

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: SOUTHERN CALIFORNIA ASSOCIATION OF
GOVERNMENTS

RESOLVED, that the State Energy Resources Conservation and Development Commission (Energy Commission) approves Agreement ARV-11-007 for a grant of \$200,000 to the Southern California Association of Governments to produce a comprehensive plug-in electric vehicle (PEV) readiness plan, including two sub-regional plans for the Southern California Association of Governments' six-county region. The plan will support the mass adoption of electric vehicles by developing plans for PEV infrastructure deployment, among other activities. (ARFVTP funding.)

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 February 8, 2012.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

Harriet Kallemeyn,
Secretariat

GRANTS/CONTINGENT AWARD REQUEST



To: Grants and Loans Office

Date: 2 / 23 / 2012

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: ARV-11-007 Office

Program: Alternative and Renewable Fuel and Vehicle Technology Program

Solicitation Name and/or Number: PON 10-602

Legal Name of Recipient: Southern California Association of Governments

Recipient's Full Mailing Address: 818 West 7th Street, 12th Floor,
Los Angeles, CA 90017

Recipient's Project Officer: Jennifer Sarnecki Phone Number: (213) 236-1829 ext.

Agreement Start Date: 6 / 1 / 2012 Agreement End Date: 3 / 14 / 2014

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: _____ / /

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: 2011 FY: 11-12 Budget List #: 601.118D

*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: 04 / 11 / 2012 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 the Southern California Association of Governments for \$200,000 (Agreement # _____) to produce a comprehensive Plug-in electric Vehicle (PEV) Readiness Plan, including two sub-regional plans for the Southern California Association of Governments 6 county Region. This plan will support the mass adoption of electric vehicles by developing plans for PEV infrastructure deployment among other activities.

Leslie Baroody 2/24/12
Project Manager Date

[Signature]
Office Manager

2/24/12
Date

Pat Perry
Deputy Director

2/27/12
Date

EXHIBIT A Scope of Work

TASK LIST

Task #	Task Name
1	Administration
2	Maintain a Plug-in Electric Vehicle Coordinating Council
3	Model Subregional PEV Readiness Plans
4	Regional PEV Readiness Planning
5	Develop Educational Materials and Education Campaign

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
BEV	Battery Electric Vehicle
CPI	Charge Port Infrastructure
CPR	Critical Project Review
Energy Commission	California Energy Commission
EVSE	Electric Vehicle Supply Equipment
FTD	Fuels and Transportation Division
GHG	Greenhouse gas
PEV	Plug-In Electric Vehicle
PHEV	Plug-in Hybrid Electric Vehicle
PON	Program Opportunity Notice
SBCCOG	South Bay Cities Council of Governments
SCAG	Southern California Association of Governments
SCAQMD	South Coast Air Quality Management District
SCE	Southern California Edison
SCS	Sustainable Communities Strategy
SoCalPEVCC	Southern California Plug-In Electric Vehicle Coordinating Council
Recipient	Southern California Association of Governments
UCLA	University of California, Los Angeles
WRCOG	Western Riverside Council of Governments

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 Program Opportunity Notice (PON)-10-602 to provide funding opportunities under the ARFVT Program 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 #7, 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 Southern California Association of Governments (SCAG) is the nation's largest metropolitan planning organization, representing six counties, 191 cities and more than 18 million residents. SCAG undertakes a variety of planning and policy initiatives to encourage a more sustainable Southern California now and in the future.

SCAG and its regional project partners have agreed to maintain a Southern California Plug-In Electric Vehicle Coordinating Council (SoCalPEVCC). The SoCalPEVCC will include the following core partners: SCAG, South Coast Air Quality Management District (SCAQMD), Southern California Edison (SCE), South Bay Cities Council of Governments (SBCCOG) and Western Riverside Council of Governments (WRCOG). This partnership will also include many cities and counties including the City and County of Los Angeles, as well as other public and private stakeholders. All stakeholders will be working together to develop a regional PEV Readiness Plan. The SoCalPEVCC's foremost goal is to provide a forum to oversee the regional PEV Readiness Plan. Its secondary goal is to share data and information.

SCAG Planning Region



SCAG is made up of 6 Counties which are divided into 14 subregions.
 Maps included in this report are produced in whole or in part from THOMAS BROS. MAPS digital database.
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The proposed project will focus on cities within the subregions of SBCCOG and WRCOG (please see the map below for the location of each subregion). SBCCOG includes the following jurisdictions: Carson, El Segundo, Gardena, Hawthorne, Hermosa Beach, Inglewood, Lawndale, Lomita, Manhattan Beach, Palos Verdes Estates, Rancho Palos Verdes, Redondo Beach, Rolling Hills, Rolling Hills Estates, Torrance, the Harbor City/San Pedro communities of the City of Los Angeles and the County Unincorporated Areas of the South Bay. WRCOG includes the following jurisdictions: City of Banning, City of Calimesa, City of Canyon Lake, City of Corona, City of Eastvale, City of Hemet, City of Lake Elsinore, City of Menifee, City of Moreno Valley, City of Murrieta, City of Norco, City of Perris, City of Riverside, City of San Jacinto, City of Temecula, City of Wildomar, County of Riverside. The project will generally include jurisdictions within the Southern California Association of Governments region (counties of Ventura, Los Angeles, Riverside, San Bernardino, Imperial, and Orange) as it develops guidelines for PEV Readiness activities.

The proposed project will be coordinated with the DOE project, California Plug-in Electric Vehicle Readiness Project. The DOE funds will be utilized in the completion of a Regional PEV Readiness Plan that will complement the two subregional plans prepared with the CEC grant.

Problem Statement

PEVs first arrived in Southern California in 2011 with projected market expansion to the mass market. A recent study from the University of California, Los Angeles (UCLA) Luskin Center projects a significant influx of PEVs and plug-in hybrid-electric vehicles (PHEVs) in the Southern California region – as many as 400,000 PEVs and PHEVs by the end of 2014. To accommodate this increase, a significant expansion of charging infrastructure is needed throughout the region.

Goals of the Agreement

The goal of this Agreement is to complete two subregional plans for Southern California that will serve as models for subsequent research, to accelerate and streamline the deployment of PEVs in Southern California while promoting economic development within the green technology sector. This goal will be met through extensive collaboration and education, which will be facilitated by the SoCalPEVCC.

Objectives of the Agreement

The objectives of this Agreement are to:

- Collaborate with the DOE project, *California Plug-in Electric Vehicle Readiness Project*.
- Develop a clear understanding of the market forces that will impact regional PEV readiness regarding the quantity and cost of a regional charge port infrastructure (CPI) system. Market forces include vehicle and electric vehicle service equipment types, quantity, charging specifications, launch date and projected quantities.

- Analyze available driver behavioral information, develop appropriate recommendations and apply those recommendations in the development of a final infrastructure plan and budget.
- Analyze region-specific travel patterns in various representative subregions in the Southern California area and prepare model subregional plans describing these analyses. Southern California is a complex region that includes diverse development patterns, including dense urban infill areas, rural subdivisions and sparsely populated desert regions. This necessitates the study of several representative areas in order to understand travel patterns. Utilizing existing data from select subregions (SBCCOG, WRCOG) as a framework, model subregional plans would be developed to discuss findings in other regions of Southern California.
- Conduct meaningful education and outreach to support the successful deployment of regional charge port infrastructure, building from the lessons learned from the current PEV Coordinating Council member's education and outreach efforts that have been in place for the past 18 months.
- Develop guidelines for PEV infrastructure deployment for single and multi-family unit housing stock, workplaces, fleets, commercial and public sites, and fast charging units in strategic locations.
- Conduct bi-monthly public meetings to broaden participation in regional PEV planning efforts.
- Ensure the SoCalPEVCC addresses all facets of PEV Readiness including EVSE deployment in residential, commercial, multi-unit dwelling, and workplace and siting of DC Fast Charging stations; commercial fleet outreach and consumer education of available incentives.
- Form an electronic distribution list to members and interested stakeholders.
- Develop and publish comprehensive agenda packets prior to each SoCalPEVCC meeting.
- Create and publish background/briefing and issue reports on all aspects of regional PEV readiness, which will include but is not limited to public-access charging, DC Fast Charging deployment, and greenhouse gases (GHG) reduction opportunities.
- For each SoCalPEVCC Readiness domain area create and publish a timely set of recommendations and best practices through on-line information sheets to help guide on-going region-specific transportation planning efforts through SCAG website.
- Conduct outreach to adjacent regional border entities (i.e., San Diego, Riverside, Imperial and Orange Counties and sovereign Tribal Nations) regarding PEV readiness to transportation corridors.
- Share regional lessons at state and national level.
- Facilitate and make available additional research including:
 - a) Cost of EVSE installations
 - b) Time to install EVSEs
 - c) Forecast of trends beyond initial "first wave" adopters
 - d) Environmental benefits including air quality, petroleum and GHG reductions
 - e) Smart grid integration including demand response and renewable generation

- Publish final PEV Readiness Plan for approval by SCAG Board of Directors.

In order to quantify the objectives, the following performance metrics will be used:

1. Maintain the SoCal PEVCC with the Southern California Association of Governments, South Coast Air Quality Management District, Southern California Edison, Western Riverside Council of Governments, and South Bay Cities Council of Governments.
2. Complete a Southern California Regional PEV Readiness Plan Complete two model subregional PEV Readiness Plans that can be replicated throughout similar regions. Hold at least four educational “EV 101” events (two in WRCOG and two in the SBCCOG)
3. Integrate the PEV readiness and promotion policies into SCAG’s Sustainable Communities Strategy developed under SB 375 (Steinberg, Chapter 728, Statutes of 2008) and calculate GHG emission benefits based on the shift to PEVs.

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 (CPR) (Task 1.2).
- Match fund documentation (Task 1.6) .
- 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).
- Discussion of the Final Report (Task 1.5).

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

Recipient's Products:

- Updated Schedule of Products.
- Updated List of Match Funds.
- Updated List of Permits.

Commission Project Manager's Product:

- Kick-Off Meeting Agenda.

Task 1.2 Critical Project Review 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's Products:

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

Recipient's 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.
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- 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.
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- The technical portion of the meeting shall present 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. The Commission Project Manager will determine the appropriate meeting participants.
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- The administrative portion of the meeting shall be a discussion with the Commission Project Manager and the Grants Officer about the following Agreement closeout items:
 - 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).
 - “Surviving” Agreement provisions.
 - Final invoicing and release of retention.
- Prepare a schedule for completing the closeout activities for this Agreement.

Recipient’s 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, partners, or subcontractors 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.

Recipient’s 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 a draft outline of the Final Report and submit to the Commission Project Manager for approval.
- Prepare a Draft Final Report following the approved final 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.
- Prepare a Final Report incorporating the Commission Project Manager's comments. 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.

Recipient's 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 calendar 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.

Recipient's 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.

Recipient's 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.

Recipient's Products:

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

TECHNICAL TASKS

TASK 2 MAINTAIN A PLUG-IN ELECTRIC VEHICLE COORDINATING COUNCIL

The goal of this task is to maintain and to provide clear participatory, operating, and communication guidelines for the SoCalPEVCC. This task will also include staffing for the SoCalPEVCC to provide oversight for the project and create a forum to share information. The SoCalPEVCC will guide the development of the PEV Readiness Plan including the subregional plans for WRCOG and SBCCOG. Following completion of this Agreement, the SoCalPEVCC will continue to meet in order to help produce subsequent plans and assist all interested subregions in developing detailed CPI maps.

The Recipient shall:

- Maintain the SoCalPEVCC by providing staffing, setting and holding meetings, developing agendas and minutes, and other tasks related to meeting set-up as needed.
- Invite additional members as needed to enrich the PEV Readiness planning process and broaden the discussions. Prepare membership roster.
- Formalize SoCalPEVCC mission and charter.
- Provide clear direction and guidelines for SoCalPEVCC participants including agendas, schedules, dissemination of information, public access and comments, and roles for each SoCalPEVCC member.
- Provide a detailed timeline for drafting the Southern California Regional PEV Readiness Plan.

[Before this task begins, all relevant subcontracts must be executed. See Task 1.8 for details.]

Recipient's Products:

- Final SoCalPEVCC Mission Statement
- Final SoCalPEVCC Charter.
- Membership roster.
- Agendas and Minutes from each of 12 SoCalPEVCC meetings.
- Meeting materials and information related to PEV readiness via SCAG, SCAQMD, SCE, WRCOG, and SBCCOG websites.
- Timeline report.

TASK3 MODEL SUBREGIONAL PEV READINESS PLANS**Task 3.1 Western Riverside Council of Governments Subregional PEV Readiness Plan**

The goal of this task is to develop a model subregional plan that will provide complementary data and information to the Southern California Regional PEV Readiness Plan. This task will create and recommend best practice guidelines across all PEV Regional readiness components and domain areas to optimize future regional investments in a range of areas including infrastructure deployment, PEV-friendly buildings, consumer incentives, environmental benefits to the region, and EVSE installations along interregional transportation corridors.

The Recipient shall:

- Document and share lessons from prior PEV planning efforts and share all research conducted to date with the SoCalPEVCC and other regions.
- Conduct a literature review that addresses and identifies the need for a subregional plan in light of other regional on-going efforts toward PEV readiness. This will include an assessment of subregional databases, to estimate travel patterns in WRCOG.
- Collect information relevant to CPI Planning from existing subregional databases.
- Utilize existing databases and geographic information systems capabilities in WRCOG to support this effort.
- Describe the data available for the subregion and how it can assist with CPI Planning. For example, WRCOG completed four-city study in 2010 that evaluated how small electric vehicles could fit into the region's road network.
- This will include sub-regional planning data to support infrastructure deployment, including the use of previous studies (such as SCE's market studies to be conducted in collaboration with this study), employer/workplace engagement, transportation studies, and estimates of PEV deployment.
- Create recommendations based on SoCalPEVCC input 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.
- Assess the PEV market supply and demand in WRCOG.
- Assess the PEV readiness of the housing stock in WRCOG.

- Assess the subregional institutional readiness (permitting, installation, pre-installation checklists, inspection, and training) and the existing level of consumer knowledge regarding the costs and benefits of PEVs and potential strategies to increase public knowledge and awareness.
- Lead in designing and executing a survey of WRCOG's 16 incorporated cities and the county.
- Analyze the PEV readiness of prime destinations.
- Collaborate with WRCOG member jurisdictions to determine their levels of awareness, status of plans for charger installation, and barriers to installation.
- Develop guidelines for use in an educational campaign and materials for the subregion in coordination with the local Clean Cities Coalition and the SoCalPEVCC, 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.
- Develop an educational component working with its Clean Cities Coalition to include additional PEV education and outreach in WRCOG.
- Develop a CPI deployment plan including the location, quantity and investment required in WRCOG to install CPI beginning in 2014, including a map of proposed installation sites and a timeline for CPI deployment.
- Develop a plan to collect data on consumer charging behavior in WRCOG region.
- Develop and promote PEV guidelines and plans for deployment of EVSE infrastructure regarding permitting, installation, deployment, maintenance, and inspection.
- Prepare and submit a subregional PEV Readiness Plan for WRCOG.
- Synthesize the WRCOG sub regional plan with the Regional PEV Readiness Plan.

Recipient's Products:

- WRCOG PEV Readiness Plan.

Task 3.2 South Bay Cities Council of Governments Subregional PEV Readiness Plan

The goal of this task is to develop a model subregional plan that will provide complementary data and information to the Southern California Regional PEV Readiness Plan. This task will create and recommend best practice guidelines across all PEV Regional readiness components and domain areas to optimize future regional investments in a range of areas including infrastructure deployment, PEV-friendly buildings, consumer incentives, environmental benefits to the region, and EVSE installations along interregional transportation corridors.

The Recipient shall:

- Document and share lessons from prior PEV planning efforts and share all research conducted to date with the SoCalPEVCC and other regions.

- Conduct a literature review that addresses and identifies the need for a subregional plan in light of other regional ongoing efforts toward PEV readiness. This will include an assessment of subregional databases, to estimate travel patterns in SBCCOG.
- Collect information relevant to CPI Planning from existing subregional databases.
- This will include sub-regional planning data to support infrastructure deployment, including the use of previous studies (such as SCE's market studies to be conducted in collaboration with this study), employer/workplace engagement, transportation studies, and estimates of PEV deployment.
- Utilize at least three of its databases that could provide guidance to the regional effort, including travel and charge patterns, from the Local Use Vehicle Demonstration Project.
- Create recommendations based on SoCalPEVCC input 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.
- Assess the PHEV and battery electric vehicle (BEV) market supply and demand in SBCCOG.
- Develop a refined estimate by geography and vehicle type that will serve as the basis for the subregional CPI Plan.
- Assess the PEV readiness of the housing stock in SBCCOG.
- Conduct a detailed study of the residential CPI in the South Bay, especially in those Census tracts expecting large numbers of sales, near term sales, or both.
- Assess the subregional institutional readiness (permitting, installation, pre-installation checklists, inspection, and training) and the existing level of consumer knowledge regarding the costs and benefits of PEVs and potential strategies to increase public knowledge and awareness.
- Survey the 15 incorporated cities in the South Bay regarding their PEV knowledge and readiness levels.
- Analyze the PEV readiness of prime destinations.
- Collaborate with SBCCOG member jurisdictions to determine their levels of awareness, status of plans for charger installation, and barriers to installation.
- Develop guidelines for use in an educational campaign and materials, in collaboration with the SoCalPEVCC, specific to the subregion related to BEVs and Neighborhood Electric Vehicles, 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.
- In collaboration with the SoCalPEVCC, subregion specific materials will be developed, specifically related to BEVs and Neighborhood Electric Vehicles.
- Develop a CPI deployment plan including the location, quantity and investment required in SBCCOG to install CPI beginning in 2014, including a map of proposed installation sites and a timeline for CPI deployment.

- Develop a plan to collect data on PEV consumer charging behavior in SBCCOG including PHEV and BEV sales.
- Utilize the lessons learned in the ECOTality/American Recovery and Reinvestment Act Leaf Project in San Diego.
- Estimate GHG emission reductions from the estimated deployment of PEVs in SBCCOG.
- Utilize the existing Local Use Vehicle Demonstration project's methodology for estimating GHG and criteria pollutant emissions for subregional-specific results, in collaboration with the SoCalPEVCC.
- Assess the existing level of consumer knowledge regarding the costs and benefits of PEVs and potential strategies to increase public knowledge and awareness.
- Develop plans to accelerate PEV purchases beyond the initial forecast for SBCCOG.
- Develop and promote PEV readiness guidelines for developing PEV-friendly buildings and public works in consultation with the SoCalPEVCC.
- Develop policy PEV readiness recommendations for consideration into SCAG's Sustainable Communities Strategy (SCS) required by SB 375.
- Include applicable strategies from the existing Sustainable South Bay Strategy.
- Develop an outreach and education plan that would accelerate PEV adoption in private and public fleets in the South Bay.
- Prepare a catalogue of suitable educational materials (presentations, brochures, web material).
- Develop and promote PEV guidelines and plans for deployment of EVSE infrastructure collaboration regarding permitting, installation, deployment, maintenance, and inspection.
- Prepare and submit a sub regional PEV Readiness Plan for SBCCOG.
- Synthesize the SBCCOG sub regional plan with the Regional PEV Readiness Plan.

Recipient's Products:

- SBCCOG PEV Readiness Plan.

TASK 4 REGIONAL PEV READINESS PLANNING

Task 4.1 Regional Planning Study Analysis – Literature Review

The goal of this task is to prepare a literature review which includes an evaluation and analysis of existing studies and identifies information needed in order to accomplish the overall goals and objectives of this study.

The Recipient shall:

- Identify, collect and analyze literature resources, and compile results in a Literature Review Report.
- Review and assess regional databases for information relevant to PEV readiness planning in light of other regional ongoing efforts toward PEV readiness. The

review will also assess existing versus needed data (including SCAG regional travel studies and modeling data, Census Planning Transportation Package data, Caltrans Household Survey, SBCCOG Transportation Study, regional planning studies from transportation agencies, SCAQMD traffic planning, individual city traffic studies and California Fuel Cell Partnership Hydrogen Infrastructure Location Analysis).

- Prepare a report on the data needs related to PEV readiness planning.

Recipient's Products:

- Literature Review Report.
- Data Needs Report.

Task 4.2 Market Assessment and Needs Requirements

The goal of this task is to develop a projection of the size of the regional PEV market.

The Recipient shall:

- Document the assumptions used to project market penetration for PEVs.
- Utilize SCE market projections (which include public and private sector market analyses), recent UCLA studies and the California PEV Collaborative numbers, since this data has been reviewed by industry stakeholders.
- Review various vehicle specifications, range, and charge requirements.
- Provide documentation for all assumptions.
- Evaluate the accuracy of existing data and assumptions.
- Identify vehicles projected for a California market launch including the number and type based on public documents.
- Prepare and submit a Memorandum on the projected penetration of PEVs in Southern California based on the data and analyses conducted in this task.

Recipient's Products:

- Memorandum of the Projected Penetration of PEVs in Southern California.

Task 4.3 Consumer Behavioral Analysis

The goal of this task is to determine potential driving patterns and charging scenarios to help identify early buyer motivations and barriers to PEV equipment installation.

The Recipient shall:

- Complete a Non-Residential/Non-Single Family Home Charging Assessment which provides a comprehensive assessment of key non-residential/non-single family home segments (commercial, government & institutions, industrial, mid-market) across the different charging scenarios (multi-family, fleets, workplace, customer/visitor) to inform the development of effective PEV oriented education and outreach tools. The focus will be on identifying the information needs of these customers to accelerate PEV adoption in workplaces, private and public fleets, and multi-family housing units.
- Complete an Early Buyer Study based on behaviors and attitudes of PEV Early Adopters to establish early indicators of mass adoption charging (in-home and

away- from- home) and driving behavior while identifying underlying motivations. This study would provide an indication of away -from -home charging needs based on charging situations/scenarios, vehicle type/battery range, availability of charging infrastructure, driving/commute patterns, and early buyer motivations.

- Survey potential workplace installations and fleet users through a series of focus groups in key locations throughout Southern California.

Recipient's Products:

- Non-Residential/Non-Single Family Home Charging Assessment.
- Early Buyer Study.

Task 4.4 Regional PEV Readiness Plan

One goal of this task is to assess the readiness of those centers likely to be the prime destinations of PEV drivers and integrate lessons learned from the market study and consumer behavior analysis. An outcome of these efforts will be a final report that enables public policy makers and private sector entities to understand the magnitude of the public charge requirements for the region and to accelerate PEV adoption in multi-unit dwellings, workplaces, and private and public fleets and highway corridors. This will allow for wise investments on an appropriate level of infrastructure at the appropriate times and locations and to plan for the region to solicit state and federal funds necessary to build out the recommended infrastructure.

A second goal of this task will be integrating the model subregional plans into a regional infrastructure plan that will be available for public comment and internal review by the Recipient.

A third goal will be to estimate the GHG emission reductions that can be expected in Southern California from the deployment of anticipated PEVs.

The Recipient shall:

- Create and submit for approval to Recipient's Board of Directors a Regional PEV Infrastructure Deployment Plan that shall include, but is not limited to the following:
 - Synthesize findings from the Task 4.2 market study and Task 4.3 consumer behavior analysis.
 - 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.
 - Plan to survey potential workplace installations and fleet users.
 - Ways to maximize the use of public funds for PEV charging while reducing stranded EVSE.
 - Develop policy recommendations for location of charging infrastructure, including quantity, investment needed, and a timeline for infrastructure deployment. This includes guidelines for pre-purchase EVSE installation inspection (pre-installation checklist with OEM and utilities, deployment plan

- Incorporate model subregional plans into the Regional PEV Infrastructure Deployment.
- Create and submit a map and timeline of the recommended PEV infrastructure needs and CPI locations, quantity, and investment required to install the infrastructure beginning in 2014.
- Plan for estimating future PEV ecosystem development needs over 1-2 years, 3-5 years, and 5-10 years.
- Prepare and submit a table of the estimated GHG emission reductions that can be expected in Southern California from the deployment of anticipated PEVs and identify a plan to integrate PEV readiness and promotion policies within future SCSs.
- Identify potential PEV-friendly policies and incentives, such as parking or road access (toll), price differentials and other measures as appropriate.
- Develop a plan to mitigate on-peak PEV charging, including the use of battery storage and renewable energy.
- Develop a plan to attract PEV manufacturing, production, infrastructure and services in region.
- Document sources of information or models used.
- Research to be conducted.
- Publish the draft PEV Readiness Plan on the SCAG, SCAQMD, SCE, WRCOG, and SBCCOG websites for a 30 day comment period.
- Submit draft of the PEV Readiness Plan to the Energy Commission for comment.
- Host a workshop on the draft plan and accept public comments.
- Compile and submit comments in a single document for easy reference.
- Prepare and submit workshop minutes.
- Disseminate and present a working draft of the PEV Readiness Plan to the Recipient's Board of Directors.
- Review comments collected and consider for inclusion in the final PEV Readiness Plan.

Recipient's Products:

- Southern California Regional PEV Readiness Plan.
- Regional map of recommended PEV infrastructure needs and charge port locations.
- A table of GHG reduction forecasts and a plan to integrate PEV readiness and promotion of policies within future SCSs.
- Comments and minutes from the workshop.

TASK 5 DEVELOP EDUCATIONAL MATERIALS AND EDUCATION CAMPAIGN

Task 5.1 Share Guidelines and Best Practices with other subregions and regions

The goal of this task is to develop the materials that describe the guidelines and best practices for PEV infrastructure permitting, installation, deployment, maintenance, and inspection as well as a plan for sharing them with the regions throughout the state.

The Recipient shall:

- Develop a best practices and guidelines document for reference that can be accessed over the internet, in print, and in PowerPoint form. The guidelines will cover PEV infrastructure deployment for residential single- and multi-family dwelling units, workplace, fleets, commercial and public sites, and fast charging units in strategic locations.
- In coordination with the Task 5.2 outreach plan, identify the best strategies for sharing the information in California and the region.

Recipient's Products:

- Manual of guidelines and best practices.

Task 5.2 Develop Outreach and Education Plan

The goal of this task is to develop an outreach and education plan that would accelerate PEV adoption in private and public fleets. The outreach would build on the EV 101 workshops held in Southern California and continue to build public awareness about the benefits of PEVs. This task would also include the development of subregional outreach plans for WRCOG and SBCCOG. SCAQMD funded a series of EV 101 workshops, of which three have been held at UCLA, Carson, and Riverside, and four more EV 101 workshops are to be scheduled for later this year. SoCalPEVCC partners members SCAG, SCAQMD, SCE, EVSE manufacturers, and the Clean Cities Coalitions in Southern California will continue to partner together to hold these workshops.

The Recipient shall:

- Assess the existing level of consumer knowledge regarding the costs and benefits of PEVs and potential strategies to increase public knowledge and awareness.
- Share best practices with other subregions and regions for PEV infrastructure deployment and inspection, installation and permitting guidelines as well as American with Disabilities Act compliance and consistent PEV charger signage in collaboration with the SoCalPEVCC.
- Conduct at least four educational "EV 101" events (for consumers and building inspectors, utilities, facilities public works personnel and auto dealers).
- Prepare and submit a catalogue of suitable educational materials (presentations, brochures, web material).
- Develop and submit a plan for an educational and outreach campaign in Southern California.
- Develop and submit plans to accelerate purchases of PEVs in Southern California, including WRCOG and SBCCOG.

Recipient's Products:

- Final outreach catalogue of suitable educational materials (presentations, brochures, web material, including use of social media).
- Plan to accelerate purchases of PEVs in Southern California.
- Outreach and Education Plan.