

PREDEVELOPMENT PROPOSED WORK PLAN FORM

Affordable Solar and Storage Predevelopment Technical Assistance



Using the provided template, create a Proposed Work Plan that organizes your proposed project into different milestones. For each milestone, describe the specific activities that are proposed, who on your project team will be responsible, what outcomes/documentation can be expected, and the requested NYSEERDA funding. If the project is approved, this Work Plan will be the basis for negotiation and contracting with NYSEERDA for a Final Work Plan, including the payment schedule and required deliverables.

All projects should include at minimum four milestone points. The example milestones (mobilization, midpoint, substantial completion, and project deployment) described below may be used by applicants, or applicants may propose alternative/additional milestones:

- **Contract Execution Milestone** – Execute NYSEERDA agreement with Final Work Plan including full details on project activities, the entity responsible for completing project activities, project milestones, invoice totals for each milestone, and overall project budget.
- **Mobilization** – Establish a detailed project management plan and operating procedures for the project; confirm project team members, partners, and stakeholders fully committed/contracted and formally assigned roles; access any additional funding resources; and hold a launch meeting including the full project team, stakeholders, and partners.
- **Midpoint Milestone(s)** – Make significant progress towards or reach partial completion of project outcomes. For large or complex projects, more than one Midpoint Milestone should be used to account for different project components or stages. Upon completion of the Midpoint Milestone(s), projects should be able to demonstrate that all remaining project outcomes will be successfully completed.
- **Substantial Completion Milestone** – All major project outcomes have been or are close to completion. At this point, the project should be able to utilize the outcomes and initiate steps, such as the deployment of the business model and/or construction of the solar or storage system.
- **Project Deployment** – At the close of the agreement, the project team should be ready to initiate next steps, such as the deployment of the business model and/or construction of the solar electric and/or storage system.

Payments by NYSEERDA on approved projects will be made when each milestone is reached. The payment for each milestone shall be based upon the scope of the proposed activities and will be based upon the recommendation of the review committee. Using the Proposed Work Plan Template below, create your payment schedule for the proposed project by designating the amount of your total proposed NYSEERDA funding for each milestone.

The recommended payment schedule for the total proposed NYSEERDA budget, using the four example milestones, is as follows:

- Up to \$5,000 to be available upon full execution of the agreement.
- Up to 30% or \$30,000 (whichever is lower) at the competition of the Mobilization Milestone.
- Approximately 40% upon competition of Midpoint Milestone(s).
- At least 20% at Substantial Completion.
- At least 10% at Project Deployment

For more complex projects, or those requesting more than \$100,000, proposed Work Plans should include additional milestones and an alternate payment schedule deemed appropriate by the proposer, subject to review and approval by NYSEERDA. All proposed Work Plans must set the milestone payment for Mobilization (or equivalent milestone) at no more than the lower of 30% or \$30,000, and for Project Deployment at 10% of the total NYSEERDA funding proposed. All Work Plan activities must be completed within eighteen (18) months of project launch.

Milestone 0 – Contract Execution	
Time to Complete <i>Indicate, in months, time required to complete this milestone.</i>	
Key Activities <i>Describe the proposed activities to be funded by NYSERDA during this milestone. For each activity listed, indicate who will be responsible for or performing the work.</i>	
Outcome and Documentation <i>Results at this milestone should include a detailed project management plan, confirmed project team and other resources, and launch meetings or events.</i>	
Proposed NYSERDA funding to reach Milestone 0	
Milestone 1 – Mobile Milestone	
Time to Complete <i>Indicate, in months, time required to complete this milestone.</i>	
Key Activities <i>Describe the proposed activities to be funded by NYSERDA during this milestone. For each activity listed, indicate who will be responsible for or performing the work.</i>	
Outcome and Documentation <i>Results at this milestone should include a detailed project management plan, confirmed project team and other resources, and launch meetings or events.</i>	
Proposed NYSERDA funding to reach Milestone 1	
Milestone 2 – Midpoint Milestone	
Time to Complete <i>Indicate, in months, time required to complete this milestone.</i>	
Key Activities <i>Describe the proposed activities to be funded by NYSERDA during this milestone. For each activity listed, indicate who will be responsible for or performing the work.</i>	
Outcome and Documentation <i>Results at this milestone should include a detailed project management plan, confirmed project team and other resources, and launch meetings or events.</i>	
Proposed NYSERDA funding to reach Milestone 2	

Milestone 3 – Substantial Completion Milestone

Time to Complete <i>Indicate, in months, time required to complete this milestone.</i>	
Key Activities <i>Describe the proposed activities to be funded by NYSERDA during this milestone. For each activity listed, indicate who will be responsible for or performing the work.</i>	
Outcome and Documentation <i>Results at this milestone should include a detailed project management plan, confirmed project team and other resources, and launch meetings or events.</i>	
Proposed NYSERDA funding to reach Milestone 3	

Milestone 4 – Deployment Milestone

Time to Complete <i>Indicate, in months, time required to complete this milestone.</i>	
Key Activities <i>Describe the proposed activities to be funded by NYSERDA during this milestone. For each activity listed, indicate who will be responsible for or performing the work.</i>	
Outcome and Documentation <i>Results at this milestone should include a detailed project management plan, confirmed project team and other resources, and launch meetings or events.</i>	
Proposed NYSERDA funding to reach Milestone 4	
Total Proposed NYSERDA FUNDING <i>Total of all Milestone payments.</i>	

