

APPENDIX A

STATEMENT OF WORK

"ETIPP Cohort 5 Strategic Energy Planning Track Community Support"

September 30, 2025

1.0 BACKGROUND

NRL is the U.S. Department of Energy's primary national laboratory for energy systems research and development. As the energy systems laboratory, NRL's unique strength lies in developing and integrating a broad array of energy technologies into robust, resilient systems - bridging foundational research with practical applications to lower energy costs, drive economic growth, bolster national security, and deliver abundant and reliable energy.

The Energy Technology Innovation (ETI) initiative, led by the DOE, offers technical assistance, planning resources, tools, and training to help communities within the U.S. and its territories achieve energy goals related to local resource reliance; institutional, social, and economic resilience; enhanced institutional capacity, and lower energy costs. Through ETI, the DOE and its partners work with government entities and other stakeholders to support energy growth for island and remote communities through partnerships and collaboration. ETI serves as an umbrella program that provides research to support the Energy Technology Innovation Partnership Project (ETIPP). NRL is the administrator of this program across DOE Office of Critical Minerals and Energy Innovation (CMEI) technology programs. NLR provides overall programmatic structure, implementation, and interaction with the DOE.

ETIPP is a congressionally mandated, community-led technical support program for remote coastal and island communities to develop more affordable, reliable, and secure energy systems through strategic energy planning and deep-dive technical assistance. There are two different ETIPP tracks communities may follow: Strategic Energy Planning and Technical Deep Dive.

The Strategic Energy Planning Track is designed for communities to follow a streamlined process that results in a roadmap outlining near- and long-term energy goals. The resulting plan and goals will be informed by ongoing engagement, workshops, and meetings with partners and community representatives. Each ETIPP community in the Strategic Energy Planning Track is provided funding to help support participation in meetings, provide informed feedback, support community member participation in technical assistance, procure consultant support, and/or buy equipment or infrastructure to work toward a final Strategic Energy Plan.

2.0 OBJECTIVE

The objective of this work effort is to partner with a ETIPP Cohort 5 Strategic Energy Planning Track community to support and engage community participation throughout the technical assistance effort including development and execution of a Strategic Energy Plan through final delivery and closeout.

3.0 SCOPE OF WORK

To meet the objective, the scope of the work the Subcontractor shall perform entails the following:

- 3.1 The Subcontractor shall participate in development of the community Strategic Energy Plan.
- 3.2 The Subcontractor shall engage with the national laboratory ETIPP team and their ETIPP Regional Partner in coordinating and leading community engagement efforts, including workshops in the community.
- 3.3 The Subcontractor shall introduce the national laboratory ETIPP team and their ETIPP Regional Partner to local organizations as necessary (e.g., utility contacts, partner organizations).
- 3.4 The Subcontractor shall provide responses to questionnaires to inform NLR of their energy knowledge, identify supportive training to fill in knowledge gaps, and provide feedback and lessons learned to the national laboratory ETIPP team about the program as requested.

4.0 TASKS

- 4.1 Task 1: Feedback – The Subcontractor shall provide feedback to NLR regarding current energy knowledge, training needs, feedback on programming, etc. as requested.
- 4.2 Task 2: Community Events – The Subcontractor shall co-host in-person events (e.g., in-person workshops) to gather feedback on the energy vision, community strengths and challenges, and focus areas that will inform the community's energy plan; brainstorm potential projects and draft initial goals reflective of the community's values; engage with local organizations and community representatives as a part of these events to consider their input in the plan; and perform any other actions that will help gather data toward the Strategic Energy Plan. The Subcontractor shall ensure key community stakeholders are present.
- 4.3 Task 3: Strategic Energy Plan – The Subcontractor shall provide input to drafts of the Strategic Energy Plan developed by the NLR ETIPP team and review/approve the final plan before delivering it to NLR.
- 4.4 Task 4: Closeout – The Subcontractor shall complete and submit a short questionnaire regarding lessons learned and provide closeout points of contact to the Regional Partner and Regional Lead.

5.0 REVIEW MEETINGS AND TRAVEL REQUIREMENTS

Local travel is required to attend in-person workshops.

- Workshop #1
 - Location: Within the Subcontractor's community
 - Participants: National Laboratory Technical Lead, Regional Partner, Community Energy Stakeholders

6.0 DELIVERABLES

The Subcontractor shall provide the following deliverables by the due date as indicated:

Deliverable No.	Associated Task(s) No.	Deliverable Description	Due Date
6.1	4.1	Reporting: The Subcontractor shall complete and submit a short questionnaire to rank Subcontractor knowledge of their energy system and identify additional training topics that would be relevant and supportive to the community.	Six (6) months following community kickoff meeting.
6.2	4.2	In-Person Workshop: Following the in-person workshop, the Subcontractor shall deliver an attendee list for all community members that participated and a short summary (max of one [1] page) of key takeaways from the discussion.	Six (6) months following community kickoff meeting.
6.3	4.3	Final Strategic Energy Plan: The Subcontractor shall submit a final energy plan to NLR.	10/31/26
6.4	4.4	Closeout: The Subcontractor shall complete and submit a short questionnaire to rank Subcontractor knowledge of their energy system and provide closeout points of contact to the Regional Partner and Regional Lead.	10/31/26

DELIVERABLE ADDRESS:

The Subcontractor shall clearly label all deliverables to include:

- The subcontractor's name
- NLR's subcontract number
- NLR Technical Monitor's name
- Deliverable date, and
- Deliverable description.

Electronic deliverables shall be sent via email to the Technical Monitor as follows:

Kelly O'Toole-Leonard, Technical Monitor

e-mail: Kelly.OTooleLeonard@nrel.gov

- One (1) master electronic version, including graphics

DELIVERY OF DATA

A copy of all data (as that term is defined in this Subcontract) first produced in the performance of this Subcontract is an additional deliverable of this Subcontract and shall be provided to the technical monitor as a condition of final payment, in accordance with the Subcontract. **For all deliverables, make particular note of the requirements provided in the Rights in Data clause of this Subcontract regarding data not first produced in the performance of this Subcontract.**

7.0 ELECTRONIC REPORTING REQUIREMENTS FOR SUBCONTRACT REPORT DELIVERABLES

It is NLR's intention to publish subcontract report deliverables containing publicly available information (e.g. non-confidential, non-protected, non-proprietary information) for distribution on the internet.

The subcontractor shall provide the final approved version of report deliverables in accordance with the electronic reporting requirements described below.

The technical monitor may specifically direct the subcontractor to provide reports in one or more of the file format standards provided below:

- 7.1 The subcontractor shall submit all report deliverables (including status, annual, or final reports) as electronic files in Adobe .pdf format, preferably with all graphics and images embedded within the document.
- 7.2 All final approved version submissions shall be delivered to NLR via e-mail to the NLR Technical Monitor.
- 7.3 If it is not possible to include all of the graphics and images (figures, illustrations, and photographs) in the same file as the text, NLR will accept the text in Adobe .pdf formats and the graphics and images as separate electronic graphic or image files*.

The accepted standard for page layout and graphics is the Adobe Creative Suite of programs.

*The acceptable graphic or image file formats are: .eps, .tif, .gif, .jpg, .wmf, .emf, .pct, .png, .bmp, .psd, .ai, .fh, .qif, .fpx, cdr. The preferred resolution for graphics or images is 300 dpi. Include all fonts used in creating the file.

- 7.4 For animation, video, or multi-media elements, CD-ROM, DVR and thumb drive are acceptable technical deliverable media.
- 7.5 For all calculations in support of subcontract reports that are conducted in ASPEN+, an electronic copy of INPUT, REPORT and BACKUP (if Model Manager is used) must be submitted with all reports. Additionally, if costing or sizing calculations are conducted in a spreadsheet [no process calculations (heat and material balances) in spreadsheet format are permitted], a copy of the fully documented MS Excel file shall be supplied.

7.6 A fully executed model release shall be supplied to NLR with all photographs and images, regardless of whether such photographs or images are delivered to NLR electronically or in hard copy. Such model release shall certify that the Alliance for Sustainable Energy, LLC, Management and Operating Contractor for the National Laboratory of the Rockies for the U.S. Department of Energy is granted a non-exclusive, paid-up, irrevocable, worldwide license to publish such photographs in any medium or reproduce such photographs or allow others to do so for United States Government purposes. Model releases are required in all situations in which a reasonable person would respond in the affirmative to the question – could someone, other than the model himself/herself, recognize the person in this photograph or image? All model releases shall be provided to the subcontract associate as a condition of final payment, in accordance with the subcontract. To obtain a Subcontractor Model Release form, please contact images@nrel.gov.

8.0 ACKNOWLEDGEMENTS IN SUBCONTRACTOR PUBLICATIONS

In any scientific or technical report or article, conference paper, journal article, etc. based on or containing data first produced in the performance of this subcontract and published in academic, technical or professional journals, symposia proceedings or similar works, the subcontractor shall use this acknowledgement stating, "This [article, conference paper, journal article, etc.] was developed based upon funding from the National Laboratory of the Rockies for the U.S. Department of Energy under Contract No. DE-AC36-08GO28308."

9.0 COPYRIGHT PERMISSION/AUTHORIZATIONS

The subcontractor is responsible for obtaining copyright permissions and/or authorizations for all information and/or data, as applicable that is incorporated into all final technical reports. Electronic copies of these copyright permissions and/or authorizations shall be provided to the at the email address provided below. The subcontractor shall also provide a written certification to the Technical Monitor as to such permissions and/or authorizations as a condition of final payment. The subcontractor's (including all lower tier subcontractors, as applicable) certification shall specify that "I have obtained all necessary and legally required copyright permissions and/or authorizations for any and all information, data, graphs, images, etc., as applicable, that is incorporated into the final Technical Report titled _____, delivered under this Subcontract No. _____. Copies of these permissions and/or authorizations are attached."