

**GRANT REQUEST FORM (GRF)**New Agreement ARV-14-036 (To be completed by CGL Office)

Division	Agreement Manager:	MS-	Phone
600 Fuels and Transportation Division	Sharon Purewal	27	916-654-4637

Recipient's Legal Name	Federal ID Number
San Diego Association of Governments (SANDAG)	95-2784997

Title of Project
San Diego Regional PEV Readiness Plan Implementation

Term and Amount	Start Date	End Date	Amount
	2 / 25 / 2015	1 / 30 / 2018	\$ 300,000

**Business Meeting Information**
 ARFVTP agreements under \$75K delegated to Executive Director.

Proposed Business Meeting Date	2 / 25 / 2015	<input type="checkbox"/> Consent	<input checked="" type="checkbox"/> Discussion
Business Meeting Presenter	Sharon Purewal	Time Needed:	5 minutes

Please select one list serve. Altfuels (AB118- ARFVTP)**Agenda Item Subject and Description**

Proposed resolution approving Agreement ARV-14-036 with the San Diego Association of Governments (SANDAG) for a \$300,000 grant to further regional deployment of plug-in electric vehicles and infrastructure through a combination of resource development, training, technical assistance, and outreach. (ARFVTP Funding). Contact: Sharon Purewal

**California Environmental Quality Act (CEQA) Compliance**

1. Is Agreement considered a "Project" under CEQA?  
 Yes (skip to question 2)  No (complete the following (PRC 21065 and 14 CCR 15378)):  
 Explain why Agreement is not considered a "Project":  
 Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because .
2. If Agreement is considered a "Project" under CEQA:  
 a) Agreement **IS** exempt. (Attach draft NOE)  
 Statutory Exemption. List PRC and/or CCR section number: Public Resources Code -Section 21065  
 Categorical Exemption. List CCR section number: \_\_\_\_\_  
 Common Sense Exemption. 14 CCR 15061 (b) (3)  
 Explain reason why Agreement is exempt under the above section:
- b) Agreement **IS NOT** exempt. (Consult with the legal office to determine next steps.)  
 Check all that apply  
 Initial Study  Environmental Impact Report  
 Negative Declaration  Statement of Overriding Considerations  
 Mitigated Negative Declaration

**List all subcontractors (major and minor) and equipment vendors: (attach additional sheets as necessary)**

Legal Company Name:	Budget
Center for Sustainable Energy	\$ 225,000
	\$ 0
	\$ 0

**List all key partners: (attach additional sheets as necessary)**

Legal Company Name:

**GRANT REQUEST FORM (GRF)**

CEC-270 (Revised 02/13)

CALIFORNIA ENERGY COMMISSION



<b>Budget Information</b>			
<b>Funding Source</b>	<b>Funding Year of Appropriation</b>	<b>Budget List No.</b>	<b>Amount</b>
ARFVTF	13/14	601.118F	\$300,000
Funding Source			\$
R&D Program Area:	N/A	<b>TOTAL:</b>	\$300,000
Explanation for "Other" selection			
Reimbursement Contract #:		Federal Agreement #:	

<b>Recipient's Administrator/ Officer</b>				<b>Recipient's Project Manager</b>			
Name:	Susan Freedman			Name:	Susan Freedman		
Address:	SANDAG 401 B Street, Suite 800			Address:	SANDAG 401 B Street, Suite 800		
City, State, Zip:	San Diego, CA 92101			City, State, Zip:	San Diego, CA 92101		
Phone:	619-699-7387	Fax:	- -	Phone:	619-699-7387	Fax:	- -
E-Mail:	susan.freedman@sandag.org			E-Mail:	susan.freedman@sandag.org		

<b>Selection Process Used</b>			
<input checked="" type="checkbox"/> Competitive Solicitation		Solicitation #: PON-14-603	
<input type="checkbox"/> First Come First Served Solicitation			

<b>The following items should be attached to this GRF</b>			
1. Exhibit A, Scope of Work		<input checked="" type="checkbox"/>	Attached
2. Exhibit B, Budget Detail		<input checked="" type="checkbox"/>	Attached
3. CEC 105, Questionnaire for Identifying Conflicts		<input checked="" type="checkbox"/>	Attached
4. Recipient Resolution		<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached
5. CEQA Documentation		<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Attached

\_\_\_\_\_  
Agreement Manager\_\_\_\_\_  
Date\_\_\_\_\_  
Office Manager\_\_\_\_\_  
Date\_\_\_\_\_  
Deputy Director\_\_\_\_\_  
Date

## Exhibit A SCOPE OF WORK

### TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2		Permitting and Inspection Process
3	X	EVCS Installation Process
4		EVCS Siting
5		PEV Awareness

### KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Susan Freedman - SANDAG, Anna Lowe - SANDAG, Allison Wood - SANDAG, Colin Santulli - CSE, Kevin Wood - CSE	N/A	N/A
2	Susan Freedman - SANDAG, Anna Lowe - SANDAG, Allison Wood - SANDAG, Colin Santulli - CSE, Kevin Wood - CSE	N/A	N/A
3	Susan Freedman - SANDAG, Anna Lowe - SANDAG, Allison Wood - SANDAG, Colin Santulli - CSE, Kevin Wood - CSE	N/A	N/A
4	Susan Freedman - SANDAG, Anna Lowe - SANDAG, Allison Wood - SANDAG, Colin Santulli - CSE, Kevin Wood - CSE	N/A	N/A
5	Susan Freedman - SANDAG, Anna Lowe - SANDAG, Allison Wood - SANDAG, Colin Santulli - CSE, Kevin Wood - CSE	N/A	N/A

## GLOSSARY

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

<b>Term/ Acronym</b>	<b>Definition</b>
ARFVTP	Alternative and Renewable Vehicle and Technology Program
CAM	Commission Agreement Manager
CPR	Critical Project Review
CSE	Center for Sustainable Energy
EVCS	Electric Vehicle Charging Station
FTD	Fuels and Transportation Division
MUD	Multi-Unit Dwelling
PEV	Plug-in Electric Vehicle
Recipient	San Diego Association of Governments
REVI	San Diego Regional Electric Vehicle Infrastructure Working Group
SANDAG	San Diego Association of Governments

## BACKGROUND

Assembly Bill (AB) 118 (Núñez, Chapter 750, Statutes of 2007), created the Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP). The statute 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. AB 8 (Perea, Chapter 401, Statutes of 2013) re-authorizes the ARFVTP through January 1, 2024, and specifies that the Energy Commission allocate up to \$20 million per year (or up to 20 percent of each fiscal year's funds) in funding for hydrogen station development until at least 100 stations are operational.

The ARFVTP has an annual budget of approximately \$100 million and provides financial support for projects that:

- Reduce California's use and dependence on petroleum transportation fuels and increase the use of alternative and renewable fuels and advanced vehicle technologies.
- Produce sustainable alternative and renewable low-carbon fuels in California.
- Expand alternative fueling infrastructure and fueling stations.
- Improve the efficiency, performance and market viability of alternative light-, medium-, and heavy-duty vehicle technologies.
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets to alternative technologies or fuel use.

- Expand the alternative fueling infrastructure available to existing fleets, public transit, and transportation corridors.
- Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

The statute requires the Energy Commission to adopt and update annually an investment plan to determine funding priorities and opportunities and describe how program funding will be used to complement other public and private investments. The Energy Commission adopted its most recent investment plan on April 22, 2014. A link to the 2014-2015 Investment Plan Update for the Alternative and Renewable Fuel and Vehicle Technology Program (CEC-600-2013-003-CMF) can be found at <http://www.energy.ca.gov/2013publications/CEC-600-2013-003/CEC-600-2013-003-CMF.pdf>.

On September 9, 2014, the California Energy Commission (Energy Commission) released a Grant Solicitation and Application Package entitled “Zero Emission Vehicle (ZEV) Readiness” under the ARFVTP. This first-come, first-served grant solicitation was an offer to fund projects that support new and existing planning efforts for plug-in electric vehicles (PEVs) and fuel cell electric vehicles (FCEVs). To be eligible for funding under PON-14-603, the projects must also be consistent with the Energy Commission’s ARFVTP Investment Plan updated annually. In response to PON-14-603, the Recipient submitted application #3 which was proposed for funding in the Energy Commission’s Notice of Proposed Awards on November 17, 2014. PON-14-603 and Recipient’s application are hereby incorporated by reference into this Agreement in their entirety.

In the event of any conflict or inconsistency between the terms of the Solicitation and the terms of the Recipient’s Application, the Solicitation shall control. In the event of any conflict or inconsistency between the Recipient’s Application and the terms of Commission’s Award, the Commission’s Award shall control. Similarly, in the event of any conflict or inconsistency between the terms of this Agreement and the Recipient’s Application, the terms of this Agreement shall control.

**Problem Statement:**

The San Diego Regional Plug-in Electric Vehicle (PEV) Readiness Plan (Readiness Plan), adopted on January 24, 2014, identified a number of barriers to the installation of EVCS and made recommendations on how to address these barriers. However, there has been no coordinated regional effort to implement these recommendations and many municipalities are limited in staff time and technical expertise to address them on their own. As PEV adoption has continued to grow in the region, the ability of municipalities to accommodate PEVs has not expanded as quickly.

The establishment of a regional technical expert to 1) assist local government staff with a variety of EVCS challenges (permitting and inspection, installations, siting, etc.) and 2) train local government staff on best practices and tools (e.g., checklists and correction sheets) available to overcome those challenges is necessary. This regional technical

expert (the “EV Expert”) will have subject matter expertise on EVCS permitting, installation, and siting and will provide technical assistance and training at no cost to local governments. Local government staff will be able to schedule in-person consultations or access the EV Expert remotely via phone and e-mail to address permitting and inspection needs.

The use of checklists and correction sheets coupled with providing municipal staff with access to a subject matter expert has been successful in advancing other clean energy technologies (e.g., energy efficiency, solar photovoltaic, etc.) in the region. This model builds public and private sector institutional knowledge on the nuances associated with the deployment of new technologies, while limiting the burden on end-users (in this case, potential EVCS hosts).

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

The goal of this Agreement is to implement recommendations made by the Readiness Plan, to streamline permitting, improve the EVCS installation process, and assist in siting EVCS, while increasing awareness of EVCS and PEVs in general.

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

The objectives of this Agreement are to:

- Streamline the EVCS permitting and inspection process through training and technical assistance to municipal staff.
- Provide new resources to educate municipal staff, contractors, and end users on the installation process.
- Establish a regional EV expert who can provide direct technical assistance on EVCS deployment in all the above areas. The effectiveness of this approach will be evaluated through surveys of municipal staff by the Recipient, and documented as part of project reporting by the Recipient.
- Increase awareness of PEVs by providing new car dealers with informational materials and through direct workplace promotion of PEVs and EVCS.

## **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 CAM shall designate the date and location of this meeting and provide an agenda to the Recipient prior to the meeting.

**The Recipient shall:**

- Attend a “Kick-Off” meeting with the Commission Agreement 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 Agreement Manager to this meeting.
- Discuss the following administrative and technical aspects of this Agreement:
  - Agreement Terms and Conditions
  - Critical Project Review (Task 1.2)
  - Match fund documentation (Task 1.6) No reimbursable work may be done until this documentation is in place.
  - Permit documentation (Task 1.7)
  - Subcontracts needed to carry out project (Task 1.8)
  - The CAM’s expectations for accomplishing tasks described in the Scope of Work
  - An updated Schedule of Products and Due Dates
  - Monthly Progress Reports (Task 1.4)
  - Technical Products (Product Guidelines located in Section 5 of the Terms and Conditions)
  - Final Report (Task 1.5)

**Recipient Products:**

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

**Commission Agreement Manager Product:**

- Kick-Off Meeting Agenda

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

CPRs provide the opportunity for frank discussions between the Energy Commission and the Recipient. 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.

The Commission Agreement Manager may schedule CPR meetings as necessary, and meeting costs will be borne by the Recipient.

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

**The CAM 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. Prepare 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 CAM 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 CAM 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.

**CAM 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 Agreement 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 Agreement Manager.

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 Agreement Manager will determine the appropriate meeting participants.

The administrative portion of the meeting shall be a discussion with the Commission Agreement 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)
- 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.

**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 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 Agreement 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.

- In the first Monthly Progress Report and first invoice, document and verify match expenditures and provide a synopsis of project progress, if match funds have been expended or if work funded with match share has occurred after the notice of proposed award but before execution of the grant agreement. If no match funds have been expended or if no work funded with match share has occurred before execution, then state this in the report. All pre-execution match expenditures must conform to the requirements in 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 the Agreement's 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, if requested by the CAM.
- Prepare a Final Report following the latest version of the Final Report guidelines which will be provided by the CAM. The CAM 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:**

- Outline of the Final Report, if requested
- 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 Agreement 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 Agreement Manager if during the course of the Agreement additional match funds are received.

- Notify the Commission Agreement 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 meeting.

**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 Agreement 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 Agreement Manager.

- As permits are obtained, send a copy of each approved permit to the Commission Agreement Manager.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the Commission Agreement 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 to ensure quality products and to procure subcontractors required to carry out the tasks under this Agreement consistent with the Agreement Terms and Conditions 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, and that the budgeted expenditures are reasonable and consistent with applicable cost principles.

**The Recipient shall:**

- Manage and coordinate subcontractor activities.
- Submit a draft of each subcontract required to conduct the work under this Agreement to the Commission Agreement Manager for review.
- Submit a final copy of the executed subcontract.
- If Recipient decides to add new subcontractors, then the Recipient shall notify the CAM.

**Products:**

- Draft subcontracts
- Final subcontracts

**TECHNICAL TASKS**

**TASK 2 PERMITTING AND INSPECTION PROCESS**

The goal of this task is to provide local governments guidance on improving the permitting and inspection process to ensure contractors who will install and operate EVCS and end users of EVCS can receive timely and accurate approvals for EVCS installations. A regional subject matter expert, the “EV Expert,” will assist stakeholders with EVCS permitting and inspection processes, including training local government staff on the use of permitting and inspection tools and best practices (described in Task 5).

**Task 2.1 Permitting and Inspection Resource Development**

The goal of this subtask is to utilize a permitting best practice measure (the permitting correction list) and apply it to EVCS scenarios. Permitting correction lists have been effective in reducing permitting delays for other equipment that require local permits. The permitting correction lists will be based on best practices established by REVI as well as successful permitting and/or inspection processes and state resources developed subsequent to REVI. Standardized resources will be developed for jurisdictions as well as standardized permitting and inspection best practice language to post on their websites.

**The Recipient shall:**

- Gather information on existing permitting and inspection processes and identify examples of success from local cities.
- Use the relevant local resources from REVI, guidance from the State of California, and examples from other local governments to develop a report on the latest best practices available.
- Seek input from the region’s Alternative Fuel Coordinating Council and other stakeholders on common permitting and inspection issues that have delayed EVCS installations. Create permitting and inspection correction lists for a variety of typical EVCS installation scenarios (MUD, public access, etc.) for use by local government permitting and inspection staff and contractors.
- Develop EVCS permitting and inspection standardized language for use on local government websites.

**Products:**

- Report on regional permitting and inspection best practices and recommendations identified in readiness plans
- EVCS Permitting and Inspection Correction Sheets for a variety of typical installation scenarios (MUD, public access, etc.)
- Standard text and resources for use by jurisdictions on municipal websites

**Task 2.2 EVCS Permitting and Inspection Sub-Regional Workshops**

The goal of this subtask is to hold workshops in geographically diverse sub-regions of San Diego County for local government staff. These workshops will address how EVCS fit into existing permitting and inspections processes and provide a forum for peer discussions on approaches to local EVCS permitting and inspection processes. The workshops will serve as venues to distribute the best practice materials and correction lists developed in Task 2.1.. The workshops also will be used to promote the technical assistance available from the “EV Expert” (described in Task 5).

**The Recipient shall:**

- Conduct up to four (4) workshops throughout the San Diego region for local government staff on the updated best practices and use of permitting and inspection correction lists.

- Promote the availability of technical assistance available through this project (i.e., the EV Expert described in Task 5).

**Products:**

- Workshop agendas and summaries

**TASK 3 INSTALLATION PROCESS**

The goal of this task is to provide education, best practice tools, and technical assistance for local government staff, contractors, and other stakeholders to better understand the process for installing EVCS in their jurisdictions and increase their deployment, especially at workplaces, on public sites, and at MUDs.

**Task 3.1 Development and Distribution of EVCS Installation Guidance**

The goal of this subtask is to provide guidance to municipal staff and contractors on the EVCS installation process and on the use of to-be-developed installation checklists. The task will include leveraging stakeholder relationships established through REVI to discuss typical installation barriers (including those identified in the Readiness Plan) and develop EVCS installation checklists for a variety of typical installation scenarios (MUD, public access, etc.) for use by municipal staff, contractors and other PEV stakeholders.

**The Recipient shall:**

- Gather information on common installation barriers and challenges.
- Review the recommendations established through REVI and include all that are still current and relevant in EVCS best practices for this project.
- Develop EVCS installation checklists outlining requirements for a variety of typical installation scenarios.
- Distribute checklists to municipal staff, contractors and other PEV stakeholders.
- Integrate training on checklists into other meetings/workshops associated with this project (see Tasks 2.1 and 4.1) when appropriate.

**Products:**

- Report on regional EVCS installation best practices
- EVCS Installation Checklists for a variety of typical installation scenarios (MUD, public access, etc.)
- 

**[CPR WILL BE HELD IN THIS TASK. See Task 1.2 for details]**

**TASK 4 EVCS SITING**

The goal of this task is to expand EVCS installations at MUDs by promoting the technical assistance available through this project to potential MUD EVCS hosts.

**Task 4.1 Promotion of EV Expert Technical Assistance and Resources for EVCS**

## **Siting at MUDs**

The goal of this task is to engage and inform PEV stakeholders on MUD-specific resources produced through Tasks 2.1 and 3.1, and to encourage potential MUD EVCS hosts to utilize the technical assistance on the EVCS siting process available from the EV Expert (Task 5).

### **The Recipient shall:**

- Create a presentation describing technical assistance available on MUD siting through the EV Expert (Task 5).
- Promote the availability of the EV Expert's MUD siting technical assistance (see Task 5) at various regularly scheduled meetings and events including:
  - SANDAG Regional Energy Working Group
  - San Diego Regional Clean Cities Coalition
  - San Diego Regional Alternative Fuel Coordinating Council
  - San Diego Regional Chamber of Commerce
  - San Diego Chapter – California Apartment Association
  - San Diego Chapter – Urban Land Institute
- Use the Plug-In Electric Vehicles: Charging at Condos, Apartments, and Community Living Areas, a factsheet developed through the REVI as well as other resources available on MUD EVCS siting, to assist potential MUD hosts during EV Expert consultations (see Task 5).

### **Products:**

- PowerPoint presentation resources and technical assistance available for MUD EVCS siting
- List of meetings and/or events attended to promote available MUD siting assistance

## **TASK 5 TECHNICAL ASSISTANCE FROM EV EXPERT**

The goal of this task is to provide direct technical assistance on EVCS permitting and inspection, installation, and siting to local government staff, contractors, potential EVCS hosts, and other stakeholders through a regional EV Expert.

### **Task 5.1 Remote and In-Person EV Expert Consultations**

The goal of this subtask is to provide EV Expert technical assistance through remote and in-person consultations, particularly for local government staff.

### **The Recipient shall:**

- Promote the availability and technical assistance of the EV Expert through direct communications with local governments (including the workshops described in Tasks 2.1 and 4.1).
- Provide at least 30 in-person EV Expert consultations on EVCS permitting and inspection, installation, and/or siting with local government staff, contractors, and/or potential EVCS hosts.

- Offer recommendations during consultations based on the resources developed in Tasks 2.1 and 3.1, and currently available resources on MUD EVCS installations.
- Provide remote access to the EV Expert via email and phone (during published hours) and respond to inquiries within one business day.
- Develop a list of frequently asked questions (FAQs) and make available at meetings and online.

**Products:**

- Monthly report of all EV Expert consultations including:
  - Name, affiliation, and description of EV Expert consultation
  - Call log and email tracking sheet of remote consultations
- Summary report of FAQs on EVCS permitting and inspection, installation, and siting

**Task 5.2 Survey of EV Expert Effectiveness**

The goal of this subtask is to conduct a survey to evaluate the effectiveness of the EV Expert in providing technical assistance that addresses barriers faced with regard to EVCS permitting and inspection processes, installation, and siting.

**The Recipient shall:**

- Survey all who accessed technical assistance from the EV Expert through this project to evaluate project effectiveness.
- Prepare a report summarizing the findings of the survey including recommendations for future technical assistance.

**Products:**

- Survey questions
- Summary report on survey findings and recommendations for future technical assistance

**TASK 6 PEV AWARENESS**

The goal of this task is to expand PEV awareness in the region through PEV dealership and employer channels. Outreach will include information on PEV features, benefits of the vehicles, available incentives, utility rates, and regional planning in support of EVCS.

**Task 6.1 Dealership Education and Outreach**

The goal of this subtask is educate dealers on PEV programs through the use of updated informational material(s) and individual visits. SANDAG, CSE, SDG&E and the San Diego Regional Clean Cities Coalition previously developed an informational brochure which covered PEV benefits, incentives, utility rates, and regional planning for electric vehicles. The Recipient shall create an updated, redesigned brochure, or similar product, to assist dealers in providing information to consumers.

**The Recipient shall:**

- Leverage feedback from previous efforts to create an updated, redesigned brochure, or similar product, highlighting PEV benefits and resources.
- Distribute brochure, or similar product, to dealers through individual visits and coordination with San Diego County New Car Dealers Association.

**Products:**

- Updated and redesigned dealership PEV educational material(s)
- Summary report including number physical brochures distributed, metrics on web resources highlighted in materials and recommendations for future outreach efforts to dealerships.

**Task 6.2 Workplace Seminars**

The goal of this subtask is to provide education on PEVs to consumers through workplace seminars and to facilitate an increase in employers adopting PEV-friendly policies, including installation of EVSE.

**The Recipient shall:**

- Leverage SANDAG iCommute program to access multiple target employers in the region.
- Present on PEV basics, incentives, and guidance on charging at up to 18 workplaces.
- Encourage employers to adopt PEV-friendly policies, including installation of EVSE.

**Products:**

- PEV 101 presentation developed for workplaces
- Seminar agenda and summaries
- Summary report of workplace seminars including number of presentations given, total attendance, attendee feedback and recommendations for future outreach efforts in this area

STATE OF CALIFORNIA

STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: SAN DIEGO ASSOCIATION OF GOVERNMENTS (SANDAG)

**RESOLVED**, that the State Energy Resources Conservation and Development Commission (Energy Commission) adopts the staff CEQA findings contained in the Agreement Request Form; and

**RESOLVED**, that the Energy Commission approves Agreement ARV-14-036 with the San Diego Association of Governments (SANDAG) for a \$300,000 grant to further regional deployment of plug-in electric vehicles and infrastructure through a combination of resource development, training, technical assistance, and outreach; and

**FURTHER BE IT RESOLVED**, that the Executive Director or his/her designee shall 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 25, 2015.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

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Harriet Kallemeyn,  
Secretariat