g., designers, engineers, architects, contractors, and trade representatives);
- Public interest market transformation implementers;
- Product developers relevant to the project;
- U.S. Department of Energy research managers, or experts from other federal or state agencies relevant to the project;
- Public interest environmental groups;
- Utility representatives;
- Air district staff; and
- Members of relevant technical society committees.

The Recipient shall:

- Prepare a *List of Potential TAC Members* that includes the names, companies, physical and electronic addresses, and phone numbers of potential members. The list will be discussed at the Kick-off meeting, and a schedule for recruiting members and holding the first TAC meeting will be developed.
- Recruit TAC members. Ensure that each individual understands member obligations and the TAC meeting schedule developed in subtask 1.12.
- 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.

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The TAC shall:

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

Products:

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

Subtask 1.13 Project Performance Metrics

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

The Recipient shall:

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

Products:

- TAC Performance Metrics Summary
- Project Performance Metrics Results

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IV. TECHNICAL TASKS

TASK 2: ENROLLMENT IN PG&E FLEX CONNECT PROGRAM AND SITE PREP

The goal of this task is to enroll MDUSD, the grant recipient, in PG&E's Flex Connect program and complete all site development tasks necessary to complete site work to prepare for charging infrastructure installation in accordance with all safety and regulatory specifications.

The Recipient Shall:

- Complete an application to enroll MDUSD in PG&E's Flex Connect Program
- Finalize contract(s) with construction company(ies) and deliver *Copy(ies) of Contract(s) with Construction Company(ies), Subrecipients and Vendors.*
- Start permitting process, verify all necessary permits are received, and deliver *Copy(ies) of Permit(s).*
- Outline system design
 - Create simple single-line diagrams showing all hardware and the power/control electronics. Include the key voltage, current, and power ratings needed for the system.
 - List the sensors, meters, and protection devices required to ensure the system works safely and meets all relevant codes and standards.
 - Identify which communication standards and APIs the system will use.
 - Prepare a *System Architecture and Control Design Memo* that describes the full system architecture and control strategy.
- Issue *Purchase Orders for procurement of long-lead time equipment.*
 - Participate in CPR per Subtask 1.3 and prepare *CPR Presentation #1 (Draft and Final)*
- Complete all ground and electrical work and deliver *Photographs of Site Prep*
- Complete an onboarding presentation with key MDUSD project principals.
- Prepare a *Utility Flex Connection Report* for MDUSD Board of Education and California Energy Commission CAM that describes the details of the service agreement between MDUSD and PG&E's FlexConnect Pilot.

Products:

- Copy(ies) of Permit(s)
- Copy(ies) of Contract(s) with Construction Company(ies), Subrecipients, and Vendors.
- System Architecture and Control Design Memo
- CPR Presentation #1 (Draft and Final)
- Copy(ies) of Equipment Purchase Orders
- Utility Flex Connection Report

TASK 3: COMMUNITY ENGAGEMENT

The goal of this task is to develop and execute the community outreach and engagement efforts by the Mt. Diablo Education Foundation (MDEF). This will be designed to ensure a robust student internship program is developed in conjunction with a Career Technical Education (CTE) career pathway. Students will have internship opportunities with the MDUSD Transportation Department, working within a "Living Laboratory" The curriculum will give students hands-on exposure to real operational data and technologies central to smart cities and electrified transportation.

⁴ 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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The Recipient Shall:

- Develop an *Educational Program Plan and CTE Pathway Curriculum Document* that will integrate established CTE Pathways within MDUSD's Comprehensive High Schools with the opportunity for student interns to participate in the technology transfer activities (TT&RP) (see Task 7).
- Develop *Professional Development for CTE Pathway Teacher Materials* that will enable them to provide meaningful instruction and leadership for participating student interns.
- Identify **at least** one established CTE program pathway as a foundation upon which to develop a CTE Pathway Curriculum related to this project.
- Work with the identified educators to develop a three-year plan document to integrate student internships with the MDUSD Transportation Department over the course of the funded project.
- Develop a Community Outreach Program whereby students and their families may become aware of the opportunity for student participation in the funded program through paid internships with the MDUSD Transportation Dept.
- Work with all project participants to develop content channels that will become part of a Technology/Knowledge Transfer Website.

Products:

- Educational Program Plan and CTE Pathway Curriculum Document
- Professional Development for CTE Pathway Teacher Materials
- Technology/Knowledge Transfer Website

TASK 4: MEASUREMENT AND VERIFICATION

The goal of this task is to integrate a robust measurement and verification analysis process into the project so that the objective, quantifiable, benefits of developing an innovative Utility Flexible Connection System may be accurately measured, verified, and included in technology/knowledge transfer resources.

The Recipient Shall:

- Prepare and deliver a *Draft Measurement & Verification Plan* that outlines the performance metrics to quantify the benefits of the project. The plan will at minimum include:
 - Instrumentation and equipment required to collect verification data during the one-year M&V period, such as meters and other monitoring equipment.
 - Data acquisition criteria such as inputs, outputs, sampling rate, and accuracy.
 - An installation plan for any equipment that must be installed during construction.
 - The calculations necessary to quantify each of the designated metrics from the verification data for the scenarios described in the project narrative.
 - Any other metrics or measurements that are scientifically significant or worthy of calculation. This may include calculated values such as the average driven miles of the vehicles and other informative analyses.
 - Finalize and deliver *Final Measurement & Verification Plan* incorporating CAM feedback on *Draft Measurement and Verification Plan*
- Prior to measurement and verification, participate in CPR per Subtask 1.3 and prepare *CPR Presentation #2 (Draft and Final)*
- Conduct Measurement & Verification of the Site.
 - Execute the Measurement and Verification Plan for one year post-deployment.

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- Prepare and deliver a *Measurement and Verification Report* to document assessment results.
- Analyze, summarize, and deliver narrative on actual performance as compared to expected performance and targeted metrics.

Products:

- Measurement & Verification Plan (Draft And Final)
- Measurement & Verification Report (Draft And Final)
- CPR Presentation #2 (Draft and Final)

TASK 5: HARDWARE INSTALLATION AND SYSTEM DEPLOYMENT

The goal of this task is for the California licensed General Contractor and California licensed Electrical Subcontractor to install the DER resources that make up the Utility Flexible Connection System. An additional goal is for the project Vendors to collaborate on a systems integration to enable robust demand-response capabilities.

Electric Vehicle Charging Infrastructure Requirements:

Public Utilities Code (PUC) section 740.20 requires Electric Vehicle Infrastructure Training Program (EVITP) certification to install electric vehicle charging infrastructure and equipment that is funded or authorized, in whole or in part, by the CEC, subject to certain exceptions. Accordingly, all electric vehicle charging infrastructure and equipment located on the customer side of the electrical meter shall be installed by a contractor with the appropriate license classification, as determined by the Contractors' State License Board, and at least one electrician on each crew, at any given time, who holds an EVITP certification. Projects that include installation of a charging port supplying 25 kilowatts or more to a vehicle must have at least 25 percent of the total electricians working on the crew for the project, at any given time, who hold EVITP certification. One member of each crew may be both the contractor and an EVITP certified electrician. The requirements stated in this paragraph do not apply to any of the following:

- (1) Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility.
- (2) Electric vehicle charging infrastructure funded by moneys derived from credits generated from the Low Carbon Fuel Standard Program (Subarticle 7 (commencing with Section 95480) of Article 4 of Subchapter 10 of Chapter 1 of Division 3 of Title 17 of the California Code of Regulations).
- (3) Single-family home residential electric vehicle chargers that can use an existing 208/240-volt outlet.

The Recipient Shall:

- Procure charging hardware, battery storage resources, and microinverter power control system
- Install charging hardware, battery storage resources, and microinverter power control system
- Install enabling charge and energy management software
- Submit an *AB 841 Certification Summary* that certifies the project has complied with all AB 841 (2020) requirements as specified above or describes why the AB 841 requirements do not apply to the project. The certification shall be signed by Recipient's authorized representative.
- Submit *EVITP Certification numbers* of each Electric Vehicle Infrastructure Training

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Program certified electrician that installed electric vehicle charging infrastructure or equipment. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

- Direct the Power Control Systems (PCS) vendor to obtain a position in the UL 3141 certification process with Underwriters Laboratory at the earliest opportunity. Obtain *Documentation of the UL Certification Contract and Timeline*. Request bi-monthly progress updates by email.
- Deliver *Hardware Installation Report* including a copy of the professional engineer-stamped line drawing(s) of system configuration; photographs of charging hardware, photovoltaics, and battery storage; power control system; description of modular design; and charge management system and energy management system operation confirmation
- Perform Systems Integration to enable robust demand-response capabilities
- Deliver a post-construction as-built update to the 2.4 *Utility Flex Service Connection Systems Integration Report* that details as-built changes, improvements, or necessary omissions to the 2.4 Utility Flex Connection Report.

Products:

- AB 841 Certification Summary
- EVITP Certification Numbers
- Documentation of the PCS vendor's UL 3141 certification contract and timeline.
- Hardware Installation Report
- Utility Flexible Service Connection Systems Integration Report (Draft And Final)

TASK 6 PERFORM SYSTEM COMMISSIONING AND DEMONSTRATION ACTIVITIES

The goal of this task is to observe a structured system commissioning process to ensure that the installed DER systems are fully operable, integrated, and exhibit reliable functionality, before commencing on the one-year system measurement and verification period. Following M&V the system will then be re-commissioned to optimize system performance.

The Recipient Shall:

- Perform a comprehensive system commissioning of the fully integrated microgrid (including EVSE, PV, BESS, PCS, and site controller):
 - Test and verify points of strength and failure in the system integration design.
 - Confirm and begin flexible utility service paired with on-site microgrid
 - Deliver *System Deployment and Commissioning Report* to include at least a narrative of the steps taken and timing of the system validation and testing, equipment ordering process, and construction and commissioning (including approvals from IOU and AHJ) of system
- Perform systems re-commissioning following one-year measurement and verification period:
 - Address any remaining issues in the system integration design and correct them permanently in software and/or firmware.
 - Document improvements to system performance in the *System Recommissioning Memo*

Products:

- System Deployment and Commissioning Report
- System Recommissioning Memo

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TASK 7: DEVELOP TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES

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 shall include the following sections and content:
 - 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 (Mandatory Goal):

- Project Case Study Plan (Draft And Final)
- Summary Of TAC Comments Report
- Project Case Study (Draft And Final)
- High Quality Digital Photographs.

Exhibit A Scope of Work

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TASK 8: EVALUATE PROJECT BENEFITS

The mandatory 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:

- Project Benefits Questionnaire
- Annual Survey(S)
- Final Project Benefits Questionnaire
- Documentation Of Project Profile On ENERGIZEINNOVATION.FUND
- Documentation Of Organization Profile On ENERGIZEINNOVATION.FUND

V. PROJECT SCHEDULE

Please see the attached Excel spreadsheet.