See the formatting recommendations in Part III, Section A.

The Project Narrative must respond to each sub-criterion below.

**Technical Merit**

1. The proposed project provides a clear and concise description of the technological, scientific knowledge advancement, and/or innovation that will overcome barriers to achieving the State’s statutory energy goals.
2. Describe how the proposed model/tool/study will be used by key stakeholders (e.g. policymakers, project developers, other researchers, etc.).
3. Describes the advantage of the proposed model/tool/study over that currently being used by key stakeholders.
4. Describe how the proposed model/tool/study will be used by key stakeholders (e.g., policymakers, project developers, other researchers, etc.)
5. Describes the advantage of the proposed model/tool/study over that currently being used by key stakeholders.
6. Provides information described in Section I.C

**Technical Approach**

1. Proposal describes the technique, approach, and methods to be used in performing the work described in the Scope of Work
2. The Scope of Work identifies goals, objectives, and deliverables, details the work to be performed, and aligns with the information presented in Project Narrative.
3. Proposal identifies the reliability that the project and site recommendations as described will be carried out if funds are awarded.
4. Identifies and discusses factors critical for success, in addition to risks, barriers, and limitations (e.g. loss of demonstration site, key subcontractor). Provides a plan to address them.
5. Discusses the degree to which the proposed work is technically feasible and achievable within the proposed project schedule and the key activities schedule in Section I.E.

Describes the knowledge transfer plan, including how key stakeholders and potential users will be engaged, and the plan to disseminate knowledge of the project’s results to those stakeholders and users.

**Impacts and Benefits to California IOU Ratepayers**

1. Explains how the proposed project will benefit California Investor-Owned Utility (IOU) ratepayers and provides clear, plausible, and justifiable (quantitative preferred) potential benefits. Estimates the energy benefits including:

States the timeframe, assumptions with sources, and calculations for the estimated benefits, and explains their reasonableness. Include baseline or “business as usual” over timeframe.

1. Explains the path-to-market strategy including near-term (i.e., initial target markets), mid-term, and long-term markets for the technology, size and penetration or deployment rates, and underlying assumptions.
2. Identifies how outputs of the model/tool/study will benefit key stakeholders (e.g., streamline planning, help eliminate barriers, stimulate growth of applicable market sectors)

**Team Qualifications, Capabilities and Resources**

1. Identifies credentials of prime and any subcontractor core personnel, including the project manager and principal investigator *(include this information in Attachment 5, Project Team Form).*
2. Demonstrates that the project team has appropriate qualifications, experience, financial stability, and capability to complete the project.
3. Explains the team structure and how various tasks will be managed and coordinated.

*Include an organization chart similar to the one below*

**Figure X: Organization Chart**

1. Describes the facilities, infrastructure, and resources available that directly support the project.
2. Describes the team’s history of successfully completing projects in the past 10 years including subsequent deployments and commercialization.

**Budget and Cost Effectiveness**

1. Budget forms are complete for the applicant and all subcontractors, as instructed in Budget Attachment.  
     
   *Provide a budget by tasks, such as:*

**Table X: Task Budget**

| **Task (by major task)** | **Energy Commission Funds** | **Match Share** | **Total** |
| --- | --- | --- | --- |
| Task 1: General Project Tasks |  |  |  |
| Task 2: |  |  |  |
| Task [TBD-1]: Evaluation of Project Benefits |  |  |  |
| Task [TBD-2]: Technology/ Knowledge Transfer Activities \* |  |  |  |

\* **Requires 5% of total CEC funds**

1. Justifies the reasonableness of the requested funds relative to the project goals, objectives, and tasks.
2. Justifies the reasonableness of direct costs (e.g., labor, fringe benefits, equipment, materials & misc. travel, and subcontractors).
3. Justifies the reasonableness of indirect costs (e.g., overhead, facility charges (e.g., rent, utilities), burdens, subcontractor profit, and other like costs).

**Funds Spent in California**

This project proposes to spend $\_\_\_\_\_\_\_\_\_ of Energy Commission funds in California.