

GRANTS/CONTINGENT AWARD REQUEST



To: Grants and Loans Office

Date: 11 / 30 / 2011

Project Manager: Leslie Baroody

Phone Number: (916) 654-4417 ext.

Office: EFTO

Division: FTD

MS- 27

Project Title: Energy Commission Specialist II

Type of Request: (check one)

[X] New Agreement: (include items A-F from below) Agreement Number: Assigned by the G&L Office
Program: Alternative and Renewable Fuel and Vehicle Technology Program
Solicitation Name and/or Number: PON 10-602
Legal Name of Recipient: Sacramento Area Council of Governments
Recipient's Full Mailing Address: 1415 L Street, Suite 300
Sacramento, CA 95814
Recipient's Project Officer: Raef Porter Phone Number: (916) 340-6261 ext.
Agreement Start Date: 02 / 15 / 2012 Agreement End Date: 7 / 24 / 2013

[ ] Amendment: (Check all that apply) Agreement Number: \_\_\_\_\_
[ ] Term Extension - New End Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_
[ ] Work Statement Revision (include Item A from below)
[ ] Budget Revision (include Item B from below)
[ ] Change of Scope (include Items A - F as applicable from below)
[ ] Other: (Specify) \_\_\_\_\_

ITEMS TO ATTACH WITH REQUEST:

- A. Work Statement
B. Budget
C. Recipient Resolution, if applicable. (Resolution may be requested in Special Conditions if not currently available.)
D. Special Conditions, if applicable.
E. CEQA Compliance Form
F. Other Documents as applicable
• Copy of Score Sheets
• Copy of Pre-Award Correspondence
• Copy of All Other Relevant Documents

California Environmental Quality Act (CEQA)

[ ] CEC finds, based on recipient's documentation in compliance with CEQA:
[ ] Project exempt: Section \_\_\_\_\_ NOE filed: \_\_\_\_ / \_\_\_\_ / \_\_\_\_
[ ] Environmental Document prepared: Type \_\_\_\_\_ NOD filed: \_\_\_\_ / \_\_\_\_ / \_\_\_\_
[X] Other: Not a project under CEQA
[ ] CEC has made CEQA finding described in CEC-280, attached

Funding Information:

\*Source #1: ARFVTP Amount: \$ 200,000.00 Statute: 2010 FY: 10-11 Budget List #: 601.118C
\*Source #2: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ Statute: \_\_\_\_\_ FY: \_\_\_\_\_ Budget List #: \_\_\_\_\_
\*Source #3: \_\_\_\_\_ Amount: \$ 0.00 Statute: \_\_\_\_\_ FY: \_\_\_\_\_ Budget List #: \_\_\_\_\_

If federally funded, specify federal agreement number: \_\_\_\_\_
\* Source Examples include ERPA, PIER-E, PIER-NG, FED, GRDA, ARFVT, OTHER.

Business Meeting Approval: (refer to Business Meeting Schedule)

Proposed Business Meeting Date: 02 / 08 / 2012 [ ] Consent [X] Discussion
Business Meeting Participant: Leslie Baroody Time Needed: (5 minutes)

Agenda Notice Statement: (state purpose in layperson terms)

Possible approval of a [X] Grant / [ ] Contingent Award to...
to produce a comprehensive Plug-in electric Vehicle (PEV) Readiness Plan for the six county Capitol Region, to support the mass deployment of electric vehicles. This Plan will include plans for PEV infrastructure deployment, streamlining of permitting, installation and inspection processes and consumer education and outreach.

## EXHIBIT A WORK STATEMENT

### TECHNICAL TASK LIST

Task #	Task Name
1	Administration
2	Establish a Consumer Outreach Best Practices and Guidelines Plan
3	Develop PEV Planning, Building Code and Permitting Process Guideline and Outreach for Local Agencies
4	Emergency Responder Preparedness
5	PEV Charger Infrastructure Planning
6	Draft Capital Area PEV Readiness Plan
7	Final Capital Area PEV Readiness Plan

### GLOSSARY

Specific terms and acronyms used throughout this scope of work are defined as follows:

Term/ Acronym	Definition
ARFVT Program	Alternative and Renewable Fuel and Vehicle Technology Program
CAPEVCC	Capital Area Plug-in Electric Vehicle Coordinating Council
CPR	Critical Project Review
Energy Commission	California Energy Commission
EVSE	Electric Vehicle Supply Equipment, commonly called chargers
FTD	Fuels and Transportation Division
OEM	Original Equipment Manufacturers/ automakers
PEV	Plug-in Electric Vehicles
Recipient	Sacramento Area Council of Governments
SACOG	Sacramento Area Council of Governments
SMUD	Sacramento Municipal Utility District

### Background

Assembly Bill 118 (Núñez, Chapter 750, Statutes of 2007), created the Alternative and Renewable Fuel and Vehicle Technology Program (ARFVT Program). The statute, subsequently amended by AB 109 (Núñez, Chapter 313, Statutes of 2008), authorizes the California Energy Commission (Energy Commission) to develop and deploy alternative and renewable fuels and advanced transportation technologies to help attain the state's climate change policies. The Energy Commission has an annual program budget of approximately \$100 million and provides financial support for projects that:

- Develop and improve alternative and renewable low-carbon fuels;

- Optimize alternative and renewable fuels for existing and developing engine technologies;
- Produce alternative and renewable low-carbon fuels in California;
- Decrease, on a full fuel cycle basis, the overall impact and carbon footprint of alternative and renewable fuels and increase sustainability;
- Expand fuel infrastructure, fueling stations, and equipment;
- Improve light-, medium-, and heavy-duty vehicle technologies;
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets;
- Expand infrastructure connected with existing fleets, public transit, and transportation corridors; and
- Establish workforce training programs, conduct public education and promotion, and create technology centers.

The Energy Commission issued solicitation PON-10-602 to provide funding opportunities under the ARFVT Program to help regions develop plug-in electric vehicle (PEV) strategic plans for electric vehicle supply equipment (EVSE), establish best practices for “PEV-ready” building and public works guidelines, and help to streamline EVSE permitting, installation, and inspection processes. To be eligible for funding under PON-10-602, the projects must also be consistent with the Energy Commission’s ARFVT Program Investment Plan updated annually. In response to PON-10-602, Recipient submitted application #9, which was proposed for funding in the Energy Commission’s Notice of Proposed Awards posted September 26, 2011, and is incorporated by reference to this Agreement in its entirety.

The Capital Area Plug-in Electric Vehicle Coordinating Council (CAPEVCC) will consist of stakeholders in the six-county region surrounding California’s State Capitol in Sacramento. The council will be led by the Sacramento Area Council of Governments (SACOG) staff with support provided by non-profit Valley Vision. The core members who have signed onto the CAPEVCC along with SACOG, include the Sacramento Municipal Utility District, the Sacramento Metropolitan Air Quality Management District, Greater Sacramento Regional Clean Air Coalition (Clean Cities), Valley Vision, the University of California, Davis, Yolo/Solano Air Quality Management District, the cities of Sacramento, Citrus Heights, West Sacramento, Folsom, and Elk Grove, Sacramento County, Roseville Electric and PG&E, and the John L. Sullivan Automotive Group.

The Capital Area Region is comprised of El Dorado, Placer, Sacramento, Sutter, Yolo and Yuba counties including 22 cities. The region is home to a diverse geography including the floor of the Sacramento Valley, the Sacramento River and the Sierra Nevada mountain range. It also contains a diversity of work, living, and recreational opportunities. Since the California state capital resides within the region, the region is uniquely positioned to influence decision makers that help shape how the state will grow socially, economically, and environmentally.

**Problem Statement:**

The Capital Area Region has been identified by automakers as a target first-launch market for PEVs. According to auto manufacturer estimates, the number of PEVs in

the region may exceed 300 by 2012. Individually many organizations in the region have extensive experience with PEVs, charging infrastructure and customer behavior. However, there is a need to form a regional group that brings together key stakeholders and decision makers for discussion and collaboration that leads to coherent PEV-friendly planning and infrastructure development for the entire community.

The six-county CAPEVCC will consider issues that include:

- Planning policies designed to incorporate PEV charging infrastructure that will lower the installation cost;
- Coordinated permitting and inspection processes to help prospective PEV buyers quickly navigate vehicle charging for residential, fleet or public charging;
- Consistent outreach and educational messages so information for prospective PEV buyers is clear and easily understood;
- Standardized permitting fees for installation of residential and commercial EVSE by developing consistent application forms and requirements for permitting;
- If funding is identified, pursue goal of waiving or standardizing permitting fees and standardize permitting inspection timelines;
- Publicly accessible EVSE facilities strategically located throughout the region and the Interstate 80, Interstate 5, Highway 50 and Highway 99 corridors to ease new PEV buyers range anxiety, while minimizing stranded assets.;
- Identifying information and training opportunities needed for emergency responders to safely deal with PEVs and EVSE in our community.

### **Goal of the Agreement:**

The goal of this agreement is to bring together Capital Area stakeholders to address the roll-out of PEVs in a coherent, cohesive manner that promotes wise planning with a consumer-friendly focus.

### **Objectives of the Agreement:**

The objective of this Agreement is to produce a comprehensive PEV Readiness Plan for the Sacramento Capital Region. The result of this collaborative effort will be a report detailing the recommended actions for the Capital Area's preparation for the growth of PEVs among other things the PEV Readiness Plan will:

- Establish tailored guidelines that civic planners can use to establish consistent PEV readiness building codes, permitting requirements and inspection processes to expedite charging infrastructure installations in the Sacramento Region;
- Develop guidelines for consistent outreach, message, and education to consumers;
- Plan for public infrastructure deployment that benefits individual motorists and promotes fleet adoption of PEVs; and

- Identify training opportunities that meet basic emergency responder needs.

## **TASK 1 ADMINISTRATION**

### **Task 1.1 Attend Kick-off Meeting**

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

#### **The Recipient shall:**

- Attend a “Kick-Off” meeting with the Commission Project Manager, the Grants Officer, and a representative of the Accounting Office. The Recipient shall bring its Project Manager, Agreement Administrator, Accounting Officer, and others designated by the Commission Project Manager to this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting. Prior to the kick-off meeting, the Commission Project Manager will provide an agenda to all potential meeting participants.

The administrative portion of the meeting shall include, but not be limited to, discussion of the following:

- Terms and conditions of the Agreement
- Critical Project Review (Task 1.2)
- Match fund documentation (Task 1.6) No work may be done until this documentation is in place.
- Permit documentation (Task 1.7)
- Subcontracts needed to carry out project (Task 1.8)

The technical portion of the meeting shall include, but not be limited to, a discussion of the following:

- The Commission Project Manager’s expectations for accomplishing tasks described in the Scope of Work
- An updated Schedule of Products
- Progress Reports (Task 1.4)
- Technical Products (Product Guidelines located in Section 5 of the Terms and Conditions)
- Final Report (Task 1.5)

The Commission Project Manager shall designate the date and location of this meeting.

#### **Recipient Products:**

- Updated Schedule of Products
- Updated List of Match Funds

- Updated List of Permits

**Commission Project Manager Product:**

- Kick-Off Meeting Agenda

**Task 1.2 Critical Project Review (CPR) Meetings**

The goal of this task is to determine if the project should continue to receive Energy Commission funding to complete this Agreement and to identify any needed modifications to the tasks, products, schedule or budget.

CPRs provide the opportunity for frank discussions between the Energy Commission and the Recipient. The Commission Project Manager may schedule CPRs as necessary, and CPR costs will be borne by the Recipient.

Participants include the Commission Project Manager and the Recipient and may include the Commission Grants Officer, the Fuels and Transportation Division (FTD) team lead, other Energy Commission staff and Management as well as other individuals selected by the Commission Project Manager to provide support to the Energy Commission.

**The Commission Project Manager shall:**

- Determine the location, date, and time of each CPR meeting with the Recipient. These meetings generally take place at the Energy Commission, but they may take place at another location.
- Send the Recipient the agenda and a list of expected participants in advance of each CPR. If applicable, the agenda shall include a discussion on both match funding and permits.
- Conduct and make a record of each CPR meeting. One of the outcomes of this meeting will be a schedule for providing the written determination described below.
- Determine whether to continue the project, and if continuing, whether or not modifications are needed to the tasks, schedule, products, and/or budget for the remainder of the Agreement. Modifications to the Agreement may require a formal amendment (please see section 8 of the Terms and Conditions). If the Commission Project Manager concludes that satisfactory progress is not being made, this conclusion will be referred to the Lead Commissioner for Transportation for his or her concurrence.
- Provide the Recipient with a written determination in accordance with the schedule. The written response may include a requirement for the Recipient to revise one or more product(s) that were included in the CPR.

**The Recipient shall:**

- Prepare a CPR Report for each CPR that discusses the progress of the Agreement toward achieving its goals and objectives. This report shall

include recommendations and conclusions regarding continued work of the projects. This report shall be submitted along with any other products identified in this scope of work. The Recipient shall submit these documents to the Commission Project Manager and any other designated reviewers at least 15 working days in advance of each CPR meeting.

- Present the required information at each CPR meeting and participate in a discussion about the Agreement.

**Commission Project Manager Products:**

- Agenda and a list of expected participants
- Schedule for written determination
- Written determination

**Recipient Product:**

- CPR Report(s)

**Task 1.3 Final Meeting**

The goal of this task is to closeout this Agreement.

**The Recipient shall:**

- Meet with Energy Commission staff to present the findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement. This meeting will be attended by, at a minimum, the Recipient, the Commission Grants Office Officer, and the Commission Project Manager. The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be two separate meetings at the discretion of the Commission Project Manager.
- Present at the technical portion of the meeting an assessment of the degree to which project and task goals and objectives were achieved, findings, conclusions, recommended next steps (if any) for the Agreement, and recommendations for improvements.
- Discuss with the Commission Project Manager and the Grants Officer the following Agreement closeout items at the administrative portion of the meeting:
  - What to do with any equipment purchased with Energy Commission funds (Options)
  - Energy Commission's request for specific "generated" data (not already provided in Agreement products)
  - Need to document Recipient's disclosure of "subject inventions" developed under the Agreement
  - "Surviving" Agreement provisions
  - Final invoicing and release of retention

- Prepare a schedule for completing the closeout activities for this Agreement.

The Commission Project Manager will determine the appropriate meeting participants.

**Recipient Products:**

- Written documentation of meeting agreements
- Schedule for completing closeout activities

**Task 1.4 Monthly Progress Reports**

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the research objectives of this Agreement on time and within budget.

The objectives of this task are to summarize activities performed during the reporting period, to identify activities planned for the next reporting period, to identify issues that may affect performance and expenditures, and to form the basis for determining whether invoices are consistent with work performed.

**The Recipient shall:**

- Prepare a Monthly Progress Report which summarizes all Agreement activities conducted by the Recipient for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due to the Commission Project Manager within 10 days of the end of the reporting period. The recommended specifications for each progress report are contained in Section 6 of the Terms and Conditions of this Agreement.

**Product:**

- Monthly Progress Reports

**Task 1.5 Final Report**

The goal of the Final Report is to assess the project's success in achieving its goals and objectives, advancing science and technology, and providing energy-related and other benefits to California.

The objectives of the Final Report are to clearly and completely describe the project's purpose, approach, activities performed, results, and advancements in science and technology; to present a public assessment of the success of the project as measured by the degree to which goals and objectives were achieved; to make insightful observations based on results obtained; to draw conclusions; and to make recommendations for further projects and improvements to the FTD project management processes.

The Final Report shall be a public document. If the Recipient has obtained confidential status from the Energy Commission and will be preparing a confidential version of the Final Report as well, the Recipient shall perform the following activities for both the public and confidential versions of the Final Report.

**The Recipient shall:**

- Prepare an Outline of the Final Report.
- Prepare a Final Report following the approved outline and the latest version of the Final Report guidelines which will be provided by the Commission Project Manager. The Commission Project Manager shall provide written comments on the Draft Final Report within fifteen (15) working days of receipt. The Final Report must be completed at least 60 days before the end of the Agreement Term.
- Submit one bound copy of the Final Report with the final invoice.

**Products:**

- Draft Outline of the Final Report
- Final Outline of the Final Report
- Draft Final Report
- Final Report

**Task 1.6 Identify and Obtain Matching Funds**

The goal of this task is to ensure that the match funds planned for this Agreement are obtained for and applied to this Agreement during the term of this Agreement.

The costs to obtain and document match fund commitments are not reimbursable through this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient may utilize match funds for this task. Match funds shall be spent concurrently or in advance of Energy Commission funds for each task during the term of this Agreement. Match funds must be identified in writing and the associated commitments obtained before the Recipient can incur any costs for which the Recipient will request reimbursement.

**The Recipient shall:**

- Prepare a letter documenting the match funding committed to this Agreement and submit it to the Commission Project Manager at least 2 working days prior to the kick-off meeting. If no match funds were part of the proposal that led to the Energy Commission awarding this Agreement and none have been identified at the time this Agreement starts, then state such in the letter. If match funds were a part of the proposal that led to the Energy Commission awarding this Agreement, then provide in the letter a list of the match funds that identifies the:

- Amount of each cash match fund, its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied.
- Amount of each in-kind contribution, a description, documented market or book value, and its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient shall identify its owner and provide a contact name, address and telephone number, and the address where the property is located.
- Provide a copy of the letter of commitment from an authorized representative of each source of cash match funding or in-kind contributions that these funds or contributions have been secured. For match funds provided by a grant a copy of the executed grant shall be submitted in place of a letter of commitment.
- Discuss match funds and the implications to the Agreement if they are reduced or not obtained as committed, at the kick-off meeting. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide the appropriate information to the Commission Project Manager if during the course of the Agreement additional match funds are received.
- Notify the Commission Project Manager within 10 days if during the course of the Agreement existing match funds are reduced. Reduction in match funds must be approved through a formal amendment to the Agreement and may trigger an additional CPR.

**Products:**

- A letter regarding match funds or stating that no match funds are provided
- Copy(ies) of each match fund commitment letter(s) (if applicable)
- Letter(s) for new match funds (if applicable)
- Letter that match funds were reduced (if applicable)

**Task 1.7 Identify and Obtain Required Permits**

The goal of this task is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track.

Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient shall budget match funds for any expected expenditures associated with obtaining permits. Permits must be identified in writing and obtained before the Recipient can make any expenditure for which a permit is required.

**The Recipient shall:**

- Prepare a letter documenting the permits required to conduct this Agreement and submit it to the Commission Project Manager at least 2 working days prior to the kick-off meeting. If there are no permits required at the start of this Agreement, then state such in the letter. If it is known at the beginning of the Agreement that permits will be required during the course of the Agreement, provide in the letter:
  - A list of the permits that identifies the:
    - Type of permit
    - Name, address and telephone number of the permitting jurisdictions or lead agencies
  - The schedule the Recipient will follow in applying for and obtaining these permits.
- Discuss the list of permits and the schedule for obtaining them at the kick-off meeting and develop a timetable for submitting the updated list, schedule and the copies of the permits. The implications to the Agreement if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in the Progress Reports and will be a topic at CPR meetings.
- If during the course of the Agreement additional permits become necessary, provide the appropriate information on each permit and an updated schedule to the Commission Project Manager.
- As permits are obtained, send a copy of each approved permit to the Commission Project Manager.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the Commission Project Manager within 5 working days. Either of these events may trigger an additional CPR.

**Products:**

- Letter documenting the permits or stating that no permits are required
- A copy of each approved permit (if applicable)
- Updated list of permits as they change during the term of the Agreement (if applicable)
- Updated schedule for acquiring permits as changes occur during the term of the Agreement (if applicable)

**Task 1.8 Obtain and Execute Subcontracts**

The goal of this task is for Recipients to identify any subcontracts required to carry out the tasks under this Agreement and to procure them consistent with the terms and conditions of this Agreement and the Recipient's own procurement policies and procedures. It will also provide the Energy Commission an opportunity to review the subcontracts to ensure that the tasks are consistent with this Agreement, that the budgeted expenditures are reasonable and consistent with applicable cost principles.

**The Recipient shall:**

- Prepare a letter documenting the subcontracts required to conduct this Agreement, and submit it to the Commission Project Manager at least 2 working days prior to the kick-off meeting. If there are no subcontracts required at the start of this Agreement, then state such in the letter. If it is known at the beginning of the Agreement that subcontracts will be required during the course of the Agreement, provide in the letter:
  - A list of the subcontracts that describes the anticipated maximum budget and general scope of work for each,
  - A description of the procurement process to be used, and
  - The schedule the Recipient will follow in applying for and obtaining these subcontracts
- Submit a draft of the subcontract that will include a budget with the information required in the budget details to the Commission Project Manager for review.
- Submit a final copy of the executed subcontract.

**Products:**

- Letter describing the subcontracts needed, or stating that no subcontracts are required
- Draft subcontracts
- Final subcontracts

**TECHNICAL TASKS****TASK 2. Establish a Consumer Outreach Best Practices and Guidelines Plan**

The goal of this task is to establish a Consumer Outreach best practices and guidelines plan using existing resources to educate and inform those stakeholders who are primarily in contact with potential PEV buyers/drivers. These stakeholders include PEV driver advocates, auto dealers, electrical contractors, utility representatives, and electric vehicle service providers.

**The Recipient shall:**

- Obtain input on the draft Capital Area PEVCC best practices guidelines from PEVCC sub-committees and prepare final document.
- Disseminate the Capital Area PEVCC best practices guidelines to all the consumer stakeholders through workshops presentations to be held at locations across the six counties in the region; including but not limited to regular attendance at meetings, such as CEO roundtables, Sacramento Clean Cities forums, board and council meetings, and Chamber of Commerce meetings.

**Products:**

- Capital Area PEVCC best practices guidelines document
- Informational materials to explain PEV operating system and step-by-step process for installation of EVSE in single-family homes and multi-unit dwellings.
- Presentation package for PEVCC for the PEV best practices workshop sessions along with a report on the summary of meeting minutes from the workshops to identify common questions and answers that could be used to support future outreach activities.
- Log of workshops and presentations made.

**TASK 3 DEVELOP PEV PLANNING, BUILDING CODE AND PERMITTING PROCESS GUIDELINE AND OUTREACH FOR LOCAL AGENCIES****TASK 3.1 Review Existing PEV Readiness Efforts to Establish Regional Best Practices**

The goal of this task is to review existing PEV readiness efforts to identify the best practices that have the best fit for the Sacramento region related to planning for PEV infrastructure. This research will include all facets of PEVs, including but not limited to: building codes, permitting process, siting and pricing and will address the needs of the light duty, medium duty and heavy duty vehicle segments.

**The Recipient shall:**

- Research source materials and interview project leaders from existing subject experts such as, but not limited to, the California PEV Collaborative Infrastructure Working Group, the EV Communities Coalition, Ready Set Charge, Sonoma County, City of Portland and the State of Washington.
- Identify municipal, local agency and utility plans, policies, and processes related to PEVs in the Capital region in order to begin the process of incorporating the Best Practice Guidelines into existing procedures.
- Prepare and submit a PEV Planning Guidelines document that addresses the best practices for planning guidelines, building codes and permitting processes for PEV infrastructure.

**Products:**

- PEV Planning Guidelines document.

**TASK 3.2 Create Draft Templates for Model Ordinances and Permit Processing**

The goal of this task is to provide regional stakeholders with draft planning guidelines on planning, building codes, and permitting processes for PEV infrastructure.

**The Recipient shall:**

- Draft PEV Planning Guidelines templates and documents for regional stakeholders to review and consider for use in developing standardized permitting and planning processes.

**Products:**

- Copies of templates for distribution to regional stakeholders.

**TASK 3.3 Distribute Best Practices PEV Planning Guidelines to Regional Stakeholders**

The goal of this task is to provide regional stakeholders with draft planning guidelines on planning, building codes, and permitting processes.

**The Recipient shall:**

- Distribute PEV Planning Guidelines to all regional stakeholders in electronic and paper copies.
- Conduct workshops over a three-month period to promote discussion for final best practice PEV Planning Guidelines for consideration of adoption by local jurisdictions.

**Products:**

- Workshop materials.

**TASK 3.4 One-on-one Meetings with Individual Municipal Governments**

The goal of this task is to provide staff from local government agencies with detailed information on draft Regional Planning Guidelines and background on best practices in PEV planning, building construction codes, permitting processes, and public infrastructure planning because one-on-one follow up has been identified as one of the key best practices by the successful readiness teams to date.

**The Recipient shall:**

- Conduct one-on-one follow up meetings with individual municipal governments to establish working level adoption of PEV-related planning codes and permitting processes.

**Products:**

- Schedule of meetings for dissemination of Sacramento Regional best practice guidelines to all municipal governments.

**TASK 4 EMERGENCY RESPONDER PREPAREDNESS**

**TASK 4.1 Emergency Responder Training and Preparedness Awareness**

The goal of this task is to review existing PEV training programs for emergency and first responders and contact emergency responders/ fire marshals, fire departments and

community college districts in the six-county region to share information on PEV operations and explore training opportunities and partnerships.

**The Recipient shall:**

- Contact fire marshals and fire department training officers and local community colleges in six region area and share the presentation package for the PEV best practices.
- Work with fire departments, fire marshals, community college districts, and Sacramento Clean Cities to share information on available curriculum and identify opportunities for training partnerships.
- Disseminate available training curriculum and resources to fire departments, fire marshals and community college districts in the six-county region.
- Identify common questions and answers that could be used to support future outreach activities and curriculum development, including but not limited to, practical large scale training and training-the-trainer opportunities.

**Products:**

- Questions and answers document regarding PEVs pertinent to emergency first responders

## **TASK 5 PEV CHARGING INFRASTRUCTURE PLANNING**

### **TASK 5.1 PEV Charging Infrastructure Plan Development**

The goal of this task is to submit a report based upon, but not limited to, data and consultation from U.C. Davis on the most favorable types of public charging locations in our region. The report will include a map of existing public charging infrastructure and recommendations for future sites based on U.C. Davis developed guidelines and recommendations received from the California PEV Collaborative working group recommendations. The report will also address the PEV charging infrastructure needs of multi-unit dwellings, workplaces and fleets including survey plans.

**The Recipient shall:**

- Provide report on estimates of PEV deployment and public infrastructure needs within the region. Include methods for estimating PEV deployment. Identify need for EVSE infrastructure planning to extend publicly accessible EVSE along Interstate 80, Interstate 5, Highway 99 and Highway 50 corridors.
- Submit a report on preferred sites for publicly accessible EVSE for the six-county region. Include regional charge port infrastructure location identification, quantity, and investment required to install the infrastructure beginning in 2014, including a map of proposed infrastructure sites and a timeline for infrastructure deployment.
- Create map of publicly accessible EVSE in six-county region

- Develop region-specific guidelines for PEV infrastructure deployment for multi-unit dwellings, workplaces and fleets including surveys, education and outreach.
- Provide plan to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar.

**Products:**

- Report on estimates of PEV deployment and public infrastructure needs for the region. Map of publicly accessible EVSE in six-county region.
- Report on preferred sites for publicly accessible EVSE.
- Report on region-specific guidelines, surveys, education and outreach for PEV infrastructure deployment for multi-unit dwellings, workplaces and fleets.
- Plan to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar.

**TASK 5.2 Funding Options for Public Charging Infrastructure**

The goal of this task is to identify a list of funding options for the development of public charging infrastructure.

**The Recipient shall:**

- Create a prioritized list of low-, medium- and high--need public charging infrastructure to be used for resource allocation planning and/or business model focus
- Submit a list of options for funding public charging infrastructure including, but not limited to grants and public-private partnerships.

**Products:**

- List of public charging infrastructure needs
- List of possible funding sources

**TASK 6 CREATE DRAFT CAPITAL AREA PEV READINESS PLAN**

The goal of this task is to create a draft Capital PEV Readiness Plan, based in part on activities conducted in tasks 2 through 5, for public comment and review by the SACOG Board of Directors.

**The Recipient shall:**

- Draft the plan as components are agreed upon by the CAPEVCC. The plan will include but is not limited to addressing the following:
  - Need for a regional plan in light of other regional ongoing efforts toward PEV readiness
  - Region-specific guidelines for PEV infrastructure deployment, for residential single- and multi- dwelling units, workplace, fleets,

- commercial and public sites, and fast charging units in strategic locations
- Collection of consumer charging behavior data (in regions where such data is not being collected)
- Plan to survey potential workplace installations and fleet users
- Regional charge port infrastructure location identification, quantity, and investment required to install the infrastructure beginning in 2014, including a map of proposed infrastructure sites and a timeline for infrastructure deployment
- Region-specific planning data to support infrastructure deployment, including the use of previous studies, employer/workplace engagement, transportation studies, and estimates of PEV deployment
- Plan to survey potential workplace and fleet EVSE opportunities and conduct educational “EV 101” events
- Plan to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar.
- Ways to maximize the use of public funds for PEV charging while reducing stranded EVSE
- Plans and methods for estimating PEV deployment within the region
- Plans for the deployment of common pre-purchase EVSE installation inspection processes for PEV buyers and “hand-raisers” including:
  - Pre-installation checklist with OEMs and utilities
  - Deployment plan for pre-installation checklists with auto dealers and utilities
  - Streamlined and uniform EVSE inspection processes in collaboration with associations of building inspectors and other regional CAPEVCC stakeholders
- Plans for deployment of post-commitment streamlining for local EVSE permitting, installation and inspection process of PEV infrastructure by:
  - Local collaborative of OEMs, utilities, installers and inspectors to accelerate residential EVSE installations and meet PEV customers’ expectations
  - Outreach and education for building inspectors, utilities, facilities public works personnel and OEMs to address EVSE functions and product types, safety issues and code, inspection and compliance issues and installation process streamlining and trouble-shooting.
- Plan to accelerate PEV adoption in workplaces and private and public fleets
- Develop PEV-friendly policies and incentives, such as parking or road access (toll), price differentials and other measures as appropriate.

- Estimate GHG emissions reductions based on estimate of region's shift to PEVs
  - Plan to integrate PEV readiness and promotion policies with Sustainable Community Strategies developed under SB 375 (Steinberg, Chapter 728, Statutes of 2008).
  - Plan to attract PEV manufacturing, production, infrastructure and services of PEV development in region.
  - Plan to share existing best practices for PEV infrastructure deployment and inspection, installation and permitting guidelines as well as Americans with Disabilities Act compliance and consistent PEV charger signage with other regions of California.
  - Document sources of information or models used.
  - Research to be conducted.
  - Existing level of public awareness of the benefits of PEVs and the potential strategies to build public awareness.
  - Steps involved in carrying out a 1-2 year, 3-5 year and 5-10 year plan in terms of estimating future PEV ecosystem development needs.
- Make available the draft PEV Readiness Plan on the SACOG website for a 30 day comment period. SACOG will also send to the CEC for comment during this time.
  - SACOG will host a workshop on the draft plan and accept public comments.
  - Distribute and present a working draft of the PEV Readiness Plan to the SACOG Board.
  - CAPEVCC will review comments collected and consider for inclusion in the final PEV Readiness Plan.

**Products:**

- Draft PEV Readiness Plan
- Public workshop materials

**TASK 7 Create Final Capital Area PEV Readiness Plan**

The goal of this task is to finalize the draft plan and present it to SACOG Board of Directors for consideration.

**The Recipient shall:**

- Address comments received through public outreach, SACOG staff and Energy Commission. Present these comments to CAPEVCC for consideration in final PEV Readiness Plan.
- Prepare final PEV Readiness Plan based on direction from CAPEVCC.
- Present final PEV Readiness Plan for recommendation by the CAPEVCC to SACOG Board of Directors.

- Present final PEV Readiness Plan for consideration by SACOG Board of Directors.
- Disseminate final PEV Readiness Plan to all stakeholders and publish on the SACOG website.
- Host public workshop to announce final Capital Area PEV Readiness Plan to interested stakeholders and public at large.

**Products:**

- Final PEV Readiness Plan
- Public Workshop materials