

GRANT REQUEST FORM (GRF)

CEC-270 (Revised 02/13)

CALIFORNIA ENERGY COMMISSION

New Agreement ARV-14-060 (To be completed by CGL Office)

Division	Agreement Manager:	MS-	Phone
600 Fuels and Transportation Division	Lindsee Tanimoto	27	916-654-4566

Recipient's Legal Name	Federal ID Number
City of Oakland	94-6000384

Title of Project
Catalyzing PEV Readiness in the Bay Area's Transit Hub: Code Enhancement and Community Infrastructure.

Term and Amount	Start Date	End Date	Amount
	6 / 30 / 2015	6 / 30 / 2017	\$ 170,324

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

Proposed Business Meeting Date	6 / 10 / 2015	<input type="checkbox"/> Consent	<input checked="" type="checkbox"/> Discussion
Business Meeting Presenter	TBD (Lindsee Tanimoto?)	Time Needed:	5 minutes

Please select one list serve. Altfuels (AB118- ARFVTP)

Agenda Item Subject and Description

Proposed resolution approving Agreement ARV-14-060 with the City of Oakland for a \$170,324 grant to provide education and training, assessment and recommendations for permitting and inspection best practices to streamline future implementation of the Bay Area Plug-in Electric Vehicle Readiness Plan for the cities of Oakland and Tiburon. (ARFVTP funding) Contact: Lindsee Tanimoto. (Staff presentation: 5 minutes)

California Environmental Quality Act (CEQA) Compliance

- 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 this Plan involves permitting, inspections, and siting.
 - If Agreement is considered a "Project" under CEQA:
 - a) Agreement **IS** exempt. (Attach draft NOE)
 - Statutory Exemption. List PRC and/or CCR section number:
 - Categorical Exemption. List CCR 14 CCR 15306 Information Collection section number:
 - Common Sense Exemption. 14 CCR 15061 (b) (3)
 - Explain reason why Agreement is exempt under the above section:
 - The project consists solely of education, training, planning, assessment, coordination, and outreach activities.
 - b) Agreement **IS NOT** exempt. (Consult with the legal office to determine next steps.)
- Check all that apply
- | | |
|---|---|
| <input type="checkbox"/> Initial Study | <input type="checkbox"/> Environmental Impact Report |
| <input type="checkbox"/> Negative Declaration | <input type="checkbox"/> Statement of Overriding Considerations |
| <input type="checkbox"/> Mitigated Negative Declaration | |

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

Legal Company Name:	Budget
Energy Solutions	\$ 152,619
	\$
	\$

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

Legal Company Name:
City and County of San Francisco
Town of Tiburon

GRANT REQUEST FORM (GRF)

Budget Information			
Funding Source	Funding Year of Appropriation	Budget List No.	Amount
ARFVTF	13/14	601.118F	\$170,324
Funding Source			\$
R&D Program Area:	Select Program Area	TOTAL:	\$ 0
Explanation for "Other" selection			
Reimbursement Contract #:		Federal Agreement #:	

Recipient's Administrator/ Officer				Recipient's Project Manager			
Name:	Becky Dowdakin			Name:	Shayna Hirshfield-Gold		
Address:	250 Frank Ogawa Plaza, Suite 5301			Address:	250 Frank Ogawa Plaza, Suite 5301		
City, State, Zip:	Oakland, CA, 94612			City, State, Zip:	Oakland, CA, 94612		
Phone:	510-238-6981	Fax:	510-238-7286	Phone:	510-238-6954	Fax:	510-238-7286
E-Mail:	bdowdakin@oaklandnet.com			E-Mail:	shirshfield-gold@oaklandnet.com		

Selection Process Used	
<input checked="" type="checkbox"/> Competitive Solicitation	Solicitation #: PON-14-607
<input type="checkbox"/> First Come First Served Solicitation	

The following items should be attached to this GRF	
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 checked="" type="checkbox"/> N/A <input 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	X	Local Government Code Adoption and Training
3		Permitting and Inspection Process, Streamlining, and Outreach
4		Data Collection and Analysis

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Shayna Hirshfield-Gold, City of Oakland Ed Pike, Energy Solutions	Energy Solutions	City and County of San Francisco, Town of Tiburon
2	Shayna Hirshfield-Gold, Darin Ranelletti, City of Oakland Ed Pike, Energy Solutions	Energy Solutions	City and County of San Francisco, Town of Tiburon
3	Darin Ranelletti, City of Oakland Ed Pike, Energy Solutions	Energy Solutions	Town of Tiburon
4	Shayna Hirshfield-Gold, Darin Ranelletti City of Oakland Ed Pike, Energy Solutions	Energy Solutions	City and County of San Francisco, Town of Tiburon

GLOSSARY

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

Term/ Acronym	Definition
ARFVTP	Alternative and Renewable Vehicle and Technology Program
CAM	Commission Agreement Manager
CPR	Critical Project Review
Energy Commission	California Energy Commission
EVCS	Electric Vehicle Charging Station
FTD	Fuels and Transportation Division
PEV	Plug-in Electric Vehicle
Recipient	City of Oakland

Term/ Acronym	Definition
SF	City and county of San Francisco
ZEV	Zero Emission Vehicle

Background

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

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

The Energy Commission issued solicitation PON-14-607 to fund Zero Emission Vehicle (ZEV) Readiness activities. To be eligible for funding under PON-14-607, the projects must also be consistent with the Energy Commission’s ARFVT Investment Plan updated annually. In response to PON-14-607, the City of Oakland (Recipient) submitted application number 4, which was proposed for funding in the Energy Commission’s Notice of Proposed Awards on March 17, 2015, and is incorporated by reference to this Agreement in its 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 the Energy Commission’s Award, the Energy 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:

In order to meet California's ZEV goals of 1.5 million vehicles by 2025, local jurisdictions need to implement more aggressive PEV readiness plans and policies to ensure that the supply of Plug-in Electric Vehicle (PEV) infrastructure both satisfies and encourages the growing demand for PEVs. As the transportation hub of the San Francisco Bay Area; the City of Oakland and City and County of San Francisco (SF) have important PEV needs with significant institutional and market barriers. Even California's new mandatory CALGreen PEV readiness code, which

specifies that 2 to 3% of parking spaces must be PEV-ready, is insufficient to meet expected local PEV demand and California's goals for 1.5 million ZEVs. Adopting the CALGreen PEV Readiness Voluntary Code increases the specification to 4 to 6% of parking spaces at a nominal incremental cost. The Town of Tiburon, California represents an example how a smaller community can facilitate PEV readiness through codes.

However, the process for adopting voluntary codes requires robust cost-effectiveness analysis, approval by local jurisdiction governing boards, and approval from state oversight agencies. Local jurisdiction staff does not have the resources to support completion of this process. In addition, permitting and inspection processes in Oakland and Tiburon have not been optimized for electric vehicle charging station (EVCS). The combination of more stringent PEV readiness codes and efficient permitting and inspection processes can better prepare local jurisdictions for increased PEV demand and ensure that major Bay Area transportation corridors are designed to support pervasive PEV uptake.

Goals of the Agreement:

The goals of this Agreement are to: (1) support the adoption of the CALGreen Voluntary Standards in Oakland, SF, and Tiburon along with education and training; and (2) assess, recommend, and implement permitting and inspection best practices for Oakland and Tiburon.

Objectives of the Agreement:

The objectives of this Agreement are to:

- Double the number of PEV-ready parking spaces required for all new construction in Oakland, SF, and Tiburon. This will be deemed successful if all three jurisdictions adopt the CALGreen Voluntary Standards, which would double the number of PEV-ready parking spaces for new construction. Local jurisdiction adoption of CALGreen will also set a precedent for potential future statewide adoption.
- Reduce confusion and time required to permit and inspect PEV infrastructure projects in Oakland and Tiburon. This objective will be deemed successful if: 1) PEV infrastructure permit applications are integrated with related applications, 2) Oakland and Tiburon planning and inspections staff understand requirements and best practices, and 3) informational materials are readily available for the developer communities.

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 Commission Agreement Manager (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 CAM, 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 CAM 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

CAM 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 CAM 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 and submit 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 and submit 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 CAM. 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 CAM.
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 CAM will determine the appropriate meeting participants.
The administrative portion of the meeting shall be a discussion with the CAM 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 and submit 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 and submit 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 CAM 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 and submit an Outline of the Final Report.
- Prepare and submit 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
- 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 and submit a letter documenting the match funding committed to this Agreement and submit it to the CAM 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 CAM if during the course of the Agreement additional match funds are received.
- Notify the CAM 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.

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 and submit a letter documenting the permits required to conduct this Agreement and submit it to the CAM 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 CAM.
- As permits are obtained, send a copy of each approved permit to the CAM.

- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM 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)
- A copy of each final approved permit (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 CAM 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:

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

TECHNICAL TASKS

Task 2: LOCAL GOVERNMENT CODE ADOPTION TRAINING

The mandatory PEV readiness code, effective mid-2015, excludes small-sized and many medium-sized multi-family properties and workplaces that are common among in-fill development for Oakland and San Francisco, and among new development in Tiburon. The mandatory code specifies that about 3% of parking spaces must be PEV-ready, which will be an insufficient number of parking spaces to meet expected local PEV demand as documented in the Bay Area PEV Readiness' Plan. The tasks associated with this activity will provide education and training to facilitate the adoption of local codes that include all or part of the CALGreen Voluntary Code, and therefore meet the projected demand for PEV readiness in the affected local jurisdictions.

Task 2.1 Model Local Benefits and Support Adoption of CALGreen PEV Readiness Reach Codes

The goal of this task is to provide technical expertise and education to support Local Government Code adoption, as recommended in the Bay Area PEV Readiness Plan (Section 3.2), in the Cities of Oakland and Tiburon, as well as, SF. The Recipient will help decision makers understand and interpret the assumptions used and outputs from the PEV infrastructure cost model and share concerns and solutions experienced during the Voluntary Code development process. Furthermore, the CALGreen Voluntary Code exempts multifamily properties with fewer than 17 units, which is a significant portion of multi-family properties in Oakland, SF, and Tiburon.

The Recipient shall:

- Estimate the number of additional PEV-ready spaces and cost savings that will occur due to local adoption of the CALGreen Voluntary Code in Oakland, SF, and Tiburon using the CALGreen PEV Infrastructure Cost Model.
- Educate local policy makers on benefits and costs of implementing Tier 1 or Tier 2 of the CALGreen PEV Readiness Voluntary Code and potential modifications such as narrowing or eliminating the applicability gap for multi-family dwellings of between two and 17 units (which applies to both the Mandatory and Voluntary Codes).
- Develop a staff report for each local jurisdiction's governing body documenting the benefits and costs of implementing Tier 1 and Tier 2 of the CALGreen PEV Readiness Voluntary Code.

Products:

- CALGreen PEV Readiness Voluntary Codes outreach presentation
- PEV Infrastructure Cost-Effectiveness Report for Oakland, SF, and Tiburon
- PEV Code Proposed Adoption Staff Report for the Cities of Oakland and Tiburon and SF
- Written comments for proposed local adoption of Voluntary Code

Task 2.2 Administer Training to Planners, Permitting Staff, Inspectors, and Builders

The goal of this task is to educate planners, permitting staff, inspectors and builders about the parameters of the Voluntary Code using a mixture of in-person trainings and web and print media.

The Recipient shall:

- Develop training materials focusing on interpreting the CALGreen PEV Readiness Voluntary Codes, materials, and infrastructure requirements (electrical conduit, electric panel, and plans), implications for Level 1 and Level 2 charging systems, and respond to case-specific questions. The training materials will be coordinated with the training materials provided by the California Department of Housing and Community Development, including the presentation, fact sheets for local jurisdiction staff and builders, and frequently asked questions.

- Facilitate two (2) trainings for planners, permitting staff, inspectors, and builders. Among the three municipalities, approximately 200 planners and inspectors need education and training on how to interpret and comply with PEV readiness codes. The trainings will be offered in-person along with a web broadcast that will be recorded for staff who cannot attend in person.
- Provide training for the public, especially the building and PEV communities.

Products:

- Downloadable PEV Readiness Codes implementation presentation and webinar
- Applicability and Requirements Fact Sheet for residential and nonresidential buildings
- Examples of required PEV infrastructure plans and potential code-compliant configurations
- Training Log of local jurisdiction staff and public stakeholders

[CPR WILL OCCUR DURING THIS TASK. SEE TASK 1.2 FOR DETAILS.]

Task 3.0 PERMITTING AND INSPECTION PROCESS, STREAMLINING, AND OUTREACH

PEV permitting and inspections are relatively new for local jurisdiction staff, the builder and developer community, and community residents. Because information and materials on new codes, application requirements, and EVCS types are not readily understood or available, the cost of local jurisdiction staff and builders time to understand and complete the process for EVCS permitting are increased. As a result, many residents and builders may be discouraged from applying for permits, and the local jurisdictions have no way of ensuring proper and safe installations. The tasks associated with this activity will make the permitting and inspection processes easier for residents, developers and/or builders to comply and develop streamlined processes that enable local staff to expedite the process.

Task 3.1 Conduct Process Evaluation of City Permitting and Inspection Process

The goal of this task is to assess current EVCS permitting and inspection processes and identify opportunities to streamline PEV infrastructure permitting and inspections, as recommended in the Bay Area PEV Readiness Plan (Section 3.3), in Oakland and Tiburon.

The Recipient shall:

- Benchmark all critical aspects of the permitting and inspection process for Level 1 and Level 2 EVCS and DC Fast Charging, including:
 - Assess the availability of on-line information and services such as application forms, instructions, model applications, process diagrams, and the number of "clicks" required to locate all materials.
 - Analyze average permit application costs and turn-around time, as well as over-the counter permit availability. This analysis will include evaluating the alignment of applicant submission and inspection fees with costs to Oakland and Tiburon.
 - Assess the type and rigor of permit processing training. This activity will examine the trainings offered, the target audience, how often trainings are offered, and how well trainings have been attended. It will look closely at how the trainings cover the nuances and technical details of Level 1, Level 2 and DC Fast Charging.
- Identify how the best practices from the Bay Area PEV Readiness Plan section 3.3 are being implemented including:

- Expediting permitting for EVCS in single-family residences.
- Creating a permitting checklist for EVCS permit applicants, and post guidance online.
- Requiring load calculations for Level 2 EVCS, and working with local utilities to create a notification protocol for new EVCS through the permitting process.
- Training permitting and inspection officials in basic EVCS installation.
- Ensuring that permitting staff are knowledgeable about EVCS installation.
- Understand applicant level of satisfaction and suggestions for improvement by contacting past applicants such as EVCS providers, developers, builders, and residents and asking about their experience with the process.
- Obtain staff suggestions for improvement through interviews with permitting and inspections staff. Recipient will pay close attention to redundant and/or out-of-date processes, whether permits require review by mechanical and structural staff (not just electrical), and any inconsistencies between how local jurisdiction staff execute permit review and inspections.

Products:

- Draft Memorandum summarizing the evaluation findings
- Final Memorandum summarizing the evaluation findings

Task 3.2 Develop Process Enhancement Recommendations

The goal of this task is to develop a permitting and inspection process that is well understood by the building community, is easy for local jurisdiction staff to implement, and reduces the overall time and cost to permit and inspect EVCS infrastructure projects.

The Recipient shall:

- Develop recommendations and guidelines for training and potential process improvements based on the Task 3.1 Process Evaluation. These improvements may include additional training and outreach, permit prioritization, permit inspection procedures, implementation of best practices and/or permit fee standardization.

Products:

- Draft Process Enhancements Recommendations Memorandum
- Final Process Enhancements Recommendations Memorandum

Task 3.3 Support Implementation of Streamlined Processes and Materials

The goal of this task is to modify existing permitting materials and where necessary develop new materials to communicate the process and facilitate the rollout of the enhanced permitting and inspection processes based on the information gained during the needs assessment.

The Recipient shall:

- Develop a permitting and inspection process flow diagram. The diagram will display the stakeholders involved in the process (applicant, permit reviewer, inspector, builder, utility, etc.), the activity flow that should be followed, and the expected timing from a submitted application to approved inspection. The recipient will modify or create forms, instructions and related materials, as necessary based on the needs identified under Task 3.2 to enhance the application, permitting and inspection process for PEV infrastructure and facilitate

- its rollout, including: inspection checklists, a modified application form, and an example application to show applicants what a completed application entails.
- Develop webpage providing information and resources. The webpage will be easily accessible and searchable and have all of the materials clearly and definitively labeled.
- Provide training to local jurisdiction staff, developers, builders, PEV infrastructure developers, and other interested parties. The training will cover the overall process, technical details required for Level 1, Level 2 and DC Fast Charging, and best practices for how to ensure your application is processed expediently.

Products:

- Guidance Document for interpreting national, state and local codes related to EVCS permitting
- EVCS Installation Inspection Checklist
- Webpage with informational resources for EVCS permitting and inspections
- Permit and Inspection Process Enhancement Presentation and final training resources to agency staff and builders
- Training Log of local jurisdiction staff and stakeholders

Task 4: Data Collection and Analysis

The goal of this task is to collect project data, analyze it for economic and environmental impacts, and to include the data and analysis in the Final Report.

The Recipient will:

- Develop a data collection plan and troubleshoot any issues identified.
- Collect data on the number of Oakland. planning, permitting and inspection staff trained on the CALGreen voluntary codes and the number of builders and member of the public trained, as well as:
 - How many permits are issued under the improved process.
 - Estimated time savings from permitting process improvements.
- Estimate the number of PEV-ready parking spaces and EVCS that are expected to result from the project by California's 2025 ZEV adoption target date, the number of PEVs that will be supported, and the environmental benefits such as:
 - Gallons of gasoline and/or diesel fuel displaced (with estimated associated mileage information)
 - Expected air emissions (non-methane hydrocarbons, oxides of nitrogen, non-methane hydrocarbons plus oxides of nitrogen, particulate matter, and formaldehyde) reduction displaced gasoline/diesel emission vehicle mileage
- Identify and analyze the sources of electricity, including renewable energy content and carbon intensity that will be used to support additional PEVs.
- Estimate the expected cost savings from installing additional PEV-ready parking spaces due to new code requirements relative to what would have been installed absent new reach codes and streamlined permitting.
- Compare any project performance and expectations provided in the proposal to Energy Commission with actual project performance and accomplishments.

- Document lessons learned and best practices from enhanced PEV code development, permit streamlining, and staff training, in a format that will be beneficial to other Bay Area and California-wide local governments seeking enhanced PEV infrastructure policies and outreach.

Product:

- Final Report

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: CITY OF OAKLAND

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-14-060 from PON-14-607 with the **City of Oakland** for a **\$170,324** grant to provide education and training, assessment and recommendations for permitting and inspection best practices to streamline future implementation of the Bay Area Plug-in Electric Vehicle Readiness Plan for the cities of Oakland and Tiburon; 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 June 10, 2015.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

Harriet Kallemeyn,
Secretariat