Attachment C
Instructions for the Scope of Work

The Scope of Work Template contains the framework to use to complete the Scope of Work. The template has instructions in blue type within < > that are to be deleted as it is filled out. The following are additional instructions for the items in the Scope of Work. At the end of these instructions, there are examples of Technical Tasks to provide guidance in drafting your own.

I. Technical Task List

Insert the Task numbers and Task names for the project. Put an "X" in the CPR column next to the Tasks that contain a Critical Project Review. Add additional rows as necessary.

II. Key Name List

List key parties within the agreement as described below. See Terms and Conditions for more information regarding key parties within the agreement.

> ***Key Personnel*** are employees or consultants who are critical to the outcome of the project and are being paid with Energy Commission funds. Key Personnel have expertise in the project field or experience that is not available from another source. Replacing these individuals may be difficult due to their expertise and may affect the outcome of the project. Since key personnel can come from various organizations working on the agreement, they should be written as follows to avoid confusion: “John Smith – Acme Company”
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> ***Key Subcontractors*** are contractors, subcontractors, or vendors who are critical to the outcome of the project and are being paid with Energy Commission funds. Key Subcontractors have expertise in the project field or experience that is not available from another source. Replacing these individuals may be difficult due to their expertise and may affect the outcome of the project.
>
> ***Key Partners*** are participants in the Project who are not receiving Energy Commission funds and are not providing Match Funds but are integral to the outcome of the Project. Key Partners may be providing space, testing facilities, demonstration sites or may be a manufacturer or other implementer of the Project results. Individual key employees from the Key Partner organizations are listed under “Key Personnel.” “Key Partners” are company names.

III. Glossary

Spell out each acronym used in the Scope of Work. Also include definitions of odd or unusual terms. Think about the document from the perspective of someone who does not work in the particular industry or discipline.

IV. Problem Statement

Describe the problem that this activity and funding will address in one to two paragraphs maximum.

Identify and discuss the principal barriers, key unresolved issues, and knowledge gaps that hinder the development and widespread use of the resource or the products of the proposed project in California. Barriers may be grouped under the following categories, or other categories that the Applicant deems appropriate:

- Scientific and technological – such as insufficient scientific understanding of relevant phenomena and processes, inadequate data acquisition technologies, low reliability, low power density, low energy density, lack of detailed engineering designs and design trade-off analyses, inadequate component development, high cost of fabrication techniques, insufficient field testing, or insufficient field demonstrations.

- Market – such as inadequate consumer knowledge or limited system supply and maintenance infrastructure.

- Institutional – such as regulatory hurdles (e.g., atmospheric emission limitations) or lack of adopted standards.

- Environmental – such as H_2S emissions, excessive noise, or ground water contamination.

- Cost and financial hurdles – such as costs of materials and operations and access to capital.

Explain why these barriers have not been addressed by the marketplace or by other institutions.

Explain why the barriers should be addressed at this time. For example, place the proposed work into the context of the spectrum of barriers to widespread deployment and adoption.

V. Goal of the Agreement

At the beginning of this section, complete the following sentence. Please be succinct.

The goal of this project is to … *<Complete the sentence with a brief description of the general goal(s) of the project and how the goal(s) will be met. Goals can be technical, economic or social. Please be brief, two to three sentences maximum.>*

VI. Objectives of the Agreement

The objectives of this project are to … *<Complete this sentence with the objectives, which are things that will be measurable or knowable at the end of **this** project.>*

List and describe technical or economic objectives, or desired conditions outside the project itself that will result from the success of the project.

VII. Task 1.0 Administration

The administrative tasks must be included in every agreement and the language does not change. Do NOT change anything in the administrative tasks.

VIII. Technical Tasks (Tasks 2 and up)

This is the area in the Scope of Work where the technical work to be performed under this Agreement is set forth. The work effort should be divided into a series of logical, discrete and sequential tasks. Each task has the following components:

- Task Name
- The goal of this task is to ...
- The Recipient shall:
- Products

A. The Goal

The goal of this task is to ... *<Complete the sentence with a brief description of the goal(s). Please be brief, two to three sentences maximum.>*

B. The Recipient shall …

List each individual **activity** with a separate bullet if there are more than two individual activities and begin each bullet with a verb to complete the sentence beginning with "The Recipient shall." Organize activities in the order in which they will occur. Use this section to describe the essential elements of the process you will use to complete the project. The contents of each product shall also be described in this section.

C. Products:

Product(s):

- *<Insert 1st product (name only)>*
- *<Insert 2nd product (name only)>*

Only the names of each product shall appear in the “Products” section. Use exactly the same name to identify a product (report, data set, project plan, etc.) in the activity and in the list of products.

Products incorporate the knowledge and understanding gained by performing the activities, and are submitted to the Energy Commission for review, comment and

approval. Products include, but are not limited to, written reports that describe methods, test plans, results of testing, analysis of data, conclusions, and recommendations for future study, workshop agendas and summaries, description and photographs of equipment/product developed, summaries of advisory group meetings, computer software with written instructions for data input and use of the software, if intended for public or Energy Commission use, and production prototypes. The summaries of the Products should be sufficiently detailed to be of use to stakeholders and other researchers. The level of detail should be sufficient for an observer to assess whether the project objectives and goals have been successfully met.

***[The technical tasks shown below are examples, which you may modify for use in your project. You may modify the tasks to fit your project, but please adhere to the patterns shown*.]**

TASK 2 - Production Line Manufacturing and Performance Testing

The goal of this task is to prepare the building for all tooling and manufacturing line build out, install the tooling for the manufacturing line, and use the installed manufacturing line to produce a complete vehicle or vehicle components.

The Recipient shall:

- Make necessary building facility modifications to support the installation of manufacturing equipment.
- Manage the tooling installation, work flow logistics, software installation, and asset management systems.
- Install engineering systems management.
- Install tooling.
- Install asset management systems and software.
- Establish production line protocol.
- Produce alternative technology vehicles from the manufacturing line and test performance of assembly line and protocol compliance.
- Order and procure the necessary equipment and materials for establishment of the manufacturing line.
- Prepare and submit a Task 2 Report, including facility layout plan, descriptions of the tooling and equipment installations, production line protocol, and the ability of the assembly line to produce vehicles in compliance with the protocol.

Products:

- Task 2 Report