

STATE OF CALIFORNIA

STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: San Joaquin Valley Unified air Pollution District

**RESOLVED**, that the State Energy Resources Conservation and Development Commission (Energy Commission) approves Agreement ARV-11-008 to produce a comprehensive Plug-In Electric Vehicle (PEV) Readiness Plan for the seven-county region. The plan will support the mass adoption of electric vehicles by developing plans for PEV infrastructure deployment, streamlining of permitting installation and inspection processes, and consumer education and outreach in the region. (ARFVTP funding.)  
Contact: Jared Cacho. (5 minutes)

**FURTHER BE IT RESOLVED**, that this document authorizes the Executive Director to execute the same on behalf of the Energy Commission.

**CERTIFICATION**

The undersigned Secretariat to the Commission does hereby certify that the foregoing is a full, true, and correct copy of a Resolution duly and regularly adopted at a meeting of the California Energy Commission held on March 14, 2012.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

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Harriet Kallemeyn,  
Secretariat

# GRANTS/CONTINGENT AWARD REQUEST



To: Grants and Loans Office

Date: 12 / 6 / 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)

**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: San Joaquin Valley Unified Air Pollution District

Recipient's Full Mailing Address: 1990 East Gettysburg Avenue  
Fresno, CA 93726

Recipient's Project Officer: Mr. Samir Sheikh Phone Number: (559) 230-5800 ext.

Agreement Start Date: 3 / 21 / 2012 Agreement End Date: 3 / 14 / 2014

**Amendment:** (Check all that apply) Agreement Number: ARV-11-008

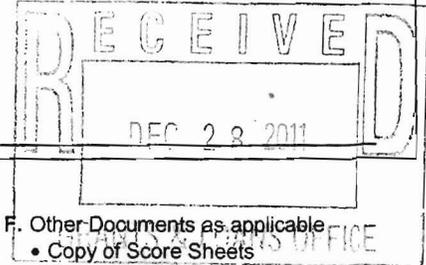
Term Extension - New End Date:  / /

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:  / /

Other: Not a project under CEQA

CEC has made CEQA finding described in CEC-280, attached

### Funding Information:

*Source #1: <u>ARFVTP</u>	Amount: <u>\$ 200,000.00</u>	Statute: <u>2011</u>	FY: <u>11-12</u>	Budget List #: <u>601.118D</u>
*Source #2: _____	Amount: <u>\$</u>	Statute: _____	FY: _____	Budget List #: _____
*Source #3: _____	Amount: <u>\$ 0.00</u>	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: 03/14/2012 2/8/11   Consent  Discussion

Business Meeting Participant: Leslie Baroody Time Needed: (5 minutes)

### Agenda Notice Statement: (state purpose in layperson terms)

Possible approval of a  Grant /  Contingent Award to...

to produce a comprehensive Plug-in electric Vehicle (PEV) Readiness Plan for the San Joaquin Valley Air Pollution Control District Region, including 7 counties, to support the mass adoption of electric vehicles by developing plans for PEV infrastructure deployment, streamlining of permitting, installation and inspection processes and consumer education and outreach.

Leslie Baroody  
Project Manager

12/6/11  
Date

  
Office Manager

12/20/11  
Date

  
Deputy Director

12/20/11  
Date

## EXHIBIT A SCOPE OF WORK

### TECHNICAL TASK LIST

Task #	Task Name
1	Administration
2	Establish Guidelines and Roles for San Joaquin Valley Plug-in Electric Vehicle Coordinating Council (PEVCC)
3	Develop San Joaquin PEV Readiness Plan Components
4	Create Draft San Joaquin Regional PEV Readiness Plan
5	Create Final San Joaquin Regional PEV Readiness Plan

### GLOSSARY

Term/ Acronym	Definition
CCSE	California Center for Sustainable Energy
CPR	Critical Project Review
Energy Commission	California Energy Commission
EVSE	Electric Vehicle Supply Equipment
FTD	Fuels and Transportation Division
GHG	Greenhouse Gases
PEV	Plug-in Electric Vehicle
PEVCC	PEV Coordinating Council
Recipient	San Joaquin Valley Air Pollution Control District
SJVAPCD	San Joaquin Valley Air Pollution Control 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 #8, 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 San Joaquin Valley’s unique geography, transportation related emissions from both northern and southern California as well as air pollution from regional population growth contribute to producing some of the worst air quality in the Nation. However, as a result of the San Joaquin Valley Air Pollution Control District’s (SJVAPCD) progressive leadership, region-wide emission levels have dropped significantly since 1990. This downward trend in emissions is a direct result of a combination of strategies employed by the SJVAPCD including robust regulatory changes, incentive programs and significant outreach and education throughout the Valley. However, continuing this trend will be extremely difficult without the future adoption of PEVs throughout the region. SJVAPCD will use this grant to lay the foundation for on-going, coordinated regional planning to enable widespread PEV deployment.

The SJVAPCD will establish the San Joaquin Valley Regional Plug-in Electric Vehicle Coordinating Council (PEVCC) that includes member commitments from four regional public agencies—Merced County Association of Governments, Fresno Council of Governments, Tulare County Association of Governments and San Joaquin Council of Governments. The SJVAPCD also has member commitments from AeroVironment – an electric vehicle infrastructure provider. The SJVAPCD will serve as the lead public entity authorized to accept and administer the award on behalf of the PEVCC.

**Problem Statement:**

The SJVAPCD and other regional stakeholders have identified that poor air quality within the region presents the most pressing need for robust PEV deployment. In order to encourage PEV deployment in the region several challenges and barriers must be overcome. These barriers include the lack of regional planning for PEVs and PEV infrastructure, lack of external investment in PEVs within the region, lack of regional

EVSE mapping, lack of consistent permitting and inspection guidelines as well as the need for robust outreach and education to various stakeholders within the region. The formation of the regional PEV Coordinating Council (PEVCC) will help to coordinate a wide range of stakeholders to address the barriers and make recommendations for future planning activities.

### **Goals of the Agreement:**

The goal of this Agreement is to develop a regionally-accepted comprehensive PEV Readiness plan. This plan will provide a foundation for PEV Readiness/EVSE planning and address barriers to PEV adoption through best practices and recommendations across all domain areas. The PEVCC will provide coordination and outreach to efficiently and effectively communicate best practices to all jurisdictions and multiple stakeholders involved in PEV readiness throughout the region.

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

1. Develop guidelines and goals for the PEVCC
2. Ensure that the PEVCC addresses multiple facets of PEV Readiness including, but not limited to, the following:
  - EVSE deployment in residential, commercial, multi-unit dwellings and the workplace
  - Regional mapping and siting of public EVSEs and DC Fast Chargers along transportation corridors
  - Commercial and public fleet outreach, and
  - Consumer education of available incentives
3. Build support for the PEV readiness plan through strong collaboration and coordination between each of the eight counties in the region. Work with each county to address intra-regional challenges and opportunities for PEV deployment.
4. Provide a plan to communicate about PEV and EVSE efforts in the region.
5. Develop and publish agenda packets prior to each PEVCC meeting in an effort to stimulate robust discussion.
6. Create and publish reports on multiple aspects of regional PEV readiness, which will include but not be limited to the following:
  - Siting and mapping procedure for public (level 2/Fast Charging) and workplace charging.
  - Permitting and inspection guidelines for residential and public charging infrastructure.
  - Available consumer incentives for PEVs and EVSE
  - Connection with existing land-use rules and guidelines as well as incorporation of the PEV Plan into Sustainable Communities Strategy and green house gas (GHG)/public health benefits of PEVs to the region.
7. For each PEVCC readiness component, create and publish a set of recommendations and best practices through on-line information sheets to help guide on-going region-specific transportation planning efforts through the SJVAPCD PEVCC website.
8. Integrate PEVCC goals into the regional transportation plans and land-use plans of each of the eight Counties within the region.

9. Communicate and coordinate regularly with more advanced regions regarding best practices and lessons learned from existing PEV deployment plans and consider inter-regional transportation corridors.
10. Receive SJVAPCD Board of Directors adoption of a PEV readiness plan prior to the end date of the agreement with the Energy Commission.

## **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)
- Sub-contracts 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 Guidelines and Roles for the San Joaquin Valley PEVCC**

The goals of this task are to establish guidelines and roles for PEVCC members, provide clear participatory, operating and communication guidelines for the PEVCC and ensure that all components have been reviewed and discussed at PEVCC meetings.

**The Recipient shall:**

- Formalize PEVCC mission and charter.
- Provide clear direction and guidelines for PEVCC participants including agenda topics, meeting schedule and dissemination of information.
- Develop 24 month plan to address all plan components including a timeline and priorities for all technical tasks and PEVCC meetings.

**Products:**

- PEVCC mission and charter
- PEVCC participant guidelines and roles
- Meeting schedule and agenda topics for each of the 24 PEVCC meetings
- Timeline and priorities for all technical tasks and PEVCC meetings.

### **TASK 3 Develop San Joaquin Valley PEV Readiness Plan Components**

The goal of this task is to create and share recommended best practice guidelines for all PEV Regional readiness components. These guidelines will form the basis for the draft PEV Readiness Plan.

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

- Document lessons learned and research conducted from more advanced PEV regions such as San Diego, the Bay Area, and Los Angeles—and disseminate to the PEVCC.
- Create recommendations based on PEVCC input into easy to understand guidelines for all PEV readiness elements including EVSE installation in residential, commercial, multi-unit dwellings and workplace areas; as well as EVSE impacts to workforce and economic development, use of incentives to drive consumer demand, and the evaluation of environmental benefits throughout the region.
- Create best practices fact sheets for all readiness components as they are approved at PEVCC meetings and published on SJVAPCD and CCSE websites.
- Hold workshops and other outreach events regarding PEV components to targeted consumers throughout the region. SJVAPCD and CCSE will coordinate materials, for example PEV and PEV infrastructure incentives with permitting and inspection guidelines, thereby educating these consumers more efficiently.

#### **Products:**

- Guidelines for EVSE installation
- EVSE installation impacts report on workforce and economy
- Report on the use of incentives to encourage consumer PEV demand
- Report on environmental benefits resulting from PEV deployment in Region
- Best practices fact sheets for all PEV readiness components
- Periodic Summary Reports that include a description of presentations and additional marketing material for workshops and public outreach.

### **TASK 4 Create Draft San Joaquin Valley REGIONAL PEV Readiness Plan**

The goal of this task is to create a draft San Joaquin PEV Readiness Plan for public comment and review by the SJVAPCD Board of Directors.

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

- Draft the plan as components are agreed upon by the PEVCC. 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
  - Identification of issues to be considered in the deployment of infrastructure guidelines

- 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
- Survey of 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
- Survey potential workplace and fleet EVSE opportunities and conduct educational “EV 101” events
- Mitigation of “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
- Estimation of PEV deployment within the region
- 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 PEVCC stakeholders
- 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.
- Acceleration of PEV adoption in workplaces and private and public fleets
- Development of PEV-friendly policies and incentives, such as parking or road access (toll), price differentials and other measures as appropriate.
- Estimating GHG emissions reductions based on estimate of region’s shift to PEVs
- Integration of 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.
  - Development of a 1-2 year, 3-5 year and 5-10 year plan in terms of estimating future PEV ecosystem development needs.
- PEVCC will make available the draft PEV Readiness Plan on SJVAPCD and CCSE websites for a 30 day comment period. SJVAPCD will also send to the Energy Commission for comment during this time.
  - SJVAPCD will host a workshop on the draft plan and accept public comments.
  - PEVCC will disseminate and present a working draft of the PEV Readiness Plan to the SJVAPCD Board.
  - PEVCC will review comments collected and consider for inclusion in the final PEV Readiness Plan.

**Products:**

- Draft PEV readiness plan
- Draft Public workshop materials including but not limited to the meeting notice, presentations, and documentation of public comments

**TASK 5 Create Final San Joaquin Valley REGIONAL PEV Readiness Plan**

The goal of this task is to finalize the draft plan and receive acceptance from SJVAPCD Board of Directors.

**The Recipient shall:**

- Address comments received through public outreach, SJVAPCD staff and Energy Commission and present these comments to PEVCC for consideration in final plan.
- Prepare final draft based on direction from PEVCC.
- Present final draft for recommendation by the PEVCC to SJVAPCD Board of Directors.
- Present final plan for consideration by SJVAPCD Board of Directors.

- Disseminate final PEV Readiness Plan to all stakeholders and publish on SJVAPCD and CCSE websites.
- Host public workshop to announce San Joaquin Valley PEV Readiness Plan to interested stakeholders and public at large.

**Products:**

- Final PEV readiness plan
- Final Public Workshop materials including but not limited to the meeting notice, presentations, and documentation of public comments

## EXHIBIT A-1

### Schedule of Products and Due Dates

Task Number	Task Name	Product(s)	Due Date
1.1	<b>Attend Kick-off Meeting</b>	Updated Schedule of Products	2 days prior to kick-off
		Updated List of Match Funds	2 days prior to kick-off
		Updated List of Permits	2 days prior to kick-off
		Kick-Off Meeting Agenda (CEC)	2 days prior to kick-off
1.2	<b>Critical Project Review Meetings</b>	1st CPR CPR Report	12/5/2012
		Meeting Written determination (CEC)	12/19/2012
1.3	<b>Final Meeting</b>	Written documentation of meeting agreements	2/11/2014
		Schedule for completing closeout activities	3/14/2014
1.4	<b>Monthly Progress Reports</b>	Monthly Progress Reports	The 10th calendar day after each month during the approved term of this Agreement
1.5	<b>Final Report</b>	Draft Outline of Final Report	10/1/2013
		Final Outline of the Final Report	11/1/2013
		Draft Final Report	12/2/2013
		Final Report	2/3/2014
1.6	<b>Identify and Obtain Match Funds</b>	A letter regarding match funds or stating that no match funds are provided	2 days prior to kick-off
		Copy(ies) of each match fund commitment letter(s) (if applicable)	2 days prior to kick-off
		Letter(s) for new match funds (if applicable)	Within 10 days of identifying new match funds
		Letter that match funds were reduced (if applicable)	Within 10 days of identifying reduced match funds
1.7	<b>Identify and Obtain Required Permits</b>	Letter documenting the permits or stating that no permits are required	2 days prior to kick-off
		A copy of each approved permit (if applicable)	Within 10 days of receiving each permit
		Updated list of permits as they change during the term of the Agreement (if applicable)	Within 10 days of change in list of permits
		Updated schedule for acquiring permits as changes occur during the term of the Agreement (if applicable)	Within 10 days of change in schedule for obtaining permits
1.8	<b>Obtain and Execute Subcontracts</b>	Letter describing the subcontracts needed, or stating that no subcontracts are required	2 days prior to kick-off
		Draft subcontracts	15 days before the scheduled execution date

# EXHIBIT A-1

Final subcontracts	Within 10 days of execution
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## EXHIBIT A-1

<b>2</b>	<b>ESTABLISH GUIDELINES AND ROLES FOR SAN JOAQUIN VALLEY PEVCC</b>	
	PEVCC mission and charter	5/11/2012
	PEVCC participant guidelines and roles	4/30/2012
	Meeting schedule, agenda topics for each of the 24 PEVCC meetings	6/15/2012
	Timeline and priorities for all technical tasks and PEVCC meetings.	6/15/2012
<b>3</b>	<b>DEVELOP SAN JOAQUIN VALLEY REGIONAL PEV READINESS PLAN COMPONENTS</b>	
	Guidelines for EVSE installation	Ongoing: within 15 days of item's PEVCC meeting
	EVSE installation impacts report on workforce and economy	Ongoing: within 15 days of item's PEVCC meeting
	Report on the use of incentives to encourage consumer PEV demand	Ongoing: within 15 days of item's PEVCC meeting
	Report on environmental benefits resulting from PEV deployment in Region	Ongoing: within 15 days of item's PEVCC meeting
	Best practices fact sheets for all PEV readiness components	Quarterly beginning 6/1/2012
	Periodic Summary Reports that include a description of presentations and additional marketing material for workshops and public outreach	Ongoing throughout the development of PEV Readiness Components
<b>4</b>	<b>CREATE DRAFT SAN JOAQUIN VALLEY REGIONAL PEV READINESS PLAN</b>	
	Draft PEV readiness plan	11/8/2013
	Draft public workshop materials	12/13/2013
<b>5</b>	<b>CREATE FINAL SAN JOAQUIN VALLEY REGIONAL PEV READINESS PLAN</b>	
	Final PEV readiness plan	2/3/2014
	Final public workshop materials	3/3/2014