~~Limit the response to~~ **~~30~~** ~~pages.~~ See the formatting ~~requirements~~ **recommendations** in Part III, Section A.

1. **Technical Merit and Need**
2. Provide a clear and concise description of the project goals and objectives for advancing ~~development and commercialization support of promising new energy innovations.~~ **deployment of Advanced Energy Communities.**
3. Explains how the proposed project will ~~support development and commercialization~~ ~~of~~ **demonstrate** technological advancements and breakthroughs that overcome barriers to achieving the state’s statutory energy goals.
4. Summarizes the current status of ~~the development and commercialization support available to innovators,~~ **regulatory structures and designs as it relates to the development of Advanced Energy Communities** and explains how the proposed project will advance, supplement, and/or replace current ~~support systems~~ **regulatory structures and designs**.
5. Justifies the need for EPIC funding, including an explanation of why the proposed work is not adequately supported by competitive or regulated markets, **and justifies how EPIC funds will be used to procure and deploy advanced energy products and practices.**
6. Discuss the degree to which the proposed work is feasible and achievable.
7. Provides a clear and complete response to each of the questions posed ~~on pp. 19 - 20 of the GFO Solicitation Manual.~~ **in section II.B.2 of this GFO.**
8. **Technical Approach**
9. Describe the technique, approach, and methods to be used in performing the work described in the Scope of Work. Highlight any outstanding features.
10. Describe how the tasks will be executed and coordinated with various participants and team members.
11. Identify and discuss factors critical for success, in addition to risks, barriers, and limitations. Provide a plan to address them.
12. Describe how the knowledge gained, experimental results, and lessons learned will be made available to the public and key decision-makers.
13. Include a complete Scope of Work and Project Schedule, as instructed in Attachments 6 and 6a.
14. Provides a clear and complete response to all subject areas identified ~~on pp. 20 - 21 of the GFO Solicitation Manual.~~ **in section II.B.2 of this GFO.**
15. ~~Describes how the proposal fits in with existing steps already taken by the local jurisdiction to meet the goals of existing state and regional climate and energy plans such as the California Climate Adaptation Planning Guide, and the Desert Renewable Energy Conservation Plan.~~
16. **Impacts and Benefits to California Ratepayers**
17. Explains how the proposed project will benefit California Investor-Owned Utility (IOU) ratepayers with respect to the EPIC goals of greater reliability, lower costs, and/or increased safety).
18. Provide clear, plausible and justifiable **quantitative** estimates of potential benefits to California IOU electricity ratepayers, including the following (as applicable): annual electricity and thermal savings (kilowatt-hours and therms), peak load reduction and/or shifting, energy cost reductions, greenhouse gas emission reductions, air emission reductions (e.g., oxides of nitrogen), and water use and/or cost reductions.
19. States the timeframe, assumptions, and calculations for the estimated benefits, and explain their reasonableness.
20. Identifies impacted market segments in California, including size and penetration or deployment rates, with underlying assumptions.
21. Discuss any **qualitative** or intangible benefits to California IOU electricity ratepayers, including the timeframe and assumptions.
22. Provide a cost-to-benefit analysis that compares project costs to anticipated benefits and including how costs and benefits will be calculated and quantified and the underlying assumptions.
23. **Team Qualifications, Capabilities and Resources**
24. Describe the organizational structure of the applicant and the project team. Include an organizational chart that illustrates the structure.
25. Identify key team members, including the project manager and principal investigator.

*Include this information in Attachment 5, Project Team Form.*

1. Summarize the qualifications, experience, capabilities, and credentials of the key team members.

*Include this information in Attachment 5, Project Team Form*.

1. Explain how the various tasks will be managed and coordinated, and how the project manager’s technical expertise will support the effective management and coordination of all projects in the application.
2. Describe the facilities, infrastructure, and resources available to the team.
3. Describe the team’s history of successfully completing projects (e.g., RD&D projects) and commercializing and/or deploying results/products.
4. Identify past projects that resulted in a market-ready technology.

*Include this information in Attachment 9, Reference and Work Product Form*.

1. Provide references that are relevant to the proposed project and are current, meaning within the past three years.

*Include references in Attachment 9, Reference and Work Product Form*.

1. Identify any collaboration with utilities, industries, or others. Explain the nature of the collaboration and what each collaborator will contribute.
2. Respond to the following questions. Include an explanation for any “yes” answer:
   * Has your organization been involved in a lawsuit or government investigation within the past five years?
   * Does your organization have overdue taxes?
   * Has your organization ever filed for or does it plan to file for bankruptcy?
   * Has any party that entered into an agreement with your organization terminated it, and if so for what reason?
   * For Energy Commission agreements listed in the application that were executed (i.e., approved at a Commission business meeting and signed by both parties) within the past five years, has your organization ever failed to provide a final report by the due date indicated in the agreement?
3. Commitment and support letters*.*

*See Attachment 11 Commitment and Support Letters Form.*

1. **Budget and Cost Effectiveness**
2. Budget forms are complete, as instructed in Attachment 7.
3. Justify the reasonableness of the requested EPIC funds relative to the project goals, objectives, and tasks.
4. Justify the reasonableness of costs for direct labor, non-labor (e.g., indirect overhead and general and administrative costs, and subcontractor profit), and operating expenses by task.
5. Explain why the hours proposed for personnel and subcontractors are reasonable to accomplish the activities in the Scope of Work (Attachment 6).
6. Explain how the applicant will maximize funds for technical tasks and minimize expenditure of funds for program administration and overhead.
7. **Funds Spent in California**

“Spent in California” means that: (1) Funds under the “Direct Labor” category and all categories calculated based on direct labor in the B-4 budget attachments (Prime and Subcontractor Labor Rates) are paid to individuals who pay California state income taxes on wages received for work performed under the agreement; and (2) Business transactions (e.g., material and equipment purchases, leases, rentals, and contractual work) are entered into with a business located in California.

Airline ticket purchases and payments made to out-of-state workers are not considered funds “spent in California.” However, funds spent by out-of-state workers in California (e.g., hotel and food) are considered funds “spent in California.”

*Include this information in Tab B-2 of Attachment 7, Budget Forms.*

1. **Ratio of Unloaded Labor Rates to Loaded Labor Rates**

The Rates Summary worksheet (Tab B-7) in the budget forms compares the weighted direct labor and fringe benefits rate to the weighted loaded rate. This ratio, as a percentage, is multiplied by the possible points for this criterion.

*Include this information in Tab B-7 of Attachment 7, Budget Forms.*

1. **Match Funding** ~~(Match funding is not required for this solicitation. However, applications that include match funds will receive additional points during the scoring phase.)~~

**Match funding is required in the amount of at least 50% of the requested EPIC funds for Phase II. However, applications that include match funds in excess of the 50% minimum will receive additional points during the scoring phase.**

* 1. Each applicant must submit a match funding commitment letter that meets the requirements of Attachment 11. Failure to meet these requirements will disqualify the proposal from consideration for match funding points.
  2. Any match funding pledged in Attachment 1 must be consistent with the amount or dollar value described in the commitment letter(s) (e.g., if $5,000 “cash in hand” funds are pledged in a commitment letter, Attachment 1 must match this amount). Only the amount pledged in the commitment letter(s) will be considered.