CESMII Roadmap Projects Request for Proposals (RFP-2, Wave 2)

Request for Proposals Issue Date	December 5, 2019
1st Informational Webinar	December 17, 2019
2nd Informational Webinar	December 19, 2019
Submission Deadline for white papers	January 13, 2020
Expected Date for CESMII whitepapers Selection Notifications	February 3, 2020
Submission Deadline for full proposals	March 23, 2020
Expected Date for Projects Selection Notifications:	April 20, 2020
Anticipated Project Start Date:	July 17, 2020

☐ Applicants (*project teams*) must work together to develop a white paper in response to this RFP. See Section 11 (APPLICATION AND SUBMISSION INFORMATION) of this RFP for more information.

☐ White papers and full proposals need to be submitted directly by the proposed project lead organization to CESMII by email to roadmapprojects.info@cesmii.org .

☐ The RFP, templates and other related information are at https://www.cesmii.org/request-for-proposal/.

☐ Questions regarding this opportunity can be submitted at roadmapprojects.info@cesmii.org. An attempt will be made to answer all questions. Questions and answers will be posted publicly on the https://www.cesmii.org/questions-and-answers/.

☐ Informational webinars will be held on December 17, 2019 at 12pm PST (3pm, EST) and December 19, 2019 at 9:00am PST (Noon, EST). Additional information will be posted on the CESMII website: https://www.cesmii.org/request-for-proposal-webinar/.

☐ **Do not include any proprietary information in the proposals.**

Modifications

All modifications to the RFP are highlighted in <mark>yellow</mark> in the body of this solicitation.

Mod. No.	Date	Description of Modification
1	12/17/2019	Revised section 3.1.2 to reflect anticipated period of performance.

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1. REQUEST FOR PROPOSAL

1.1 DESCRIPTION/BACKGROUND

The objective of the Clean Energy Smart Manufacturing Innovation Institute ("Institute" or "CESMII") is to support U.S. prosperity and security, significantly advance manufacturing within the U.S., and contribute to the creation of the Manufacturing USA network. The vision for this Institute and other Institutes within the network is to help revitalize American manufacturing and support domestic manufacturing competitiveness.

The Clean Energy Smart Manufacturing Innovation Institute (CESMII) was awarded to the University of California at Los Angeles (UCLA) under the U.S. Department of Energy (DOE) Cooperative Agreement DE-EE0007613. CESMII is a national network that brings together over $140 million in public-private investment and more than 100 partners from leading manufacturers and universities across 30+ states. The Institute will accelerate Smart Manufacturing (SM) adoption through the integration of advanced sensors, data analytics, platforms and controls to radically improve productivity, precision, performance and energy consumption.

As SM becomes the norm in U.S. manufacturing, U.S. companies will create innovations in new, integrated, systematic processes with a highly skilled SM workforce and vibrant supply chain that will lead a global transformation of the manufacturing industry. To initiate this transformation, CESMII is utilizing an integrated technical approach of advanced sensors, controls, platforms and modeling across a diverse portfolio of technology projects. CESMII will use Roadmap projects (to drive technology and manufacturing practice) and additional application projects and services (to drive expansion) to achieve critical mass for widespread SM adoption and industry driven transformation.

CESMII's mission will be supported by an open, collaborative, vendor agnostic infrastructure in the form of The SM Platform and Marketplace. The SM Platform provides the enabling infrastructure and Marketplace for Information Technology (IT) and Operational Technology (OT) integration for optimizing manufacturing process and production efficiency. The SM Platform is an industry-specified and managed assembly of web accessible infrastructure and cloud services that function as a shared operating system (OS) for multiple application system composability, infrastructure service, deployment integration and interoperability with marketplace access to composable configuration and data services. The Marketplace provides resources as services, associated support services and data about software applications, or toolkits. The platform infrastructure will serve as the reference architecture and model for accessing software products, networked hardware systems, data and information resources, modeling and systems engineering, services, tools and training. CESMII will accelerate development of the functionality, scale, and production capability of the SM Platform. CESMII will expand the Marketplace to stimulate both manufacturing users and solution providers to invest in SM technology. The open access Marketplace approach will enable vendors of all sizes—small to large—to offer innovative, flexible, affordable solutions to the manufacturing industry. Open access refers to a publicly available source for SM Toolkits and applications that are accessible and affordable to all stakeholders.

CESMII and its members have worked together to develop a Roadmap to identify themes and topics that are of specific importance in the development of SM solutions necessary to achieve CESMII's goals. Our Roadmap can be found at https://www.cesmii.org/cesmii-roadmap/.

 The overall objectives of the Institute are to:
1. Lead a national effort to develop, research, test, and widely validate SM technologies and practices in a continuously evolving manner;
2. Develop a roadmap for SM technologies, practices, services, and training and update the roadmap periodically as needed;
3. Support SM Research & Development, to provide capabilities for and collaboration in open, pre-competitive work among multiple parties;
4. Establish a technical education and workforce development program that leverages regional networks;
5. Stimulate growth of a SM domestic supply chain;
6. Demonstrate participation of underrepresented groups in CESMII; and
7. Be financially self-sustaining after the five-year period of federal funding

The above objectives and goals are driven by the overall performance metrics for CESMII, which are:
1. Energy Productivity: Energy productivity gains in U.S. manufacturing will be doubled in 10 years.
2. Energy Efficiency: 15% improvement in energy efficiency in first-of-a-kind industrial testbeds will be achieved within 5 years.
3. Industry Deployment Costs: Cost of deploying SM technologies including hardware and software in existing manufacturing processes will be reduced 50% relative to state-of-the-art in 5 years.
4. Adoption Costs: Installed and operating cost for adoption of SM technologies including hardware and software will be recovered through energy savings and productivity improvements in 10 years.
5. Workforce: SM workforce capacity in U.S. will be increased two-fold by 2020 and five-fold by 2030.
6. Supply Chain: SM supply chain will increase value and participation 40% by 2030.

About this RFP:

This Request for Proposals (RFP) is the second round of requests (RFP2) for CESMII. It seeks to fund projects that support the objectives and goals stated above. RFP2 represents a total investment of approximately $13,850,000 with 50% in federal funding and 50% awardee cost-share. RFP2 will be issued in three distinct waves, shown in the table below:

	RFP2-Wave 1	RFP2-Wave 2	RFP2-Wave3
Approx. Investment	~$4.70M	~$1.40M	~$7.75M
Focus areas	Enabling R&D	Education & Workforce Development	Platform Capability Innovation Projects Profiles, Apps
Timing of request	July 2019	November 2019	December 2019

Approximately $1.40M ($700K federal and $700K cost share) will be allocated toward Education & Workforce Development focus areas as part of this second wave. Additional amounts are expected to be allocated toward development of Smart Manufacturing Platform capabilities, Smart Manufacturing innovation projects, Profiles and Apps in an additional wave in the coming weeks.

This document outlines the process that CESMII will use to solicit, review, and award projects for RFP2-Wave 2. The most recent version of the RFP is available at https://www.cesmii.org/request-for-proposal/.

2. AREAS OF INTEREST

2.1. CESMII's Education & Workforce Development (EWD) Mission

CESMII's institutional strategy is to democratize Smart Manufacturing (SM) to make it accessible to everyone. The core pillars of that strategy center on the democratization of SM Knowledge, Technology and Innovation, and the institute's efforts aligned with delivering value to the U.S. manufacturing ecosystem in support of those pillars. The institute's Education & Workforce Development (EWD) focus lands squarely on democratizing the knowledge to make SM a reality in the U.S.

In support of the institute's strategy, CESMII's EWD mission is to lead the creation of a national Learning Infrastructure to drive 21st century manufacturing competitiveness through the broad-scale adoption of Smart Manufacturing. We will accomplish this by creating formal and informal means of engaging the entire, diverse SM ecosystem, informing and educating specific audiences within the SM ecosystem on specific educational areas of focus. Areas of Focus for this RFP supports any of the following CESMII's long-term EWD goals:

2.1.1) Smart Manufacturing Education and Training
2.1.2) Smart Manufacturing Landscape – Software, Hardware, and Standards
2.1.3) Smart Manufacturing Deployment and Practice

CESMII is requesting white papers addressing the areas of interest below. The response in the white papers will inform the request for complete proposals from current and potential members.

2.1.1. Smart Manufacturing Education and Training

a) **Build pipeline of SM Engineering students.**
Today's students represents tomorrow's SM Professionals and industry leaders. CESMII looks to establish a strong pipeline of students fully aware of and prepared for productive careers leveraging SM to impact their roles, the businesses and their communities. To accomplish this, CESMII is inviting proposals for:
- Creating comprehensive SM curriculum for university and graduate-level engineering students, working closely with industry partners for curriculum requirements.
- Establishing a model for training content creation, delivery methods, trainers and evaluation mechanisms for CESMII SM training and education.
- Develop exemplar manufacturing processes for understanding the end-to-end requirements for smart manufacturing, lessons learned, knowledge gaps identified, and reusable components

2.1.2. Smart Manufacturing Landscape – Software, Hardware, and Standards

a) **Frame Smart Manufacturing for all.**

CESMII is "writing the book" to define SM for all manufacturers, machine builders, application vendors, systems integrators and academia in the U.S. manufacturing ecosystem. Through these efforts, CESMII will provide a common, baseline understanding of the SM landscape, inclusive of definitions / vocabulary / terms, goals, challenges and actionable steps required to adopt SM practices, thinking, cultural behaviors and technologies. To accomplish this, CESMII is inviting proposals for:

- Creating and deploying application/project-level assessment instruments, benchmarking tools, maturity models or methodologies to guide manufacturers through their SM journey. Projects must include educating industry in a train-the-trainer model to scale the use of the deliverables.

- Authoring a clear, well-researched SM Lessons Learned Study of global initiatives – an overview of the landscape of standards, standards bodies and competitive analysis of initiatives related to Smart Manufacturing globally. Study should document core areas of focus, stated value proposition, the industries initiatives and standards pertain to/support, as well as whether initiatives have tactical plans to achieve their state goals. Study must also include the conceptual definitions and differentiation between SM and Advanced Manufacturing (additive, robotics…), Digital Manufacturing, Industrie4.0 and other global SM-related initiatives.

2.1.3. Smart Manufacturing Deployment and Practice

a) **Engage manufacturing industry domain experts at scale.**
CESMII believes there is significant value in connecting industry domain experts within the U.S. manufacturing ecosystem to expand the impact in sharing their personal and professional knowledge. Engaging experts in this way can foster open, crowdsourced content in forums, discussions, expert networks and professional interactions that can complement formal educational offerings and raise the baseline of knowledge throughout industry. To accomplish this, CESMII is inviting proposals for:

- Knowledge capture and sharing of industry SM experts' experiences and expertise, making both readily accessible to U.S. manufacturers through online, community environments for peer-to-peer networking and problem solving.
- Building an Energy Productivity Calculator to map manufacturers' operational productivity levers (in the form of implemented SM Applications) to improve manufacturing output while maintaining or decreasing energy consumption. Calculator must be modeled for various industries including, but not limited to: Food, Beverage, Pulp & Paper, Chemicals, Oil & Gas, Steel, Automotive, Aerospace and Defense, Discrete Manufacturing.

b) **Engage and educate manufacturing executives.**
Manufacturing executives and enterprise / functional / plant / Operations leaders need a thorough grasp and understanding of SM and how it fits into their short and long-term plans for sustained success at the plant and enterprise level. Unfortunately, the disconnect between manufacturing plants and their enterprise's strategies, metrics and performance is prominent, and CESMII seeks to provide SM language for executives to align their corporate vision with their plants' operations. To accomplish this, CESMII is inviting proposals for:

- Creating enterprise-level instruments for engaging manufacturing executives, empowering their teams to assess their organization's current technological, operational and cultural readiness for SM.
- Building infrastructure for visualizing gaps in alignment of plant and enterprise priorities and initiatives necessary to ensure long-term sustained competitiveness.

- Benchmarking impact areas of SM initiatives on manufacturing enterprises across various industries.

2.2. Education & Workforce Development (EWD) Request for Proposal (RFP)

CESMII is inviting proposals that support the educational focus areas referenced above. Proposals must tie directly as possible to CESMII's technologies and definitions of SM wherever appropriate and be designed to scale.

CESMII intends to fund Projects in this RFP with the greatest chance of achieving the goals and mission of CESMII. CESMII may award an entire proposal or any part of a proposal at a funding level that will involve negotiation with the applicant. CESMII may issue awards in one, multiple, or none of the above Areas of Interest.

3. AWARD INFORMATION
3.1. AWARD OVERVIEW

3.1.1. Estimated Funding

CESMII expects to make approximately $700,000 of federal funding available for new awards under this RFP-2 Wave 2. Projects will also be required to provide cost share per Section 10 below. Additional federal funding will be allocated under a separate RFP. This represents a portion of the full investment of $13,850,000 allocated for this RFP issued in at least 3 Waves over the course of 3-4 months.

Table 1: Summary of Funding

Technical Areas of Interest	Number of Awards Anticipated	Total Federal Funding Available For this RFP Wave	Member cost-share	Period of Performance
Education & Workforce Development	5	$700,000	$700,000	12 Months
Total:	**5**	**$700,000**	**$700,000**	**12 Months**

3.1.2. Period of Performance

For this RFP, CESMII anticipates making awards with periods of performance up to 12 months (but not less than 6 months). All projects will be stage-gated with Go/No-Go decisions at each stage (at least one Go/No Go decision point for every CESMII budget period). We expect that the first phase of the project to be from July 1, 2020 to December 2020, and a Go/No Go decision point is required at this point. The second phase (if there is one) will begin in January 2021. Project budgets and work scope need to be developed around this anticipated schedule. A more accurate schedule will be provided when the awards are approved. Project continuation will be contingent upon satisfactory performance and Go/No-Go decision review. Each quarter, as well as at each Go/No-Go decision point, CESMII will evaluate project performance, project schedule adherence, meeting milestone objectives, compliance with reporting requirements, and overall contribution to the program goals and objectives.

3.1.3. CESMII / UCLA Funding Agreements

UCLA will negotiate a subrecipient agreement with lead organizations of each of the project teams. These agreements will include mandatory flow-down terms and conditions from the DOE-UCLA cooperative agreement.

4. ELIGIBILITY INFORMATION

Project teams consisting of CESMII members as well as non-members are eligible to submit proposals in response to this RFP. All proposals are submitted directly to CESMII Headquarters for evaluation. Proposal team leads and team members (current or potential members who will be sub-recipients under UCLA) must meet the criteria set forth below to be considered for eligibility and evaluation.

4.1. ELIGIBLE APPLICANTS

4.1.1. Project Team Members

All project team members submitting proposals to CESMII must be members in good standing by the time the project is awarded by CESMII. A member is in good standing if they have executed a membership agreement and are current with their annual dues. A potential member may submit a proposal, but must be a member in good standing by the time the project is awarded. Information regarding CESMII Membership can be found on the CESMII website, https://www.cesmii.org/membership-information/.

4.1.2. Participation by Foreign Entities

Approved CESMII members who are foreign entities may apply for project funding. If any project work will be done in a foreign country, CESMII will work with the project team to complete a Foreign Work Waiver (FWW) that will be submitted to DOE for review and approval. See section 5 below for more information.

5. PERFORMANCE OF WORK IN THE UNITED STATES

All work must be performed in the United States unless a waiver has been approved. This requirement does not apply to the purchase of supplies and equipment; however, every effort should be made to purchase supplies and equipment within the United States.

5.1. FAILURE TO COMPLY

If the Project Team fails to comply with the Performance of Work in the United States requirement, CESMII will deny reimbursement for the work conducted outside the United States and such costs will not be recognized as allowable cost share regardless of whether the work is performed by the sub-recipients, contractors or other project partners.

5.2. WAIVER FOR WORK OUTSIDE THE U.S.

All work must be performed in the United States, however, CESMII may approve the performance of a portion of the work outside the United States under limited circumstances. A waiver must be submitted to CESMII and approved by DOE prior to conducting any work outside the U.S. To request a waiver, the Project Team must submit a written waiver request to CESMII, which includes the following information:
1. The rationale for performing the work outside the U.S.;
2. A description of the work proposed to be performed outside the U.S.;
3. A description of the anticipated benefits to be realized by the proposed work and the anticipated contributions to the US economy;
4. A description of the likelihood of Intellectual Property (IP) being created from the work and the treatment of any such IP;
5. The total estimated cost (CESMII funding and Project Team cost share) proposed for the work to be performed; and
6. The countries in which the work is proposed to be performed.

For the rationale, the Project Team must demonstrate to the satisfaction of CESMII and DOE that the performance of work outside the United States would further the purposes of the CESMII Prime Cooperative Agreement and is in the economic interests of the United States.

6. U.S. MANUFACTURING COMMITMENTS

CESMII 's U.S. Manufacturing Plan represents commitment to support U.S. manufacturing as a result of its performance under the (DOE) Cooperative Agreement DE-EE0007613. When a project is selected for an award, the U.S. Manufacturing Plan will become part of the terms and conditions of the sub-agreement. The CESMII Manufacturing Plan can be found at https://www.cesmii.org/request-for-proposal/.

7. NEPA REQUIREMENTS

All projects awarded under this RFP are subject to the National Environmental Policy Act (NEPA) prior to commencement of work. NEPA requires all Federal agencies to integrate environmental values into their decision-making processes by considering the potential environmental impacts of their proposed actions. A completed EQ-1 NEPA form will be required after the selection of projects.

CESMII will submit all Project NEPA information and documentation to DOE for review. Prior to authorizing the use of Federal funds, DOE may require information in addition to the above in order to issue a NEPA determination for the project. Additional information in regard to the NEPA requirements can be found at https://www.eere-pmc.energy.gov/NEPA.aspx.

8. INTELLECTIUAL PROPERTY PLAN

The CESMII Intellectual Property Management Plan governs the treatment of Intellectual Property and the rights between CESMII and its Members. The DOE Cooperative Agreement controls the Intellectual Property rights between DOE, CESMII, and its Sub recipients/Sub-awardees. For details and additional information, the CESMII Intellectual Property Plan can be found at https://www.cesmii.org/request-for-proposal/ and the DOE Intellectual Property Clauses pertaining to the Cooperative Agreement can be found at https://www.cesmii.org/model-subagreement/.

9. MODEL SUBAGREEMENT

CESMII will negotiate sub-agreements for all selected projects. Model sub-agreements, which include mandatory flow-down clauses as required by the Cooperative Agreement DE-EE0007613, Reporting Requirements, Intellectual Property Clauses, and National Policy Assurances can be found at https://www.cesmii.org/model-subagreement/.

10. COST SHARING

The cost share must be at least 50% of the total allowable costs for the project (i.e., the sum of the CESMII share and the recipient share of allowable costs equals the total allowable cost of the project) and must come from non-Federal sources unless otherwise allowed by law. (See 2 CFR 200.306 and 2 CFR 910.130 for the applicable cost sharing requirements.) Although the cost share requirement applies to the project, including work performed by members of the project team, the project lead organization is legally responsible to provide the entire cost share.

10.1.   COST SHARE ALLOCATION

Each Project Team is free to determine how best to allocate the cost share requirement among the team members. The amount contributed by individual Project Team members may vary, as long as the cost share requirement for the project as a whole is met.

10.2.   ALLOWABLE COST SHARE

The Team members may provide cost share in the form of cash or in-kind contributions. See 2 CFR 200.306 and 2 CFR 910.130 for information on what is allowable cost share.

10.3.   COST SHARE VERIFICATION

Upon selection for award negotiations, all Project Team Members are required to provide written assurance of their proposed cost share contributions in their final SOPOs. Each organization providing cost share in support of the Project must submit a Letter of Commitment that describes the contribution and signed by an authorized representative of the organization.

11. APPLICATION AND SUBMISSION INFORMATION

11.1.   APPLICATION PROCESS

Both current and prospective CESMII members are encouraged to write white papers for submission in response to the RFP Wave 2. CESMII will review and select white papers, and invitations to write full proposals will be sent to the selected candidates. Any project team members who are not CESMII members will be required to finalize CESMII membership and be in good standing prior to the awarding of the project by CESMII Head Quarters (HQ).

Roadmap Projects follow a Stage Gate Process comprising of four stages (Refer to Figure 1) with go/no-go gates (Gate 1 to Gate 4) in which CESMII, and the DOE work together to provide guidance, review, selection and approval of projects. The basic flow of documentation begins with potential project ideas and concepts generated by the CESMII members or potential members in response to this RFP.
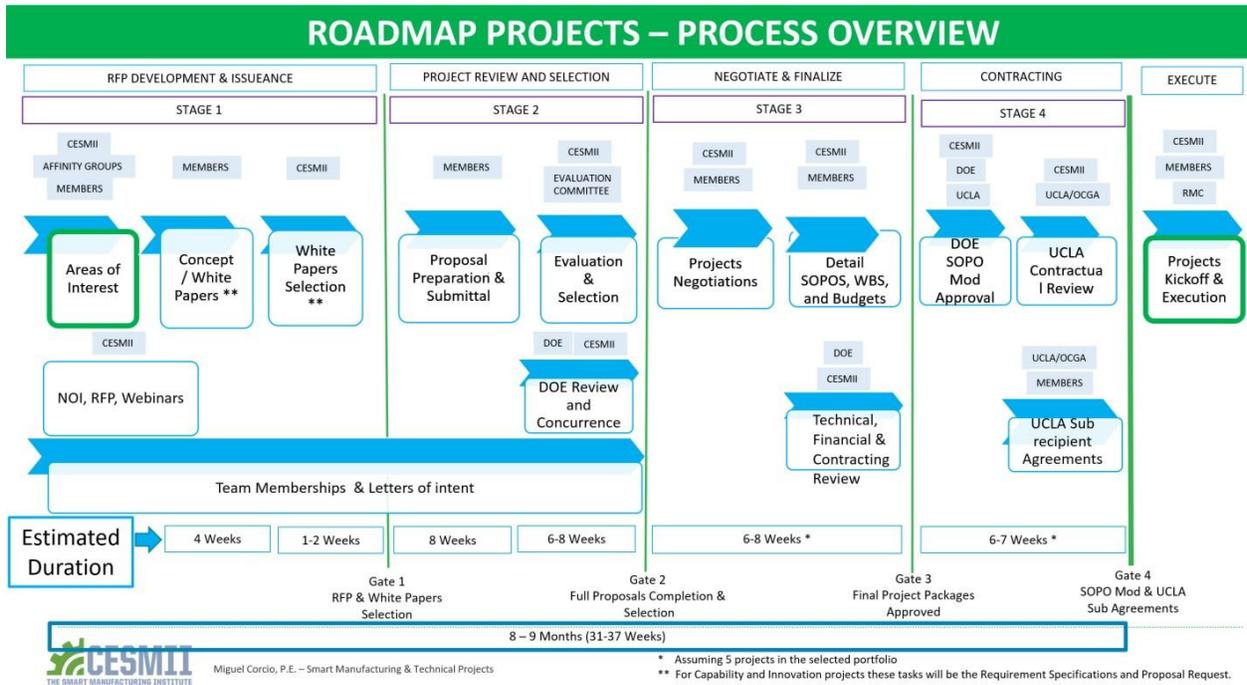
Figure 1: Roadmap Project Process Overview

In stage 1, the project teams will develop and submit white papers. The Gate is the selection of white papers based on relevance to the proposals selection criteria in section 12.

In stage 2, CESMII invites full proposals from selected white paper teams. The Gate is the final selection and concurrence with the DOE on selected proposals.

In stage 3, CESMII/UCLA technical and contractual teams, and Lead Organizations will negotiate final scope and budgets for the selected proposals. CESMII HQ and lead organizations will prepare final project document packages (SOPOs, Budgets, WBSs, NEPA Tables, Commitment letters, etc.) for submittals to the DOE. CESMII and DOE will enter into a final technical and financial review. The Gate is the submittal and approval of final project documentation.

In Stage 4, CESMII/UCLA and DOE will work closely to modify and approve the current Institute SOPO to include selected projects budgets. Upon SOPO mod approval, UCLA and CESMII will perform a final contractual review and issue sub recipient agreements to the individual project lead organizations. Ultimately and prior to work starting, all new projects will need to be incorporated into the DOE award through a formal modification, followed by UCLA sub-recipient awards with the project performer(s). .The Gate is the DOE SOPO modification approval and UCLA sub recipient agreements to lead organizations.

All proposal submissions must conform to the following form and content requirements (described below) and must be submitted to roadmapprojects.info@cesmii.org unless specifically stated otherwise.

Proposals must conform to the following requirements:

- ☐ Proposals must be submitted in Adobe PDF format unless requested otherwise.
- ☐ Proposals must be written in English.
- ☐ All pages must be formatted to fit on 8.5 x 11-inch paper with margins not less than one inch on every side. Use Times New Roman typeface, a black font color, and a font size of 12 point or larger (except in figures or tables, which may be a 10-point font). A symbol font may be used to insert Greek letters or special characters, but the font size requirement still applies. References must be included as footnotes or endnotes in a font size of 10 or larger. Footnotes and endnotes are counted toward the maximum page requirement.
- ☐ Submit the proposal as a single PDF file.

11.2.   APPLICATION FORMS

The application guidelines and instructions are available on the CESMII website. (https://www.cesmii.org/request-for-proposal/)

11.3.   PROPOSAL

The Proposal starts with a white paper and must conform to the content and form requirements provided online. Selection of white papers is based on relevance to the general and evaluation criteria provided below. After the selection of the white papers, CESMII will invite full proposals only from the selected white paper teams. The full proposals must address the Review Criteria as discussed in 12 of this RFP.

Applicants must provide sufficient citations and references to the primary research literature to justify the claims and approaches made in the Technical Approach. However, CESMII and reviewers are under no obligation to review cited sources.

White Papers and full Proposals must be completed using the provided proposal template available on the CESMII website (https://www.cesmii.org/request-for-proposal/). White papers should contain no more than four pages and full proposals no more than 15 pages total.

12. EVALUATION & SELECTION CRITERIA

12.1. GENERAL CRITERIA

Table 2: General Criteria

Criteria	Metrics
Educational Area of Interest	• Alignment with a specific CESMII educational area of interest as identified in this Request for Proposal
Project Execution	• Clear project objectives and scope statement • High-level project plan to meet milestone dates • Key resources identified and confirmation of availability. • Complete cost breakdown including sub recipient budget • Measure of success • Project risks

12.2.   EVALUATION CRITERIA

Areas of Interest: Education & Workforce Development (Section 2.1)
1. **EWD Merit (Weight: 40%)** – The extent to which the project addresses the areas of interest stated in this RFP. The extent to which the project, if successfully carried out, will make a valuable contribution to the field of smart manufacturing, CESMII and its members. The project objectives are clearly stated, challenging, well-conceived, and technically feasible. The degree to which this project will provide valuable new tools, educational assets or hardware/software/data to support adjacent Institute activities. Project will materially advance the mission of the Institute.
2. **EWD Approach (Weight: 35%)** - Adequacy and feasibility of the applicant's approach to achieving the stated objectives of the project. The extent to which the project plan, methods, analysis, and deliverables are properly developed, well integrated, and appropriate to the objectives of the project. Appropriate rationale, and completeness of the proposed Project Proposal. Degree to which the applicant has identified high-risk challenges and presented reasonable mitigation strategies. There is a high degree of innovation, novelty or originality in the approach. Adequacy and appropriateness of the proposed schedule, staffing plan, and proposed travel.
3. **Project and Management Capabilities (Weight: 25%)** - Likeliness that the proposed work can be accomplished within the proposed budget and performance period by the project team, given their experience, expertise, past accomplishments, available resources, institutional commitment, and access to technologies. Clarity, completeness and appropriateness of the project plan and timeline. Clarity, logic, and effectiveness of the project organization, including sub awardees to successfully complete the project. Credentials, capabilities, experience of the key personnel. Adequacy and availability of personnel, facilities, and equipment (both hardware and software) to perform the proposed project within the budget specified.

12.3.   PORTFOLIO SELECTION CRITERIA
To create a balanced portfolio CESMII will select projects that are complementary and support the accomplishment of CESMII objectives. This will include but not limited to the following criteria:
1. Meets strategic goals of the Institute
2. Fit with current Budget Period (BP) funding profiles
3. Cross-industry applicability and broad-based impact
4. Utilization of the SM Platform core capabilities and messages and SM Marketplace
5. Full compliance with DOE and CESMII requirements
6. Broader base application across other industries for reusability
7. High-level fit to create balance in the Institute's project portfolio
8. Whether the proposed project will accelerate transformational technological advances in areas that industry by itself is not likely to undertake because of technical and financial uncertainty

13. OTHER INFORMATION
13.1.   RFP MODIFICATIONS
Amendments to this RFP will be posted on the CESMII Website at https://www.cesmii.org/request-for-proposal/ . CESMII recommends that you check the website often to ensure you receive timely notice of any amendments to the RFP.

13.2.   INFORMATIONAL WEBINAR

CESMII will conduct one or more informational webinars during the RFP process. Webinars will be held after the initial RFP release but before the due date for Proposals.

Specific dates for webinars can be found on the cover page of the RFP and the CESMII website upon release of RFP.

14. POST SELECTION REQUIREMENTS

The following documents are required to be submitted after selection during award negotiations:
1. SOPO
2. EQ-1 NEPA NEPA Form
3. Cost Share commitment letters
4. EERE335 forms for different team members as necessary
5. WBS
6. Schedule