

Project Management: Scope of Work Template

Licensed Under Creative Commons Attribution-NonCommercial 4.0 International

This template is licensed under a Creative Commons Attribution-NonCommercial 4.0 International License (CC BY-NC 4.0).

You are free to:

- **Share** — copy and redistribute the material in any medium or format.
- **Adapt** — remix, transform, and build upon the material.

Under the following terms:

- **Attribution (BY):** Credit must be given to Beacon Climate Innovations LLC, T.R.U.E Collective
- **NonCommercial (NC):** Only noncommercial use of this material is permitted. Noncommercial means not primarily intended for or directed toward commercial advantage or monetary compensation.

Learn more: <https://creativecommons.org/licenses/by-nc/4.0/>

BY: Credit must be given to Beacon Climate Innovations LLC, T.R.U.E Collective

NC: Only noncommercial use of your work is permitted.

About: This document serves as a template to help organizations plan and implement engineering and design services for community-based Clean Energy Resilience Hubs. It outlines key tasks, deliverables, and payment milestones associated with deploying distributed energy resources, such as solar photovoltaics and battery energy storage systems.

Usage Description: This template can be followed to create a unique Scope of Work document for a CCRH Project.



Scope of Work for Clean Energy Resilience Hubs Template

Objective:

This document serves as a template to help organizations plan and implement engineering and design services for community-based Clean Energy Resilience Hubs. It outlines key tasks, deliverables, and payment milestones associated with deploying distributed energy resources, such as solar photovoltaics and battery energy storage systems.

Section 1: Project Setup:

➤ **1.1 Project Summary**

- Project Name: [Insert Project Title]
- Location: [Insert Address or Neighborhood]
- Facility Description: [ex. 6,000 sq ft retrofitted community center]
- End Use: Community space, training center, afterschool programs, etc.

➤ **1.2 Project Goals (Example)**

- “Achieve annual carbon net-zero”
- “Ensure 72-hour backup power for critical services”
- “Install EV charging infrastructure”
- “Reduce annual energy costs compared to conventional buildings”
- “Support local economic development and workforce training”
- “Achieve DER investment payback within 10 years”

Section 2: Scope of Work Tasks:

➤ **Task 1: Feasibility Study and Initial Assessment**

Objectives:

- Determine site suitability and energy needs
- Evaluate DER options and financial feasibility

Key Activities:

- Site assessment (environmental, structural, logistical)
- Energy load profile and usage analysis
- Technology evaluation (solar PV, battery storage, microgrid controls, geothermal technology)
- Facility fit and economic development potential
- Capital and operational cost modeling
- Financing and incentives research
- Payback and ROI analysis

Contractor Identification and Coordination:

- Identify the firms or individuals responsible for conducting feasibility-related assessments
- Determine if a general contractor will lead or if separate structural, electrical, and safety consultants are needed



Scope of Work for Clean Energy Resilience Hubs Template

- Develop a checklist of required services and point people (ex: structural engineer, solar installer, energy modeler)
- Ensure selected firms have relevant community-based or resilience-focused experience
- This step should tie directly into the Asset Readiness Level (ARL) tracking process

Deliverables:

- Feasibility Analysis Report
- Technology Assessment Report
- Cost Model and ROI Calculations
- Checklist of Contractors and Firms for Feasibility Work

➤ **Task 2: Design Development**

Objectives:

- Develop comprehensive engineering documentation for permitting and construction

Key Activities:

- Complete electrical, mechanical, and control system design
- Design for grid interconnection (including protection and safety systems)
- Ensure compliance with local, state, and federal codes

Deliverables:

- Stamped Electrical Permit Drawing Set
- Technical Specifications for all DER equipment

➤ **Task 3: Interconnection Support**

Objectives:

- Finalize utility interconnection process and obtain approval

Key Activities:

- Prepare and submit utility interconnection applications
- Respond to utility information requests and feedback
- Revise electrical design per utility recommendations

Deliverable:

- Approved Utility Interconnection Application

Section 3: Payment Milestones:

Milestone	Deliverable Description	Payment Percentage
Project Kick-Off	Signed agreement and confirmation of scope	20%



Scope of Work for Clean Energy Resilience Hubs Template

Completion of Feasibility Analysis	Feasibility report, energy analysis, cost and tech review	30%
Completion of Design Development	Electrical permit drawing set and equipment specifications	30%
Completion of Interconnection Support	Approved utility application	20%

Section 4: Proposal Submission Requirements:

Organizations utilizing this Scope of Work should submit the following:

- Company profile and relevant project experience
- Detailed task-by-task approach and methodology
- Proposed project timeline and key milestones
- Cost proposal with itemized fee structure
- Description of experience supporting:
 - Apprenticeship and workforce development
 - Local or disadvantaged community engagement
- References from comparable clean energy or resilience hub projects