**GRANT FUNDING OPPORTUNITY**

**Clean Transportation Program**

**Responsive, Easy Charging Products**

**With Dynamic Signals (REDWDS)**



**Addendum 3**

GFO-22-609

[Solicitation Information](http://www.energy.ca.gov/contracts/index.html)

https://www.energy.ca.gov/funding-opportunities/solicitations

State of California

California Energy Commission

**July 2023**

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# I. Introduction

## Purpose of Solicitation

This is a competitive grant solicitation. The California Energy Commission’s (CEC’s) Clean Transportation Program announces the availability of up to $9 million in grant funds to accelerate the development and deployment of easy-to-use charging products which help customers manage electric vehicle (EV) charging and respond to dynamic grid signals. Up to $300 million in additional grant funds may be available in the future to complete a second phase of work for agreements initially awarded funding under this solicitation.

This solicitation builds upon the Open Charge Point Protocol (OCPP) and International Standard for Organization (ISO) 15118 technical requirements included in CEC’s block grant projects[[1]](#footnote-2), as well as recent revisions to the Load Management Standards.[[2]](#footnote-3)

## Background

The Budget Act of 2021 (Assembly Bill (AB) 128, Ting, Chapter 21, Statutes of 2021, as amended by Senate Bill (SB) 129, Skinner, Chapter 69, Statutes of 2021 and SB 170, Skinner, Chapter 240, Statutes of 2021) appropriated $785,000,000 from the General Fund to support infrastructure deployments and manufacturing projects for zero-emission light-duty and medium- and heavy-duty vehicles.

AB 211 (Committee on Budget, Chapter 574, Statutes of 2022), provides $54 million to support "emerging opportunities.” This includes funding for “vehicle-grid integration efforts,” among other activities.

This solicitation utilizes the processes established under the Clean Transportation Program. AB 118 (Nuñez, Chapter 750, Statutes of 2007), created the Clean Transportation Program. The statute authorizes the CEC 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-authorized the Clean Transportation Program through January 1, 2024, and specified that the CEC 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 Clean Transportation Program 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.

## Commitment to Diversity

The CEC is committed to ensuring that participation in its Clean Transportation Program reflects the rich and diverse characteristics of California and its people. To meet this commitment, CEC staff conducts outreach efforts and activities to:

* Ensure potential new applicants throughout the state are aware of CEC’s Clean Transportation Program and the funding opportunities the program provides.
* Encourage greater participation by underrepresented groups including disabled veteran-, women-, minority-, and LGBT-owned businesses.
* Assist applicants in understanding how to apply for funding from CEC’s Clean Transportation Program.

## Key Activities and Dates

Key activities including dates and times for this solicitation are presented below. An addendum will be released if the dates change for the asterisked (\*) activities. Times listed are Pacific Standard Time or Pacific Daylight Time, whichever is being observed.

|  |  |
| --- | --- |
| **ACTIVITY** | **ACTION DATE** |
| Solicitation Release | March 10, 2023 |
| Pre-Application Workshop\* | March 23, 2023 |
| Deadline for Written Questions\* | March 29, 2023 |
| Anticipated Distribution of Questions/Answers | Week of April 24, 2023 |
| Deadline to Submit Applications by 11:59 p.m.\* | Friday June 2, 2023 |
| Anticipated Notice of Proposed Awards Posting | **Week of September 25, 2023** [~~July 2023~~] |
| Anticipated CEC Business Meeting | **December 2023** [~~October 2023~~] and later |
| Phase 1 Project Completion Deadline | March 31, 2026 |
| Phase 2 (optional) Project Completion Deadline | March 31, 2029 |

## How Award is Determined

Applicants passing administrative and technical screening will compete based on evaluation criteria and will be scored and ranked based on those criteria. Unless CEC exercises any of its other rights regarding this solicitation (for example, to cancel the solicitation or reduce funding), applications obtaining at least the minimum passing score will be recommended for funding in ranked order until all funds currently available under this solicitation, or which may be available in the future, are exhausted. Awards may then be made up to specified amounts, with funding for Phase 1 of awarded projects guaranteed and funding for Phase 2 contingent both on availability of funds and completion of specified performance metrics, as determined by the CEC. Funding for Phase 2 will be distributed to those projects which proposed a Phase 2 and meet specified performance metrics on a first-come, first-served basis (See Section I.F below, and Special Terms and Conditions).

If the funds available under this solicitation are insufficient to fully fund a grant proposal, CEC reserves the right to recommend partially funding that proposal. In this event, the proposed Applicant/Awardee and Commission Agreement Manager (CAM) shall meet and attempt to reach agreement on a reduced scope of work commensurate with the level of available funding.

## Solicitation Phases

To enable rapid scale up for successful projects, this solicitation is designed to accommodate up to two project phases. Phase 1 is required for all projects and would fund product development, customer deployment, and data reporting. Phase 2 is optional and would include additional funding to support additional customer deployments and data reporting. Projects may only proceed to Phase 2 if they meet certain performance metrics during Phase 1 (see Section II.B.4) as determined by the CEC. Funding for Phase 2 will be distributed to those projects which proposed a Phase 2 and meet specified performance metrics on a first-come, first-served basis. Funding for Phase 2 is also subject to future appropriations and is not guaranteed.

## Availability of Funds

A total of up to $309 million may be available for awards under this solicitation. Of that amount, up to $9 million **is available** to fund Phase 1 project activities, and up to $300 million **may be available** to fund Phase 2 project activities. CEC **may** fund Phase 2 project activities for each awarded project on a first-come, first-served basis if CEC determines that specified performance metrics have been met. Projects may only access funding for Phase 2 if they meet certain performance metrics during Phase 1 (see Section II.B.4). Also, funding for Phase 2 is subject to future appropriations and is not guaranteed. CEC, at its sole discretion, reserves the right to increase or decrease the amount of funds available under this solicitation.

## Minimum and Maximum Award Amounts

Phase 1 is required for all projects and Phase 2 is optional. For Phase 1, Applicants are eligible to request between $350,000 and $2.5 million in CEC funding and must commit at least 25 percent of the total eligible project cost as match funding. For the optional Phase 2, Applicants are eligible to request between $350,000 and $50 million and must commit at least 50 percent of the total eligible project cost as match funding.

## Maximum Number of Applications

Applicants are only eligible to submit one application. There is no limit on the number of applications in which an entity is included as a subcontractor (that is, not the applicant). If all applications in which an entity appears as either the applicant or a subcontractor are awarded, the entity must be able to complete all work.

## Pre-Application Workshop

There will be one Pre-Application Workshop; participation in this meeting is optional but encouraged. The Pre-Application Workshop will be held remotely through Zoom and telephone at the date, time and location listed below. Please call the Commission Agreement Officer (CAO) listed in Section I.M or refer to the CEC’s solicitations [website](https://www.energy.ca.gov/funding-opportunities/solicitations) at https://www.energy.ca.gov/funding-opportunities/solicitations to confirm the date and time.

**10 a.m. – 12 p.m., Thursday, March 23, 2023**

Remote participation only (Zoom or telephone)

## Participation Through Zoom

Zoom is the CEC’s online meeting service. When attending remotely, presentations will appear on your device screen, and audio may be heard via the device or telephone. Please be aware that the Zoom meeting will be recorded.

**Zoom Instructions:**

[Join this workshop](https://energy.zoom.us/j/86575586457?pwd=NHpkTEEzNnJSWGx5TXNmNkZ5WHpVZz09) remotely at https://energy.zoom.us/j/86575586457?pwd=NHpkTEEzNnJSWGx5TXNmNkZ5WHpVZz09. You may also access the workshop by going to the [Zoom webpage](https://join.zoom.us) at https://join.zoom.us and entering the unique meeting ID and password below:

**Webinar ID:** 865 7558 6457

**Webinar Password:** 239193

**Telephone Access Only:**

Call (888) 853-5257 or (888) 475-4499 (toll-free). When prompted, enter the unique meeting ID number above. To comment over the telephone, dial \*9 to “raise your hand” and \*6 to mute/unmute your phone line.

**Access by Mobile Device:**

Download the application from the Zoom Download Center, <https://energy.zoom.us/download>

**Technical Support:**

For assistance with problems or questions about joining or attending the meeting, please call Zoom technical support at (888) 799-9666 ext. 2, or you may contact the CEC’s Public Advisor’s Office at [publicadvisor@energy.ca.gov](mailto:publicadvisor@energy.ca.gov), or (800) 822-6228. To determine whether your computer is compatible with Zoom, visit:

[https://support.zoom.us/hc/en-us/articles/201362023-System-requirements-for-Windows-macOS-and-Linux.](https://support.zoom.us/hc/en-us/articles/201362023-System-requirements-for-Windows-macOS-and-Linux. )

## Questions

Applicants may ask questions at the Pre-Application Workshop, and may submit written questions via e-mail to the CAO listed in Section I.M. However, all technical questions must be received by the deadline listed in the “Key Activities and Dates” table above. Questions received after the deadline may be answered at the CEC’s discretion. Non-technical questions (such as questions concerning application format requirements or attachment instructions) may be submitted to the CAO at any time prior to 5:00 p.m. of the application deadline date.

The question and answer will be posted on the [CEC’s solicitation information website](file:///C:/Users/sarens/Downloads/CEC’s%20solicitation%20information%20website) at https://www.energy.ca.gov/funding-opportunities/solicitations.

Any verbal communication with a CEC employee concerning this solicitation is not binding on the State and shall in no way alter a specification, term, or condition of the solicitation. All communication must be directed in writing to the CAO assigned to the solicitation.

## Contact Information

Angela Hockaday, Commission Agreement Officer

California Energy Commission, 715 P Street, MS-1, Sacramento, California 95814

[Angela.Hockaday@energy.ca.gov](mailto:Angela.Hockaday@energy.ca.gov)

## Reference Documents

Applicants may benefit from familiarizing themselves with the following:

* [2022-2023 Investment Plan Update for the Clean Transportation Program](https://www.energy.ca.gov/publications/2022/2022-2023-investment-plan-update-clean-transportation-program) (CEC-600-2021-038) https://www.energy.ca.gov/publications/2022/2022-2023-investment-plan-update-clean-transportation-program.
* [Assembly Bill 211 (2022) Public Resources Trailer Bill](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB211)  
  https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=202120220AB211
* [Vehicle Grid Integration](https://www.energy.ca.gov/programs-and-topics/programs/vehicle-grid-integration)  
  https://www.energy.ca.gov/programs-and-topics/programs/vehicle-grid-integration
* [California Climate Investments Priority Populations Map](https://webmaps.arb.ca.gov/PriorityPopulations/) https://webmaps.arb.ca.gov/PriorityPopulations/
* [Assembly Bill 841 (2020)](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201920200AB841)   
  https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=201920200AB841
* [Energy Commission Agreement Management System (ECAMS)](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources
* [Grant Recipient and Contractor Past Performance Evaluation](https://www.energy.ca.gov/sites/default/files/2022-01/Contractor_Past_Performance_Evaluation_FTD_ADA.pdf) https://www.energy.ca.gov/sites/default/files/2022-01/Contractor\_Past\_Performance\_Evaluation\_FTD\_ADA.pdf

# II. Eligibility Requirements

## Applicant Requirements

1. **Eligibility**

This solicitation is open to:

* + - Electric vehicle service providers (EVSPs) and charging network companies
    - Electric vehicle supply equipment (EVSE) manufacturers
    - Electric vehicle charging software and/or hardware providers
    - Automation service providers that manage or aggregate[[3]](#footnote-4) charging
    - Vehicle manufacturers

The Applicant must be from one of the above categories. Key partners may be included on the project team, such as community-based organizations, local governments, cities, municipalities, transit agencies, contractors, and others. There are no limitations on the types of entities which may be included as key partners on the project team. Key partners may be particularly useful for supporting the customer deployment portion of the project.

1. **Terms and Conditions**

Each grant agreement resulting from this solicitation will include terms and conditions, as well as special terms and conditions, that set forth the grant recipient’s rights and responsibilities. By providing the authorizations and certifications required under this solicitation, each Applicant agrees to enter into an agreement, if awarded, with the CEC to conduct the proposed project according to the terms and conditions that correspond to its organization, without negotiation: (1) University of California and California State University terms and conditions; (2) U.S. Department of Energy terms and conditions; or (3) standard terms and conditions. The standard terms and conditions are located at [CEC's funding resources website](http://www.energy.ca.gov/research/contractors.html) at https://www.energy.ca.gov/funding-opportunities/funding-resources.

Failure to agree to the terms and conditions and special terms and conditions by taking actions such as failing to provide the required authorizations and certifications or indicating that acceptance is based on modification of the terms may result in rejection of the application. Applicants must read the terms and conditions and special terms and conditions carefully. CEC reserves the right to modify the terms and conditions and special terms and conditions prior to executing grant agreements.

1. **California Secretary of State Registration**

All corporations, limited liability companies (LLCs), limited partnerships (LPs) and limited liability partnerships (LLPs) that conduct intrastate business in California are required to be registered and in good standing with the California Secretary of State prior to its project being recommended for approval at a CEC Business Meeting. If not currently registered with the California Secretary of State, Applicants are encouraged to contact the Secretary of State’s Office as soon as possible to avoid potential delays in beginning the proposed project(s) (should the application be proposed for funding). For more information, contact the Secretary of State’s Office via [the Secretary of State’s Office website](http://www.sos.ca.gov/) at www.sos.ca.gov. Sole proprietors using a fictitious business name must be registered with the appropriate county and provide evidence of registration to CEC prior to their project being recommended for approval at a CEC Business Meeting.

1. **Requirements for Collection of Confidential or Personal  
   Information**

Proposed awardees whose projects involve the collection of confidential or personal information will be required to adhere to special terms and conditions for confidential and personal information (see Attachment 11); attest to having an information security program plan in place (see Attachment 12); and sign a nondisclosure agreement (see Attachment 13), prior to the grant agreement being approved at a CEC Business Meeting. Projects with deployments at residences, including single family homes, are likely subject to these additional requirements.

1. **Executive Order N-6-22 – Russia Sanctions**

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. “Economic Sanctions” refers to sanctions imposed by the U.S. government in response to Russia’s actions in Ukraine, as well as any sanctions imposed under state law. By submitting a bid or proposal, Applicant represents that it is not a target of Economic Sanctions. Should the State determine Applicant/Recipient is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of the Applicant’s bid/proposal any time prior to contract execution, or, if determined after contract execution, shall be grounds for termination by the State.

## Project Requirements

This solicitation is designed to support the development and deployment of charging products which help customers easily manage charging in response to dynamic grid signals. This solicitation builds upon the OCPP and ISO 15118 technical requirements included in CEC’s block grant projects, as well as the recent update to the Load Management Standards.

A wide range of products may fall under this description including but not limited to charging network software, vehicle software, unidirectional EVSE, bidirectional EVSE, aggregator products, and so on. Regardless of the product type, all projects must meet or exceed the requirements described in this section. Products exceeding the minimum requirements may be scored more favorably (see evaluation criteria in Section IV.E).

To support rapid scale up of successful projects, **this solicitation is designed to accommodate two phases:** Phase 1 and Phase 2. Phase 1 is required for all projects and includes product development to improve response to dynamic grid signals, some preliminary customer deployment of the product, and data reporting on product usage. Projects with Phase 1 customer deployments that, as determined by CEC, meet specified performance metrics (see Section II.B.4 below) are eligible to continue to an optional Phase 2, subject to funding availability, which may include added funding for additional customer deployments and data reporting. Applicants interested in potentially pursuing Phase 2 must describe Phase 2 activities in their application and specify how much funding they will require for each phase.

1. **Phase 1 product development:** Required for all projects. Products developed as part of this project must, at minimum:

|  |  |
| --- | --- |
| 1-1 | Be capable of automatically retrieving grid signals. At minimum, products:   1. Must be capable of retrieving electricity rates and Flex Alerts from the CEC’s Market Informed Demand Automation Server (MIDAS[[4]](#footnote-5)). 2. Must be capable of receiving Emergency Load Reduction Program (ELRP[[5]](#footnote-6)) and Demand Side Grid Support Program[[6]](#footnote-7) event notifications. 3. May *optionally* integrate with other application programming interfaces (APIs) needed to retrieve grid signals and execute transactive energy tenders, such as TeMix’s API for the Southern California Edison (SCE) Dynamic Rates Pilot.[[7]](#footnote-8) |
| 1-2 | Be capable of optimizing vehicle charging in response to the dynamic signals described in 1-1 above and customer needs and preferences. Products must be capable of scheduling or otherwise managing charging in response to grid signals while ensuring that driver needs, including requested energy/range and departure time, are met. This may involve the use of artificial intelligence and machine learning. (Given ISO 15118 Ready requirements in CEC’s block grant projects,[[8]](#footnote-9) EVSE products should be capable of using ISO 15118 to retrieve energy and departure time requests from compatible vehicles). |
| 1-3 | Include one or more customer interfaces to support all of the following:   * Collect inputs such as the customer’s Rate Identification Number and charging preferences. * Explain how charging will be optimized. * Explain how responding to grid signals will create value for the customer. Customer value is broadly defined and could mean a tally of electricity bill savings, an attractively priced subscription for the customer’s charging needs (such as a flat monthly rate for unlimited charging), other reward points and gamification, and so on. * Notify the customer of additional savings opportunities such as grid emergency events. |
| 1-4 | Support interoperability. At minimum:   * Charging station management system products must be compliant with OCPP and certified by the Open Charge Alliance.[[9]](#footnote-10) Products must support network migration without the need for additional fees, tools, or site visits. * EVSE products must be compliant with OCPP and certified by the Open Charge Alliance. Products must support network migration without the need for additional fees, tools, or site visits.  *(EVSE products should also be capable of using ISO 15118 to automatically retrieve energy and departure time requests from compatible vehicles. Projects will be evaluated on the degree to which they include implementation of ISO 15118; see Section IV.E Evaluation Criterion 7. EVSE products not implementing ISO 15118 are still eligible.)* * Aggregation systems using vehicle telematics must be interoperable with multiple vehicle manufacturers. * For products not listed in the above categories, the Applicant must describe how the product supports interoperability. |

1. **Phase 1 customer deployments**: Required for all projects. Following product development, projects must deploy the product to customers in California. Customer deployments must meet the following minimum requirements:

|  |  |
| --- | --- |
| 2-1 | Customer deployments must accumulate 100 or more deployment credits. Each customer deployment receives a certain number of deployment credits depending on the installation type. Applicants shall calculate deployment credits as follows (CEC may verify deployment credit calculations):   * For charging station management system products, one new or existing EVSE connected to the product equals one credit. * For automation service provider or aggregator products, one EV or EVSE connected to the product equals one credit. * For charging hardware products, one new EVSE or other charging hardware unit (minimum 3.3 kilowatts charge power) installed equals one credit.   **Exceptions apply:**   * A deployment installing one new bidirectional EVSE equals 2.5 credits. * A deployment installing one new higher-power EVSE or charging hardware unit (greater than 22 kilowatts) equals 1 credit for every 4.5 kilowatts of charge power capacity whether unidirectional or bidirectional, up to a maximum of 12.5 credits. Higher-power EVSE used for public fast charging is not eligible under this provision. Public fast charging is defined as one or more EVSE (or other charging hardware) open to the general public and primarily serving customers with short dwell times. * Only one of the above exceptions may apply to a deployment. For example, a deployment installing one new 30 kW bidirectional EVSE may count as either 2.5 credits (as a bidirectional EVSE) or 30/4.5 = 6.67 credits (as a higher-power EVSE). * A deployment installing bidirectional EVSE serving one or more school buses will earn 0 deployment credits.[[10]](#footnote-11)   Each deployment shall only count as one deployment type. Example 1: Some companies produce both charging station management systems and chargers. If such a company installs one new 9 kilowatt charger at a site and connects the charger to their charging station management system, that deployment accrues 1 credit (either as one EVSE connected to their charging station management system or one new EVSE).  For products which communicate with both the vehicle and EVSE (or other charging hardware product), the number of EVSE (or other charging hardware products) deployed shall be used for deployment credit calculations. Example 2: A charging product connects to both vehicle telematics systems and EVSE. The project deploys the product at a fleet lot by connecting the product to the site’s 10 existing EVSE and 17 existing fleet vehicles. This counts as 10 deployment credits.  Example 3:A project deploying a charging station management system could meet the 100 credit minimum by connecting 80 existing EVSE and installing 8 new bidirectional EVSE (totaling 80 + 8\*2.5 = 100 credits with 88 deployments). |
| 2-2 | Deployments must span at least three electric customer accounts at unique service addresses. For example, a deployment of 100 EVSE to a single fleet operator at one address does **not** fulfill this requirement. All deployments must be in California. |
| 2-3 | At least 50 percent of deployments must be in a disadvantaged, [~~or~~] low-income, or both disadvantaged and low-income community based on the [California Climate Investments Priority Populations 2022 CES 4.0 map](https://webmaps.arb.ca.gov/PriorityPopulations/). |
| 2-4 | At least 35 percent of deployments must be with customers who enroll in a dynamic or transactive energy rate.[[11]](#footnote-12) All remaining deployments must be with customers enrolled in a time varying rate, such as a time of use rate. |
| 2-5 | Any EVSE funded through this solicitation must be:   * Safety certified by a Nationally Recognized Testing Laboratory prior to deployment at a customer site.[[12]](#footnote-13) * Compliant with OCPP and certified by the Open Charge Alliance (EVSE models with documentation of pending OCPP certification are eligible). |
| 2-6 | AB 841 (Ting, Chapter 372, Statutes of 2020)[[13]](#footnote-14) requires all electric vehicle charging infrastructure and equipment located on the customer side of the electrical meter funded in whole or in part by the CEC to be installed by a contractor with the appropriate license classification, as determined by the Contractors’ State License Board, and that at least one electrician on each crew, at any given time, must hold an Electric Vehicle Infrastructure Training Program (EVITP) certification. For projects that include installation of a charging port supplying 25 kW or more to a vehicle, at least 25 percent of the total electricians working on the crew for the project, at any given time, must hold EVITP certification. One member of each crew may be both the contractor and an EVITP certified electrician. These requirements do not apply to any of the following:   1. Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility. 2. Electric vehicle charging infrastructure funded by moneys derived from credits generated from the Low Carbon Fuel Standard Program. 3. Single-family home residential electric vehicle chargers that can use an existing 208/240-volt outlet. |
| 2-7 | All deployments must be at existing structures or facilities and involve negligible or no expansion of existing or former use. Acceptable deployments may include installations at existing single-family homes, existing parking lots at multi-family homes, existing fleet vehicle lots, and similar site types.  **Note:** The likelihood that CEC can complete a timely CEQA review (see Section III.D.9) may be increased if the project limits deployments to a single site type with deployment details known in advance (for example, all customer deployments will be new chargers installed at existing residences, or all customer deployments will be using existing chargers at existing fleet lots). |

1. **Phase 1 data collection and reporting:** Required for all projects. The project must collect data for at least 12 months on all funded deployments. Minimum data collection and reporting requirements are described below:

|  |  |
| --- | --- |
| 3-1 | Sub-hourly Charging Data:  For all deployments, record charging power in kilowatts (kW), connector status, and real-time electricity price (in $/kWh) at 15-minute intervals or more frequently. For deployments with bidirectional charging, charging power values must indicate when the vehicle is charging (positive) or discharging (negative). Connector status should indicate, at a minimum: connected and charging, connected and not charging, and not connected. Sub-hourly charging data shall be made available upon CEC request **and does not need to be regularly reported** otherwise. |
| 3-2 | Monthly Median Normalized 24-Hour Charging Power and Price Profile (hereinafter “normalized profile”):  Calculate, record, and plot two normalized profiles for each month: One for all deployments with customers enrolled on dynamic rates, and one for all other deployments.  To normalize a particular deployment’s charging power profile, scale the peak charge power to a dimensionless 1 and retain 0 kW at 0. To normalize a particular deployment’s electricity price profile, scale the peak electricity price to a dimensionless 1 and retain $0/kWh at 0.  For all normalized profiles, the y-axis shall show normalized charging power (that is, power delivered from the grid to the vehicle) and electricity price ranging from zero to one. (Bidirectional charging or negative electricity prices may require shifting the axis downward to accommodate negative values; adjust as appropriate.) The x-axis shall show a single 24-hour period ranging 0 to 24. An example plot is shown below.  Follow the below order of operations to calculate the normalized profiles:   1. For each deployment with a customer on a dynamic rate, calculate the median 24-hour charging power and electricity price profiles for the entire month using data from 3-1 (sub-hourly charging data). For this step, the y-axis of the plots should show real values in kW and $/kWh. 2. Normalize the profiles calculated in the prior step by scaling the monthly peak charge power and peak electricity price to a dimensionless 1. 3. Using the profiles calculated in the prior step (one for each customer on a dynamic rate), calculate the median normalized 24-hour charging power and electricity price profiles across all dynamic rate customers. Record, plot, and report this profile to CEC each month during the monthly project call. 4. Repeat the above steps for the remaining deployments (with customers not enrolled on a dynamic rate).   An example normalized charging profile is shown below:  An example normalized charging profile   * This data reporting requirement will yield **two normalized profiles per month** (one for dynamic rate customers, one for all remaining customers), totaling at least 24 normalized charging profiles during the project term. Normalized profiles shall be reported to CEC during monthly project updates. |
| 3-3 | Average Electricity Price By Month:  For all deployments, calculate the average price ($/kWh) of electricity used for charging that month. Any fixed monthly infrastructure charges, adders, or other fees *not* billed on a volumetric basis (by kWh) shall be noted but excluded from this reporting value. Calculating this value may require using data from 3-1 above.   * This data reporting requirement will yield one $/kWh value per month for each deployment and shall be reported to CEC during monthly project updates in an aggregated spreadsheet. |
| 3-4 | Otherwise-Applicable Average Electricity Price By Month:  For all deployments with a customer enrolled on a dynamic rate, calculate the average price ($/kWh) of electricity for charging that would have been realized that month on an otherwise-applicable electricity rate. Projects shall select an otherwise-applicable electricity rate that can be reasonably viewed as the default time of use rate for a similar customer in the same utility territory. The goal of this reporting requirement is to determine whether customers are realizing additional savings on their dynamic rate. This data collection requirement **does not apply to deployments with customers enrolled on non-dynamic rates.**   * This data reporting requirement will yield one $/kWh value per month for each dynamic rate deployment and shall be reported to CEC during monthly project updates in the aggregated spreadsheet. |
| 3-5 | Customer Deployment Log:  Record the below information for each deployment as the product is deployed to individual customers. Maintain a single spreadsheet for all customer deployments and add to the spreadsheet as the product is deployed to additional customers. A product is considered “deployed” with a customer if it is installed, active, and collecting data. A CEC template is available, and grant recipients may use their own reporting template if preferred.   1. Date of deployment 2. Address of deployment 3. Site type (single-family home, multi-family home, restaurant, and so on) 4. Whether site is in a disadvantaged or low-income community (or both) based on the [California Climate Investments Priority Populations 2022 CES 4.0 map](https://webmaps.arb.ca.gov/PriorityPopulations/). 5. Electric utility provider and enrolled electricity rate 6. Whether the enrolled electricity rate is a dynamic rate 7. Whether the deployment is enrolled in the SCE Dynamic Rates pilot 8. Deployment type (for example, new EVSE, existing EVSE, vehicle telematics connection, and so on) 9. Associated manufacturer and model number of the deployment 10. Number of deployments at the site/address 11. If deploying new EVSE, record:     1. Number of EVSE installed at deployment site     2. Connector type(s)     3. Nameplate charging power (for bidirectional EVSE, also note nameplate discharge power)     4. EVITP Certification Number(s)  *Items e-i may not apply depending on the funding source used. CEC will provide clarification during agreement development.*     5. Total cost     6. Total subsidy from the CEC     7. Total federal subsidy     8. Total utility subsidy     9. Total privately funded share of cost  * The Customer Deployment Log shall be regularly maintained and reported to CEC during monthly project updates. |
| 3-6 | Other Legislatively Required Data Reporting, including but not limited to:  EVSE installed using certain legislatively appropriated funds are subject to additional reporting requirements outlined below at the end of the 12-month data collection and reporting period. Depending on the funding sources used for projects resulting from this solicitation, this data reporting requirement may not apply; CEC will provide clarification during agreement development. This data reporting requirement only applies to deployments installing new EVSE.   1. Number of charging sessions 2. Average session duration 3. Average kWh dispensed (per session) 4. Total kWh dispensed 5. Average EVSE downtime  * This data reporting requirement shall be reported to CEC at the end of the project in the aggregated spreadsheet. |
| 3-7 | Other Applicable Recordkeeping and Reporting:  In addition to the other requirements set forth in this application manual and the law, electric vehicle chargers and charging stations installed on or after January 1, 2024, must comply with recordkeeping and reporting standards which CEC is currently in the process of developing. As background, [AB 2061](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fleginfo.legislature.ca.gov%2Ffaces%2FbillNavClient.xhtml%3Fbill_id%3D202120220AB2061&data=05%7C01%7C%7C290110607f12413bab9a08daf02f8dcf%7Cac3a124413f44ef68d1bbaa27148194e%7C0%7C0%7C638086384288850727%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=P9oDswEBi%2FyX24LfBJ4oBcgip9GoHKIcgeFPFE6c63Q%3D&reserved=0) and Cal. Pub. Resources Code sect. 25231.5 require the CEC, in consultation with the CPUC, to develop recordkeeping and reporting standards for EV chargers and charging stations. CEC is working to develop regulations in compliance with AB 2061. Other requirements, including but not limited to uptime and operation and maintenance requirements, may also be adopted by regulation. Once these regulations are finalized, chargers which are installed on or after January 1, 2024, including chargers installed under agreements resulting from this solicitation, will need to comply with the new regulations. Applicants to this solicitation must be prepared to comply with any new or updated regulations, even if the regulations are not in existence at the time of application to this solicitation. Under AB 2061, uptime recordkeeping and reporting standards shall not apply to charging stations installed at residential real property containing four or fewer dwelling units. |

1. **Phase 2 eligibility:** Applies to projects proposing Phase 2 activities. If data reporting from Phase 1 customer deployments meets all four performance metrics below, as determined by the CEC, then the project is eligible to proceed to Phase 2. Projects not meeting all four criteria below are not eligible for Phase 2 funding. **Phase 2 is optional,** and this section is not applicable to projects that do not propose Phase 2 activities in their application. Projects interested in pursuing a Phase 2 must describe Phase 2 activities as part of their application, as well as provide separate Budget Forms for Phase 1 and Phase 2. **Phase 2 is subject to future appropriations and is not guaranteed. If available, Phase 2 funding will be awarded to those projects which CEC determines are eligible on a first-come, first-served basis.**

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| 4-1 | Grant recipient has completed at least 7 months of data collection and reporting for at least 75 percent of the originally planned Phase 1 deployments with customers on dynamic rates. |
| 4-2 | Phase 1 data reporting indicates one (or more) of the following:   1. Dynamic rate bill savings: For at least 6 of the most recent 7 months, at least 75 percent of the installed customers on dynamic rates are reporting lower average electricity prices ($/kWh) for their charging on their dynamic rate than they would be reporting under the otherwise applicable (non-dynamic) default rate. 2. Off peak integration: For at least 75 percent of the installed customers on dynamic rates, less than 5 percent of charging energy is consumed between 4 p.m. to 9 p.m. and at least 20 percent of charging energy is consumed between 7 a.m. to 3 p.m. for at least 6 of the most recent 7 months (this latter window is expanded to 3 a.m. to 3 p.m. for June through October).  Deployments integrated with onsite renewable generation may exclude any charging energy supplied entirely by onsite renewable generation from the hour of consumption requirements specified in section 3.II.b above. It is incumbent on the grant recipient to provide evidence indicating that charging energy is supplied entirely by onsite renewable generation (e.g., photos, site wiring diagrams, inverter data, site controller data, and/or sub-hourly charging data). The CAM, in their sole discretion, will determine whether charging energy is supplied entirely by onsite renewable generation such that that energy may be excluded from the hour of consumption requirements. 3. Bidirectional charging:Grant recipient has completed at least 7 months of data collection and reporting for at least 75 percent of the originally planned bidirectional charging customer deployments. For at least 75 percent of these deployments, the customer has exported power from the vehicle (islanded or grid-interactive load reductions) on at least 10 separate instances for at least 30 minutes per instance. At least 4 of these instances must have occurred in response to a grid emergency event signal (these include Emergency Load Reduction Program events, Demand Side Grid Support Program events, CAISO Energy Emergency Alerts, critical peak pricing events if the customer’s rate uses critical peak pricing, and any hour when the customer’s electricity rate exceeds $1/kWh). |
| 4-3 | Match funding is being spent at a pace commensurate with reimbursable funding. |
| 4-4 | As determined by the CAM, there are no project concerns including but not limited to lack of responsiveness from the grant recipient and/or project team, reductions to the scope of work, inability to complete the scope of work within the agreement term, and inconsistent or incorrect data reporting. |

Once the grant recipient believes their project meets the above criteria for Phase 2 eligibility, the grant recipient shall request to their CAM that they begin the Phase 2 amendment process. The CAM will review appropriate documentation and data reporting to confirm the project’s Phase 2 eligibility. The CAM will separately confirm that CEC funding is available (funding for Phase 2 is first-come, first-served and is subject to future appropriations). If the CAM confirms both that the project is eligible for Phase 2 and that funding is available, the CAM will work with the grant recipient to amend the project budget to incorporate expenses for Phase 2 activities.

1. **Phase 2 customer deployments:** Applies to projects proposing Phase 2 activities. Phase 2 requires a higher percentage of deployments to be with customers who enroll in a dynamic or transactive energy rate. Customer deployments in Phase 2 must meet the below requirements:

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| 5-1 | At least 50 percent of deployments must be in a disadvantaged, [~~or~~] low-income, or both disadvantaged and low-income community based on the [California Climate Investments Priority Populations 2022 CES 4.0 map](https://webmaps.arb.ca.gov/PriorityPopulations/). |
| 5-2 | At least **50 percent** of deployments must be with customers who enroll in a dynamic or transactive energy rate. All remaining deployments must be with customers enrolled in a time varying rate, such as a time of use rate. |
| 5-3 | Any EVSE funded through this solicitation must be:   * Safety certified by a Nationally Recognized Testing Laboratory prior to deployment at a customer site. * Compliant with OCPP and certified by the Open Charge Alliance. |
| 5-4 | All deployments conform with AB 841 requirements. See Requirement 2-6. |
| 5-5 | All deployments must be at existing structures or facilities and involve negligible or no expansion of existing or former use. Acceptable deployments may include installations at existing single-family homes, existing parking lots at multi-family homes, existing fleet vehicle lots, and similar site types.  **Note:** The likelihood that CEC can complete a timely CEQA review (see Section III.D.9) may be increased if the project limits deployments to a single site type with deployment details known in advance (for example, all customer deployments will be new chargers installed at existing residences, or all customer deployments will be using existing chargers at existing fleet lots). |

1. **Phase 2 data collection and reporting:** Applies to projects proposing Phase 2 activities. The project must collect data for at least 12 months on all funded deployments, including Phase 2 deployments. Minimum data collection and reporting requirements for Phase 2 are identical to those used in Phase 1; refer to Requirements 3-1 through 3-7.

Finally, the project must include a Final Report that summarizes and evaluates key outcomes from the project. Task 1.6 described in the Scope of Work template contains additional details on Final Report requirements. The Final Report shall cover all applicable project phases. That is, projects with only Phase 1 shall submit a report covering Phase 1, and projects with both Phases 1 and 2 shall submit a report at the end of Phase 2 covering both Phases 1 and 2.

## Eligible Project Costs

The following costs are eligible for CEC reimbursement or as match share:

* Labor, materials, equipment, and other resources to administer the grant
* Labor, materials, equipment, and other resources to support product development, including but not limited to:
  + Software and hardware engineering, including software stacks
  + Product testing and interoperability testing
* Labor, materials, equipment, and other resources supporting customer deployment, including but not limited to:
  + Customer education, outreach, and enrollment costs
  + Customer site preparation, planning, and installation costs
  + EVSE (must meet requirements described in Section II-B above)
* Labor, materials, equipment, and other resources supporting customer site electrical installation, including but not limited to electric panels, external submeters, islanding devices, wiring, conduit, energy management controllers, site controllers, transformer costs borne by the customer, and utility-side electrical upgrade costs borne by the customer.

## Match Funding Requirements

1. **Total Match Share Requirement**

Applications must include a minimum 25 percent total match share for Phase 1, and a minimum 50 percent total match share for Phase 2. Applicants shall submit separate budget forms for Phase 1 and Phase 2; see Section III.D.5 for details.

“Match funding” or “match share” means cash or in-kind (non-cash) contributions provided by the Applicant/Recipient, subcontractors, or other parties that will be used in performance of the proposed project.Match share percentage is calculated by dividing the total match share contributions by the total allowable project cost. *“*Total allowable project cost” is the sum of the CEC’s reimbursable share and Recipient’s match share of the project costs. Match share expenditures have the following requirements:

1. At a minimum, total match share must conform to the “Cash Match Share Requirement” contained in this solicitation.
2. All match share expenditures must conform to the terms and conditions of this solicitation and the resulting grant agreement (see Attachments 9a and 9b).
3. Applicants must disclose the source and provide verification and documentation for the match share funding committed to the project. (For any match share committed by a third party (i.e., other than match share committed by the Applicant), Applicants are encouraged to submit a letter from each match share partner identifying the source(s) and availability of match funding.)
4. During the term of the agreement, grant recipients will be required to document and verify all match share expenditures through invoices submitted to CEC.
5. Match share funding may be in the form of cash or in-kind contributions such as donated labor hours, equipment, facilities, and other property.
6. Equipment, facilities, and property may count as match funds as long as the value of the contribution is based on documented market values or book values, prorated for its use in the project, and depreciated or amortized over the term of the project using generally accepted accounting principles (GAAP).
7. Match share expenditures (cash and/or in-kind) must be documented, reasonable, allowable, and allocable to the project as determined by CEC.
8. Match share expenditures are allowable under an agreement only if they are incurred after CEC notifies the Applicant that its project has been proposed for an award through the release of a Notice of Proposed Awards (NOPA). Match expenditures incurred after the release of the NOPA but prior to the execution of an agreement are made at the Applicant’s own risk. CEC is not liable for Applicant’s match share costs if the grant is not approved, if approval is delayed, or if the match share expenditure is not allowable under the terms and conditions of the grant agreement or this solicitation. Please note that non-match expenditures incurred prior to agreement execution are not reimbursable from CEC funds.
9. **Cash Match Share Requirement**

Applications must include a minimum 50 percent ***cash*** match share for each project phase.

For example, an Applicant proposes a project with $1,000,000 in total Phase 1 project costs and $2,000,000 in total Phase 2 project costs. The Applicant requests $750,000 in CEC funding for Phase 1 (75 percent of the Phase 1 cost) and $1,000,000 in CEC funding for Phase 2 (50 percent of the Phase 2 cost). This project will need to dedicate at least $125,000 in cash match share contributions for Phase 1 and $500,000 in cash match share contributions for Phase 2.

Cash match means the net of any funds actually expended by the Applicant for the project. Net means after any sort of discount or rebate is applied. Expenditures for Applicant’s compensated labor hours, including allowable fringe benefit and overhead rates, travel, materials, supplies, equipment, subrecipient costs, and other miscellaneous expenditures may be claimed as cash match if the expenditures are included in the approved agreement budget, paid in full with funding sources other than grant funds, and supported with appropriate documentation, including proof of payment. For indirect overhead, backup documentation, such as a cost allocation plan based on actual expenditures incurred and paid, is required. Cost allocations must be reasonable and allocable to the proposed project.

1. **In-Kind Match Share**

The balance of the total match share requirement beyond the cash match share requirement (if any) may be met through in-kind match share contributions.

In-kind match share contributions are: 1) non-cash contributions provided by the Applicant; 2) cash or non-cash contributions provided by a subrecipient; and 3) cash or non-cash contributions provided by other third parties. Applicant in-kind match share can be in the form of volunteer labor, real property, existing equipment, existing supplies, services provided by a third-party or subcontract, and other expendable property. The value of in-kind match is based on the fair market value of the goods and services provided at the time it is claimed as match. In-kind match share must be included in the approved agreement budget and supported with appropriate documentation. Cost allocations must be reasonable and allocable to the proposed project.

1. **Match Share Restrictions**
2. ***Other Sources of CEC Funding and Federal Corridor Funding*** – Other sources of CEC funding or federal corridor funding, including but not limited to funding from the Charging and Fueling Infrastructure Corridor Program, California’s National Electric Vehicle Infrastructure Formula Program**,** CALeVIP, EnergIIZE, and similar block grants, may not be claimed as match share.
3. ***Property Not Owned by the Applicant*** – Donated property may be claimed as match based on the fair market value of renting or leasing the property. Fair market value is based on rental costs of comparable property (if any), market conditions in the area, alternatives available and the type, life expectancy, condition, and value of the property.
4. ***Existing Property Owned by the Grant Recipient*** – Applicants may use the property’s depreciation expense as a method to allocate the value of the property to the project. Valuation will need to be documented to support the initial acquisition costs as well as the method of depreciation.
5. ***Valuation of Land*** –Land cannot be depreciated. If the value of land is claimed as match, the Applicant must provide documentation to support a fair market value for the use of the land (i.e., rent or lease cost) for the time period it is used. Appraised value of land cannot be used since this represents the full value of the land if it is sold which includes value beyond the term of the proposed project.
6. ***Property Owned by a Related Party*** –Related parties are individuals or other entities that are able to control or substantially influence the actions of the Applicant and includes spouses, board members, family members of principals or employees of the Applicant as well as property owned by principals/employees of the Applicant. Because agreements between related parties are “less than arms-length” transactions, Applicants must disclose to CEC the relationship and be able to support the fair market value of property that is claimed as match.

If CEC funds are used to reimburse lease/rental payments for property owned by a related party, the Applicant can only claim the ***lesser*** of fair market value or actual lease payments, regardless of lease agreement terms.

1. ***Prorated Value of Property*** – The allowable claimed value of property must be prorated based on the percentage the property is used for the proposed project. For example, if only half of a building is being used for the proposed project, then only 50% of the monthly fair market value of the entire building can be claimed as match while the building is being used for the project.
2. ***Documentation*** – If selected for an award, all claimed match share expenditures must be adequately documented to CEC during the agreement invoicing process which may include but is not limited to: the fair market value of existing property, methodology to allocate existing property on a prorated basis, lease agreements, and other appropriate documentation.

## Unallowable Costs (Reimbursable or Match Share)

For an item of cost to be allowable for reimbursement with CEC funds or as match share expenditure, it must be included in the executed agreement budget and allowable per the terms and conditions of the resulting agreement. The following are examples of unallowable costs under an agreement resulting from this solicitation. This list is not comprehensive and additional items of cost may be unallowable in accordance with the terms and conditions.

1. ***Forgone Profit*** – For example, if a company usually charges 10% profit but only charges 4% to CEC the unclaimed difference is not an allowable item of cost.
2. ***Forgone Rent*** – For example, rent that is not paid is not an allowable item of reimbursable cost.
3. ***Discounted or Refunded Equipment or Software Costs*** – For example, a claim that equipment costs $10,000 but the grant recipient only pays $6,000 due to some “special” discount. The difference of $4,000 is not an allowable match share expense. Another example is if the grant recipient actually pays $10,000 but the vendor refunds $4,000 – only the net $6,000 is an allowable item of cost.
4. ***Foregone Salary, Fringe, Indirect or Other Types of Cost*** – For example, a person normally charges or is paid $100 per hour, but will only charge $50 per hour towards the CEC award. Only actual costs incurred and paid to the employee are allowable. Therefore, if an employee is ***actually*** paid $100 per hour and CEC only reimburses at $40 per hour, then the unreimbursed $60 per hour is an allowable match share cost because this is an actual payment as opposed to a foregone salary amount. Volunteer labor (i.e., labor from a person who does not receive any compensation for their labor) may be an allowable in-kind match share expense if the value of the labor is reasonable and justified.
5. ***Utility-provided electrical upgrades and funding*** – For example, expenses that are already or to be paid for through a utility program, tariff, or other ratepayer funding. This includes ratepayer or Low Carbon Fuel Standard funded incentives.
6. ***Vehicles***– For example, funding may not be used to purchase, lease, or rent vehicles**.**

# III. Application Format, Required Documents, and Delivery

## Required Format for an Application

This section contains the format requirements and instructions on how to submit an application. The format is prescribed to assist the Applicant in meeting State requirements and to enable CEC to evaluate each application uniformly and fairly. Applicants must follow all application format instructions, answer all questions, and supply all requested information.

All applications submitted under this solicitation must be typed or printed using a standard 11-point font, single-spaced and a blank line between paragraphs. Pages must be numbered and sections titled.

## Method For Delivery

The method of delivery for this solicitation is the [CEC’s Grant Solicitation System](https://gss.energy.ca.gov/) (GSS), available at https://gss.energy.ca.gov/. This online tool allows Applicants to submit their electronic documents to CEC prior to the date and time specified in this solicitation. Electronic files must be in Microsoft Word (.doc format) and Excel Office Suite formats unless originally provided in the solicitation in another format. Completed Budget Forms, using Attachment 4, must be in Excel format.

The deadline to submit grant applications through the CEC’s GSS is **11:59 p.m**. on the application due date. The GSS system automatically closes at 11:59 pm. If the full submittal process has not been completed before 11:59 p.m., your application will not be considered. NO EXCEPTIONS will be entertained.

The CEC strongly encourages Applicants to upload and submit all applications by 5:00 p.m. because CEC staff will not be available after 5:00 p.m. or on weekends to assist with the upload process. And please note that while we endeavor to assist all would-be applicants, we can’t guarantee staff will be available for in-person consultation on the due date, so please plan accordingly.

Please give yourself ample time to complete all steps of the submission process: do not wait until right before the deadline to begin the process. Due to factors outside the CEC’s control and unrelated to the GSS system, upload times may be much longer than expected. For example, some past applicants experienced unexpected issues on their end, causing long delays that prevented timely submission. They spent significant time and resources on applications the CEC will not consider. Please plan accordingly. For instructions on how to apply using the GSS system, please see the How to Apply document available on the CEC website at: [https://www.energy.ca.gov/media/1654](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.energy.ca.gov%2Fmedia%2F1654&data=04%7C01%7C%7C817e9b823203445df9fb08d99e6003f0%7Cac3a124413f44ef68d1bbaa27148194e%7C0%7C0%7C637714957481962127%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=0kp4Rrki60lwhuOQrx%2F%2BM7B48HdUhQtmDQX1dGbf6Rc%3D&reserved=0).

First time users must register as a new user to access the system. Applicants will receive a confirmation email after all required documents have been successfully uploaded. A tutorial of the system will be provided at the pre-application workshop and you may contact the CAO identified in the Questions section of the solicitation for more assistance.

## Page Limitations

The project narrative is limited to **15 pages.** Application forms, resumes, scope of work, schedule of products and due dates, budget forms, contact list, letters of support/commitment, CEQA worksheet, and Localized Health Impacts Information forms **do not count** toward this page limitation.

## Application Organization

All items listed below are required as part of the application package. Failure to provide any items may result in disqualification of the application. Attachment requirements are expanded and explained below in this section and in the attachments themselves.

For projects with only Phase 1, do not submit a “Phase 2 Budget Form.”

For projects with both Phase 1 and a proposed Phase 2, the “Scope of Work” and “Schedule of Products and Due Dates” should include Phase 1 **and** Phase 2 activities, with Phase 2 activities clearly indicated as such. However, budgeting for each phase should be submitted **separately** as “Phase 1 Budget Form” and “Phase 2 Budget Form.”

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| **Form** | **Attachment Number** | **Action Needed by Applicant** |
| Application Form | Attachment 1 | Complete form. |
| Project Narrative | N/A | Create document. See “Section III.D.2 Project Narrative” below for instructions. |
| Scope of Work | Attachment 2 | Complete document. Include all proposed project activities, including for Phase 2 if applicable. |
| Schedule of Products and Due Dates | Attachment 3 | Complete document. Include all proposed project activities, including for Phase 2 if applicable. |
| Phase 1 Budget Form | Attachment 4 | Complete form. Include budget items for Phase 1 activities only. |
| Phase 2 Budget Form | Attachment 4 | Complete form. Include budget items for Phase 2 activities only; do not submit this item if the project does not include Phase 2. |
| Resumes | N/A | Submit documents. |
| Contact List | Attachment 5 | Complete form. |
| Letters of Support/Commitment | N/A | Submit documents if applicable. |
| CEQA Worksheet | Attachment 6 | Complete form. |
| Localized Health Impacts Information Form | Attachment 7 | Complete form. |
| Past Performance Reference Form(s) | Attachment 8 | Complete form. |

1. **Application Form (Attachment 1)**

Applicants must include a completed Application Form.

All Applicants must authorize CEC to make any inquiries necessary to verify the information presented in the application. Further, all Applicants must authorize CEC to obtain a credit report on the applicant’s organization.

**Do not include confidential information in any part of a submitted application.** **The CEC shall not accept or retain applications that have any portion marked confidential.** Please ensure that any document templates used do not unintentionally indicate that confidential information is provided (for example, “Confidential” markings in headers or footers).

All Applicants must certify under penalty of perjury under the laws of the State of California that:

* All information in the application is correct and complete to the best of the applicant’s knowledge.
* The Applicant has read and understands the terms and conditions and special terms and conditions and will accept them without negotiation if awarded.
* The Applicant has received any required licenses (such as copyrights or trademarks) applicable to the submitted application.
* The person electronically submitting the application through the Grant Solicitation System is an authorized representative of the Applicant.

***For Applicants using the electronic submission through the Grant Solicitation System***, checking the “I Agree” box and clicking the “I Agree & Submit” button provides the required authorizations and certifications.

The CEC **may** have waived the requirement for a signature on application materials for this solicitation. If a notice regarding the CEC’s waiver of the signature requirement appears on the [CEC's solicitation information website](https://www.energy.ca.gov/funding-opportunities/solicitations): https://www.energy.ca.gov/funding-opportunities/solicitations, the waiver applies to this solicitation. In the event of a conflict between the notice and any language in this solicitation regarding signatures, the notice will govern.

1. **Project Narrative**

The Project Narrative is a detailed description of the proposed project, its goals and objectives, and an explanation of how these will be implemented through the tasks described in the Scope of Work.

**Do not include confidential information in any part of a submitted application.** Please ensure that any document templates used do not unintentionally indicate that confidential information is provided (for example, “Confidential” markings in headers or footers). The CEC shall not accept or retain applications that have any portion marked confidential**.**

Applicants must address each of the scoring criteria described in this solicitation by providing sufficient, unambiguous detail so the evaluation team will be able to evaluate the application against each scoring criterion

The Project Narrative shall respond directly to each of the narrative prompts below.

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| **#** | **Narrative Prompt** |
| **1** | **Product Readiness.** Describe existing product capabilities and target product improvements. Describe and quantify the resources needed to achieve the target product improvements within the project term. |
| **2** | **Grid Signal Integration.** Describe the product’s capability to retrieve dynamic grid signals. Describe how the product will meet the minimum grid signal integration requirements described in Section II-B (MIDAS, ELRP, other APIs, and so on). |
| **3** | **Collecting Customer Input.** Describe the product’s capability to collect a range of customer inputs, preferences, and mobility requirements – for example, requested range, departure time, and so on. Describe strategies to automate communication of mobility requirements and minimize manual customer input. For projects involving EVSE, describe plans to implement ISO 15118 for automated communication of mobility requirements with compatible vehicles. |
| **4** | **Charge Management and Optimization.** Describe how the product will optimize the charging schedule around dynamic grid signals while meeting customer mobility needs and ensuring customer confidence. Describe any use of predictive algorithms. Describe how the product will help customers understand the charge management strategy, including any ability for customers to customize the charge management strategy. Describe how the product will support grid reliability, maximize the use of renewable electricity, minimize on-peak consumption, and respond during grid emergency events (such as Flex Alerts, ELRP events, and DSGS events). If applicable, describe any support for transactive energy and participation in the SCE Dynamic Rates Pilot. If applicable, describe any support for bidirectional charging, including any collaboration with automakers and controls to mitigate battery wear. |
| **5** | **Customer Value.** Describe how the product creates value for the customer by responding to grid signals. That is, describe how the product presents compensation from responding to grid signals in a meaningful way to the customer – this could be a tally of electricity bill savings, a flat rate subscription for charging, non monetary rewards or points, and so forth. Describe any gamification strategies used, if applicable. Describe how the product helps customers easily enroll in programs to be compensated for flexibility (rates, demand response programs, and so forth). |
| **6** | **Product Cost/Fees.** Describe expected pricing and fees for acquiring, purchasing, and/or using the developed product for a typical customer. |
| **7** | **Interoperability.** Describe how the product supports interoperability and meets the minimum interoperability requirements.   * Describe how CEC funds will help improve interoperability. * (For charging station management system products) Describe compliance with OCPP (including version number) and plans for Open Charge Alliance certification. Describe how the product supports easy network migration (that is, how an EVSE currently connected to the backend can easily switch to a different backend). Describe the product’s capabilities and/or plans for upgrading to newer versions of OCPP, if applicable. * (For EVSE products) Describe compliance with OCPP (including version number) and plans for Open Charge Alliance certification. Describe how the product supports easy network migration (to and from different OCPP backends). Describe the product’s capabilities and/or plans for remotely upgrading to newer versions of OCPP, if applicable. Describe connector types supported. Describe software support for ISO 15118, including version and use cases. Describe how CEC funds will help accelerate implementation of ISO 15118-20. * (For aggregators, automation service providers, and other products) Describe how the product functions with multiple EV and/or EVSE brands. Quantify and list the EV and/or EVSE brands supported by the product. |
| **8** | **Submetering and Additional Capabilities.** If applicable, describe the product’s support for submetered billing for EV charging, including coordination with meter data management agents and utilities. Describe any capabilities beyond the minimum requirements, such as integration with local energy management systems, support for Low Carbon Fuel Standard smart charging credits, and other capabilities. |
| **9a** | **Phase 1 Customer Deployment Plan.** Describe plans for meeting or exceeding minimum Phase 1 deployment requirements described in Section II.B and ensuring success with the customer. Describe:   * The number of expected customer installations, the installation types (existing EVSE, new bidirectional EVSE, telematics connection to existing vehicle, and so on) and resulting deployment credits (minimum 100 deployment credits across three distinct electric utility accounts).[[14]](#footnote-15) * Plans to ensure at least 35 percent of deployments are with customers enrolled on a dynamic rate. Discuss any coordination with utilities, plans to focus on specific dynamic rate offerings and/or pilots, and the anticipated availability of specific dynamic rates for customer enrollment. Discuss any bill protection strategies or other assurances for customers enrolling onto dynamic rates, if applicable. * Any costs to be shouldered by the customer, such as site installation, onboarding fees, recurring product fees, and other expenses, if applicable. * Anticipated focus segments, such as single family, multi family, commercial fleet, school bus, and so on. If applicable, discuss anticipated focus regions, cities, and/or communities. (All deployments must be at existing structures or facilities and involve negligible or no expansion of the existing or former use). * Coordination to facilitate customer site installation, such as with permitting authorities, contractors (including any targets for local hiring and plans to meet any applicable EVITP requirements; see Section II-B), and so on, if applicable. * Plans to ensure sustained customer value beyond the project term. * Anticipated EVSE models to be installed at customer sites, if applicable. (All EVSE deployed through this solicitation must be safety certified by a Nationally Recognized Testing Laboratory and OCPP compliant; see Section II.B). * Plans for participation in the SCE Dynamic Rates Pilot, if applicable.[[15]](#footnote-16) * Plans for deployments with bidirectional charging, including any preparation steps such as electrical readiness and utility interconnection, if applicable. Specify whether bidirectional charging will be grid-interactive or islanded operation only. |
| **9b** | **Phase 1 Customer Deployment Timeline.** For Phase 1, describe when the project plans to deploy to the first customer (month and year) and when the project expects to have deployed to the last customer (month and year). Projects with earlier deployments will receive favorable scoring in this category (see Section E). If applicable, describe any plans for phasing the deployment process (for example, a product might only offer capability to respond to ELRP signals during the initial rollout, with dynamic rate response enabled once the customer has successfully enrolled onto a dynamic rate). |
| **10** | **Priority Community Engagement, Deployment, and Benefits.** Describe plans for:   * Ensuring at least 50 percent of deployments are located within a disadvantaged or low-income community based on the [California Climate Investments Priority Populations 2022 CES 4.0 map](https://webmaps.arb.ca.gov/PriorityPopulations/). * Ensuring context-appropriate outreach, education, and engagement with priority communities. * Collaboration with community-based organizations (please specify) for outreach, education, engagement, and installation in priority communities, if applicable. Projects with community-based organization involvement will receive favorable scoring in this category (see Section E). |
| **11** | **Data Reporting.** Describe plans for collecting data and meeting the minimum data reporting requirements, including:   * Protocols, systems, and tools used to ensure accurate data sampling at 15-minute intervals (or higher resolution). * Plans to leverage protocols (such as OCPP), systems, and tools to facilitate data collection, transfer, and reporting, if applicable. |
| **12** | **Team Experience and Qualifications.** Describe the Applicant’s experience with and qualifications in developing charging products (especially those with vehicle-grid integration features) and deploying with customers (including outreach, onboarding, and relationship development). Applicants with firsthand experience and successes in these areas will be scored more favorably. Separately, describe relevant experience and qualifications of other project team members. If applicable, describe performance on prior CEC awards of the Applicant and any project team members, including timeliness, execution, communication, and project success. |
| **13** | **Phase 1 Project Budget.** Describe and justify the appropriateness of the requested funds. Projects with lower costs per deployment will be scored higher in this category (see Section E). |
| **14a** | **Phase 2 Customer Deployment Plan (only for applications with a proposed Phase 2).** Describe plans for meeting or exceeding minimum Phase 2 deployment requirements described in Section II-B and ensuring success with the customer. Describe:   * The number of additional customer installations, the installation types (existing EVSE, new bidirectional EVSE, telematics connection to existing vehicle, and so on) and resulting deployment credits. * Plans to ensure at least 50 percent of additional deployments are with customers enrolled on a dynamic rate. Discuss any coordination with utilities, plans to focus on specific dynamic rate offerings and/or pilots, and the anticipated availability of specific dynamic rates for customer enrollment. Discuss any bill protection strategies or other assurances for customers enrolling onto dynamic rates, if applicable. * Any costs to be shouldered by the customer, such as site installation, onboarding fees, recurring product fees, and other expenses, if applicable. * Anticipated customer segments, such as single-family, multi-family, commercial fleet, school bus, and so on. If applicable, discuss anticipated focus regions, cities, and/or communities. (All deployments must be at existing structures or facilities and involve negligible or no expansion of the existing or former use). * Coordination to facilitate customer site installation, such as with permitting authorities, contractors (including any targets for local hiring and plans to meet any applicable EVITP requirements; see Section II-B), and so on, if applicable. * Plans to ensure sustained customer value beyond the project term. * Anticipated EVSE models to be installed at customer sites, if applicable. (All EVSE deployed through this solicitation must be safety certified by a Nationally Recognized Testing Laboratory and OCPP compliant; see Section II-B). * Plans for participation in the SCE Dynamic Rates Pilot, if applicable.[[16]](#footnote-17) * Plans for deployments with bidirectional charging, including any preparation steps such as electrical readiness and utility interconnection, if applicable. Specify whether bidirectional charging will be grid-interactive or islanded operation only. |
| **14b** | **Phase 2 Customer Deployment Timeline (only for applications with a proposed Phase 2).** Describe when the project plans to begin and complete Phase 2 deployments (month and year). Projects with earlier deployments will receive favorable scoring in this category (see Section E). If applicable, describe any plans for phasing the deployment process (for example, a product might only offer capability to respond to ELRP signals during the initial rollout, with dynamic rate response enabled once the customer has successfully enrolled onto a dynamic rate). |
| **15** | **Phase 2 Project Budget (only for applications with a proposed Phase 2).** Describe and justify the appropriateness of the requested funds. Projects with lower costs per deployment will be scored higher in this category (see Section E). |

1. **Scope of Work (Attachment 2)**

Applicants must include a comprehensive and credible Scope of Work utilizing the template contained in Attachment 2. The description of activities proposed in the Project Narrative must conform to the Tasks described in the Scope of Work. Electronic files for the Scope of Work must be in MS Word.

Applicants shall submit a single Scope of Work document, including for projects which include a proposed Phase 2. For projects with a proposed Phase 2, all Phase 2 activities should be clearly indicated as such in the Scope of Work.

1. **Schedule of Products and Due Dates (Attachment 3)**

Applicants must include a completed Schedule of Products and Due Dates. Phase 1 project work must be completed by no later than March 31, 2026. Phase 2 project work must be completed by no later than March 31, 2029. These dates are determined by funding liquidation deadlines and may be subject to change. Instructions are included in the Schedule of Products and Due Dates template. The Schedule of Products and Due Dates must be in MS Excel.

Applicants shall submit a single Schedule of Products and Due Dates spreadsheet, including for projects which include a proposed Phase 2. For projects with a proposed Phase 2, all Phase 2 activities should be clearly indicated as such in the Schedule of Products and Due Dates.

1. **Budget Forms (Attachment 4)**

All applications must include a “Phase 1 Budget Form” using the template provided in Attachment 4. The “Phase 1 Budget Form” shall cover only activities in Phase 1.

Projects with an additional proposed Phase 2 must include a separate “Phase 2 Budget Form” using the same template. The “Phase 2 Budget Form” shall cover only activities in Phase 2. The Evaluation Committee will consider both budget forms during application evaluation.

Awarded projects must be approved at a CEC Business Meeting and the agreement must be executed before the grant recipient may begin invoicing CEC. At the Business Meeting approving an awarded project, CEC may approve funding for up to the sum of the project’s Phase 1 and Phase 2 budgets. However, CEC will only approve the “Phase 1 Budget Form” as the project budget. Once the project becomes eligible to proceed to Phase 2 and if funding is available, CEC may work with the Applicant to amend the project budget to include Phase 2 expenses.

1. The Applicant must submit information on ***all*** tabs of the budget forms. The salaries, rates, and other costs entered must reflect the salaries, rates, and other costs the Applicant would include if selected as a grant recipient. **A separate set of complete budget forms is required for the Applicant and for each subaward containing $100,000 or more of CEC funds.**
2. Detailed instructions for completing these forms are included at the beginning of Attachment 4.
3. Rates and job descriptions shown must reflect rates and job descriptions charged under an agreement resulting from this solicitation. The salaries, rates, and other costs entered on these forms become a part of the final agreement. The entire term of the agreement and projected rate increases must be considered when preparing the budget. Unless a federally approved indirect rate is used, indirect rates proposed are considered capped and shall not change during the term of the agreement. The grant recipient shall only be reimbursed for their ***actual*** rates up to the indirect rate cap. A description of available indirect rate options is available on the ECAMS Resources webpage under [Budget Category Guidance](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources/budget-category-guidance?auHash=cEItgat6JNbO9BFGeVqe4E5T6koCOgTaqliFX6bmwtg) for indirect rates. Unlike indirect rates, the rates for Direct Labor and Fringe Benefits are treated as estimates; a grant recipient can invoice at higher rates as long as it is only invoicing for ***actual*** expenditures it has made. The hourly or monthly rates provided shall be unloaded (before fringe benefits or indirect costs).
4. The information provided in these forms will ***not*** be kept confidential.
5. All reimbursable expenditures must be expended within the approved term of the grant agreement. Expenditures may be counted as match share only after CEC notifies the Applicant that its project has been proposed for an award through the release of a Notice of Proposed Awards (NOPA). However, match expenditures incurred after release of the NOPA but prior to the execution of a grant agreement are made solely at the Applicant’s own risk.
6. Applicants must budget for the expenses of a Kick-off Meeting, at least one (1) Critical Project Review meeting, and a Final meeting. Meetings may be conducted at the CEC or by conference call, as determined by the CAM.
7. Applicants must budget for permits, insurance, etc. CEC will not reimburse expenditures for permitting or insurance. However, these expenditures can be included as match share expenditure.
8. Applicants must budget for the preparation and submission of quarterly progress reports during the term of the agreement, and a Final Report. Instructions for preparing the Final Report will be provided to Applicants that are proposed for funding.
9. The purchase of equipment (defined as items with a unit cost greater than $5,000 and a useful life of greater than one year) with CEC funds will require disposition of purchased equipment at the end of the project. Typically, grant recipients may continue to utilize equipment purchased with CEC funds as long as the use is consistent with the intent of the original agreement. ***There are no disposition requirements for equipment purchased with match share funding.***
10. The Budget must reflect estimates for ***actual*** costs to be incurred during the approved term of the agreement. CEC can only approve and reimburse for actual costs that are properly documented in accordance with the grant agreement terms and conditions.
11. Applicants shall ***NOT*** budget for, and ***CANNOT*** be reimbursed for, more than their actual allowable expenses (i.e., the budget cannot include profit, fees, or markups) under the agreement. Subrecipients (all tiers) are allowed to include up to a maximum total of 10% profit, fees, or mark-ups on their own actual allowable expenses less any expenses budgeted to sub-subrecipients (i.e., profit, fees and markups are not allowed on lower tier subrecipient expenses). For example, if a subrecipient has $100,000 in actual allowable costs but has budgeted $20,000 to a sub-subrecipient, then the subrecipient can only include up to 10% profit on $80,000 ($100,000 minus $20,000). See terms and conditions for additional restrictions and requirements.
12. ***IMPORTANT - Payment of Prevailing Wage:*** Applicants must read and pay particular attention to the terms and conditions section related to Public Works and payment of Prevailing Wages. Prevailing wage rates can be significantly higher than non-prevailing wage rates. Failure to pay legally required prevailing wage rates can result in substantial damages and financial penalties, termination of the grant agreement, disruption of projects, and other complications.
13. **Resumes**

Applicants must include resumes for key personnel identified in the application. “Key personnel” are individuals that are critical to the project due to their experience, knowledge and/or capabilities. Resumes are limited to a maximum of 2 pages each.

1. **Contact List (Attachment 5)**

Applicants must include a completed Contact List by including the appropriate points of contact for the Applicant. CEC will complete the CEC points of contact during agreement development.

1. **Letters of Commitment and Support**

Applicants must include appropriate **letters of commitment** from each key project partner and third-party match share contributor, if applicable. Letters must include sufficient contact information for CEC to efficiently contact the letter writer. Letters are limited to 2 pages each. Projects with no additional project partners do not need to submit letters of commitment.

* 1. **Key Project Partners (if applicable):** Key project partners identified in the application must provide letters demonstrating their commitment to the proposed project and their ability to fulfill their identified roles.
  2. **Third-party Match Share Contributors (if applicable):** Any third-party match share contributors must identify the amount of match that will be committed to the project, the funding source(s), and state that the match share contributor will provide the identified match funding. Letters of commitment from third party match share contributors must contain a telephone number and email address to allow CEC to contact the match share partner or representative to confirm their authority to commit matching funds to the proposed project.

Applicants may optionally submit **letters of support** that detail the estimated demand and/or the potential benefits of the proposed project. Letters are limited to 2 pages each. Do not submit more than 4 letters of support.

1. **CEQA Worksheet (Attachment 6)**

Applicants must include a completed CEQA Worksheet. CEC requires this information to assist it in making its own determination under the California Environmental Quality Act (Public Resources Code Section §§ 21000 et seq).

Applicants must complete the detailed CEQA Worksheet and submit it with their application. This worksheet will help Applicants and CEC to determine CEQA compliance obligations by identifying which projects may require more extensive CEQA review. Failure to complete the worksheet may lead to disqualification of the proposal.

Applicants are encouraged to provide documentation of communication with the local lead agency, if one exists (e.g., a county or city). Documentation such as a completed notice of exemption, a letter from the local agency acknowledging its role in the CEQA process, or a permit application to the lead agency that is stamped as received. If no CEQA review would be required by the local lead agency, provide documentation (for example, a letter or e-mail) from the local agency explaining why CEQA review is not required.

9a. **Additional Requirements**

* Time is of the essence. Funds available under this solicitation have encumbrance deadlines as early as June 30, 2024. This means that the CEC must approve proposed awards at a business meeting (usually held monthly) prior to June 30, 2024, in order to avoid expiration of the funds. Prior to approval and encumbrance, the CEC must comply with the California Environmental Quality Act (CEQA). To comply with CEQA, the CEC must have CEQA-related information from Applicants and sometimes other entities, such as local governments, in a timely manner. Unfortunately, even with this information, the CEC may not be able to complete its CEQA review prior to the encumbrance deadline for every project. For example, if a project requires an Environmental Impact Report, the process to complete it can take many months. For these reasons, it is critical that Applicants organize project proposals in a manner that minimizes the time required for the CEC to comply with CEQA and provide all CEQA-related information to the CEC in a timely manner such that the CEC is able to complete its review in time for it to meet its encumbrance deadline.
* Reservation of right to cancel proposed award. In addition to any other right reserved to it under this solicitation or that it otherwise has, if the CEC determines, in its sole and absolute discretion, that the CEQA review associated with a proposed project would not likely be completed prior to the encumbrance deadline referenced above, and that the CEC’s ability to meet its encumbrance deadline may thereby be jeopardized, the CEC may cancel a proposed award and award funds to the next highest scoring Applicant, regardless of the originally proposed Applicant’s diligence in submitting information and materials for CEQA review. Examples of situations that may arise related to CEQA review include but are not limited to:
* Example 1: If another state agency or local jurisdiction, such as a city or county, must take the role of lead agency under CEQA, the CEC’s review may be delayed while waiting for a determination from the lead agency.
* Example 2: If the proposed work is part of a larger project for which a detailed environmental analysis has been or will be prepared by another state agency or local jurisdiction, the CEC’s review may be delayed as a result of waiting for a supplemental or initial analysis, respectively, from the other agency.
* Example 3: If the nature of the proposed work is such that a project is not categorically or otherwise exempt from the requirements of CEQA, and an initial study or other detailed environmental analysis appears to be necessary, the CEC’s review, or the lead agency’s review, may take longer than the time available to encumber the funds. If an initial study or environmental impact report has already been completed by another state agency or a local jurisdiction, serving as the lead agency, the Applicant must ensure that such an analysis covers the work in the proposed project, or must obtain a revised analysis and determination from the lead agency reviewing the proposed project.
* Example 4: If the proposed project clearly falls under a statutory or categorical exemption, or is project for which another state agency or local jurisdiction has already adopted a CEQA finding that the project will cause no significant effect on the environment, the project will likely have greater success in attaining rapid completion of CEQA requirements.

The above examples are not exhaustive of instances in which the CEC may or may not be able to comply with CEQA within the encumbrance deadline and are only provided as further clarification for potential applicants. Please plan project proposals accordingly.

1. **Localized Health Impacts Information Form (Attachment 7)**

Applicants must complete and submit a Localized Health Impacts Information Form. CEC requires this information to assist in developing and publishing a localized health impact report.

1. **Past Performance Reference Form(s) (Attachment 8)**

Applicants must complete and submit a separate Past Performance Reference Form for each CEC agreement (e.g., contract, grant or loan) received by the Applicant in the last 10 years and the 5 most recent agreements with other public agencies within the past 10 years.

# IV. Evaluation Process and Criteria

## Application Evaluation

Applications will be evaluated and scored based on the responses to the information requested in this solicitation and on any other information available such as past performance of CEC agreements.[[17]](#footnote-18) The entire evaluation process from receipt of applications to posting of the Notice of Proposed Award is confidential.

To evaluate all applications, CEC will organize an Evaluation Committee that may consist of CEC staff or staff of other California state entities.

* 1. **Screening Criteria**

The Contracts, Grants and Loans Office will screen applications for compliance with the Administrative Screening Criteria. The Evaluation Committee will screen applications for compliance with the Technical Screening Criteria. Applications that fail any of the Administrative or Technical Screening Criteria will be rejected.

* 1. **Administrative Screening Criteria**

| **ADMINISTRATIVE Screening Criteria**  *The Application must pass ALL administrative screening criteria.* | **Pass/Fail** |
| --- | --- |
| 1. The application is received by CEC’s Contracts, Grants, and Loans Office by the due date and time specified in the “Key Activities Schedule” in Section I of this solicitation. | Pass  Fail |
| 1. The Applicant provides the required authorizations and certifications. | Pass  Fail |
| 1. The Applicant has not included a statement that is contrary to the required authorizations and certifications. | Pass  Fail |

* 1. **Technical Screening Criteria**
  2. The Applicant is an eligible Applicant.
  3. The project is an eligible project.
  4. The project meets the minimum match share requirement.
  5. The Applicant passes the past performance screening criterion.
  6. **Applicant’s Past Performance Screening Criterion (Pass/Fail)**

An Applicant may be disqualified under this solicitation due to severe performance issues under one or more prior or active CEC agreement(s) within the last 10 years. In this context, an Applicant is defined as at least one of the following: the business, principal investigator, or lead individual acting on behalf of themselves—received funds from the CEC (e.g., contract, grant, or loan) and entered into an agreement(s) with the CEC. Any Applicant that does not have an active or prior agreement equates to no severe performance issues and therefore would pass this screening criterion.

Severe performance issuesare characterized by significant negative outcomes under an agreement and may include:

* + Agreement was terminated with cause.
  + CEC filed litigation against the Applicant.
  + Severe audit findings are not resolved to CEC’s satisfaction. Severe audit findings may include but are not limited to incomplete or unsatisfactory deliverables, grant funds used inappropriately (i.e., other than as represented), or questioned costs.
  + Project objectives were not met and were caused by factors that are, or should have been, within the Recipient’s control.
  + Significant delays in project completion resulting in delayed benefits for California. Project completion delays of one year or more from the originally proposed project schedule and caused by factors within the Recipient’s control may be considered significant.
  + Deliverables were not submitted to the CEC or were of poor quality. For example, Applicant delivered poorly written reports that required significant rework by staff prior to acceptance or publication.
  + Demonstrated and documented poor or delayed communication when significant issues or setbacks were experienced that materially and negatively impacted the project. For example, delays in informing the CEC when the Applicant experienced loss of a key project partner or site control may be considered significant.
  1. **Grounds to Reject an Application**

In addition to the Screening Criteria identified within this solicitation, CEC reserves the right to reject an application and/or cancel an award if at any time during the application or agreement process for reasons including, but not limited to the following:

1. The application contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Applicant.
2. The application is intended to erroneously and fallaciously mislead the State in its evaluation of the application and the attribute, condition, or capability is a requirement of this solicitation.
3. The application does not comply or contains caveats that conflict with the solicitation and the variation or deviation is material or it is otherwise non-responsive.
4. The application is marked as confidential. The CEC shall not accept or retain applications that have any portion marked confidential.
5. By submitting a bid or proposal, Applicant represents that it is not a target of Economic Sanctions (see Section II.A.5 above). Should the State determine Applicant/Recipient is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of the Applicant’s bid/proposal any time prior to contract execution, or, if determined after contract execution, shall be grounds for termination by the State.
   1. **Technical Evaluation**

Applications passing all screening criteria will be submitted to the Evaluation Committee to review and score based on the Evaluation Criteria using the Scoring Scale described below.

The Evaluation Committee reserves the right to schedule a clarification interview with an Applicant that will either be held by telephone or in person at CEC for the purpose of clarification and verification of information provided in the application. However, these interviews may not be used to change or add to the contents of the original application. Applicants will not be reimbursed for time spent answering clarifying questions.

The total score for each application will be the average of the combined scores of all Evaluation Committee members. A minimum score of 70 percent is required for the application to be eligible for funding.

CEC will recommend awards to the highest ranked projects (according to final overall application score) until available funding under this solicitation has been exhausted.

## Notice of Proposed Awards

The results of the evaluation will be posted in a Notice of Proposed Awards (NOPA) and will include: (1) the total proposed funding amount, (2) the score rank order of Applicants, and (3) the amount of each proposed award. Funding for Phase 1 will be distributed based on the rank order of the Applicants. Funding for Phase 2 will be distributed on a first-come, first-served basis for projects which proposed a Phase 2 and for which CEC determines that specified performance criteria have been met (see Section II.B.4). CEC will publish the NOPA on the CEC’s website.

## Debriefings

Applicants may request a debriefing after the release of the NOPA by emailing the CAO listed in Part I. A request for debriefing should be received no later than 15 days after the NOPA is released.

## Scoring Scale

Using this Scoring Scale, the Evaluation Committee will give a score for each criterion described in the Evaluation Criteria.

|  |  |  |
| --- | --- | --- |
| **% of Possible Points** | **Interpretation** | **Explanation for Percentage Points** |
| 0% | Not Responsive | Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable. |
| 10-30% | Minimally Responsive | Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable. |
| 40-60% | Inadequate | Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution. |
| 70% | Adequate | Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable. |
| 75% | Between Adequate and Good | Response better than adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable. |
| 80% | Good | Response fully addresses the requirements being scored with a good degree of confidence in the applicant’s response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable. |
| 85% | Between Good and Excellent | Response fully addresses the requirements being scored with a better than good degree of confidence in the applicant’s response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable. |
| 90% | Excellent | Response fully addresses the requirements being scored with a high degree of confidence in the applicant’s response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations. |
| 95% | Between Excellent and Exceptional | Response fully addresses the requirements being scored with a better than excellent degree of confidence in the Applicant’s response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations. |
| 100% | Exceptional | All requirements are addressed with the highest degree of confidence in the Applicant’s response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution. |

## Evaluation Criteria

Each project narrative prompt under Section III.D.2 maps to an evaluation criterion. **Applicants should address the evaluation criterion below by responding fully to each of the project narrative prompts described in Section III.D.2.** Some evaluation criteria are calculated by formula. Evaluation criteria marked “bonus” present opportunities to earn additional points that are not included in the denominator when calculating the final score. Criteria 14-15 only apply to projects with a proposed Phase 2. (That is, they are not scored or included in the denominator for projects with only Phase 1).

|  |  |  |
| --- | --- | --- |
| **#** | **Criterion Description** | **Possible Points** |
| **1** | **Product Readiness.** Applications will be evaluated on the degree to which the Applicant:   * Describes existing product capabilities and target product improvements. * Describes and quantifies the resources needed to achieve the target product improvements within the project term. | 5 |
| **2** | **Grid Signal Integration.** Applications will be evaluated on the degree to which the product:   * Is capable of retrieving dynamic grid signals. * Meets the minimum grid signal integration requirements (MIDAS, ELRP, other APIs, and so on). | 6 |
| **3** | **Collecting Customer Input.** Applications will be evaluated on the degree to which the product:   * Is capable of collecting a range of customer inputs, preferences, and mobility requirements. * Uses strategies to automate communication of mobility requirements and minimize manual customer input. * (For EVSE projects) Will implement ISO 15118 for automated communication of mobility requirements with compatible vehicles. | 10 |
| **4a** | **Charge Management and Optimization.** Applications will be evaluated on the degree to which the product:   * Is capable of optimizing the charging schedule around dynamic grid signals while meeting customer mobility needs and ensuring customer confidence, including any use of predictive algorithms. * Helps customers understand and customize the charge management strategy. * Will support grid reliability, maximize the use of renewable electricity, minimize on-peak consumption, and respond during grid emergency events. * Is capable of executing transactive energy tenders and participating in the SCE Dynamic Rates Pilot, if applicable * Is capable of bidirectional charging, including any controls to mitigate battery wear and collaboration with automakers, if applicable | 15 |
| **4b** | **SCE Dynamic Rates Pilot and Transactive Energy Capability (bonus).** Applications will be evaluated on the degree to which the product is capable of executing transactive energy tenders and participating in the SCE Dynamic Rates pilot. | 2 |
| **4c** | **Bidirectional Charging Capabilities (bonus).** Applications will be evaluated on the degree to which the product supports bidirectional charging. | 1.5 |
| **5** | **Customer Value.** Applications will be evaluated on the degree to which the Applicant describes:   * How the product creates value for the customer by responding to grid signals. * How the product presents compensation from responding to grid signals in a meaningful way to the customer * Any gamification strategies used, if applicable. * How the product helps customers easily enroll in programs to be compensated for flexibility. | 11 |
| **6** | **Product Cost/Fees.** Applications will be evaluated on the transparency and affordability of expected fees for acquiring, purchasing, and using the developed product. | 7 |
| **7** | **Interoperability.** Applications will be evaluated on how the product meets the minimum interoperability requirements. Applications will be evaluated on the degree to which the Applicant:   * Describes how CEC funds will help improve interoperability. * (For charging station management system products) Describes compliance with OCPP (including version number; implementation of newer versions of OCPP will be scored higher) and any plans for Open Charge Alliance certification. Describes how the product supports easy network migration. Describes the product’s capabilities and/or plans for upgrading to future versions of OCPP, if applicable. * (For EVSE products) Describes compliance with OCPP (including version number; implementation of newer versions of OCPP will be scored higher) and any plans for Open Charge Alliance certification. Describes how the product supports easy network migration. Describes the product’s capabilities and/or plans for remotely upgrading to future versions of OCPP, if applicable. Describes connector types supported. Describes software support for ISO 15118, including version and use cases. Describes how CEC funds will help accelerate implementation of ISO 15118-20. * (For aggregators, automation service providers, and other products) Describes how the product functions with multiple EVs and/or EVSE brands. Quantifies and lists the EV and/or EVSE brands supported by the product. | 13 |
| **8a** | **Submetering (bonus).** Applications will be evaluated on the degree to which the product supports submetered billing for EV charging. | 2 |
| **8b** | **Additional Product Capabilities (bonus).** Applications will be evaluated on the degree to which the product supports additional capabilities beyond the minimum requirements, such as integration with local energy management systems, support for Low Carbon Fuel Standard smart charging credits, and other capabilities. | 1.5 |
| **9a** | **Phase 1 Customer Deployment Plan.** Applications will be evaluated on the degree to which the Applicant describes:   * The number of expected customer installations, the installation types (existing EVSE, new bidirectional EVSE, telematics connection to existing vehicle, and so on) and resulting deployment credits (minimum 100 deployment credits across three distinct electric utility accounts), with higher scores for applications with more deployment credits. * Plans to ensure at least 35 percent of deployments are with customers enrolled on a dynamic rate, with higher scores for applications with more customers on a dynamic rate. * Any coordination with utilities, plans to focus on specific dynamic rate offerings and/or pilots, and the anticipated availability of specific dynamic rates for customer enrollment. * Any bill protection strategies or other assurances for customers enrolling onto dynamic rates, if applicable. * Any costs to be shouldered by the customer, such as site installation, onboarding fees, recurring product fees, and other expenses, if applicable. * Anticipated customer segments, such as single-family, multi-family, commercial fleet, school bus, and so on. * Anticipated focus regions, cities, and/or communities, if applicable. * Coordination to facilitate customer site installation, such as with permitting authorities, contractors (including any targets for local hiring and plans to meet any applicable EVITP requirements; see Section II-B), and so on, if applicable. * Plans to ensure sustained customer value beyond the project term. * Anticipated EVSE models to be installed, if applicable. * Plans for participation in the SCE Dynamic Rates Pilot, if applicable. * Plans for deployments with bidirectional charging, if applicable, including any preparation steps such as electrical readiness and utility interconnection, and whether bidirectional charging will be grid-interactive or islanded operation only. | 21 |
| **9b** | **Phase 1 Customer Deployment Timeline.** Applications will be evaluated on the degree to which the Applicant describes:   * When the project plans to deploy to the first customer (month and year) and when the project expects to have deployed to the last customer (month and year). * Any plans for phasing the deployment process.   Projects which begin and complete customer deployments sooner will receive a favorable scoring. The score (in points, not percentage) for this criterion is calculated as follows:  Where is the number of months from October 2023 until the first customer deployment, and is the number of months from October 2023 until the final customer deployment. | 4 |
| **9c** | **Participation In the Southern California Edison Dynamic Rates Pilot (bonus).** Applications will be evaluated on the degree to which planned deployments will include customers participating in the Southern California Edison Dynamic Rates pilot.[[18]](#footnote-19) | 1.5 |
| **9d** | **Deployments With Bidirectional Charging (bonus).** Applications will be evaluated on the degree to which planned deployments include bidirectional charging, including any preparation steps such as electrical readiness and utility interconnection. | 1.5 |
| **10a** | **Priority Community Engagement, Deployment, and Benefits.** Applications will be evaluated on the degree to which the Applicant:   * Describes plans to ensure at least 50 percent of deployments are located within a disadvantaged or low-income community. * Describes plans to ensure context-appropriate outreach, education, and engagement with priority communities. * Describes plans to collaborate with specific community-based organizations for outreach, education, engagement, and installation in priority communities. | 11 |
| **10b** | **Community-Based Organization Involvement.** Applications will be evaluated on the degree to which the project includes collaboration with one or more community-based organizations. | 2 |
| **11** | **Data Reporting.** Applications will be evaluated on the degree to which the Applicant describes plans for collecting data and meeting the minimum data reporting requirements, including:   * Protocols, systems, and tools used to ensure accurate data sampling at 15-minute intervals (or higher resolution). * If applicable, plans to leverage existing protocols (such as OCPP), systems, and tools to facilitate data collection, transfer, and reporting. | 6 |
| **12** | **Team Experience and Qualifications.** Applications will be evaluated on the degree to which the Applicant describes:   * The applicant’s experience with and qualifications in developing charging products (especially those with vehicle-to-grid integration capabilities) and deploying with customers (including outreach, onboarding, and relationship development).   + Applicants with firsthand experience and successes in these areas will be scored more favorably. * Relevant experience and qualifications of other project team members. * If applicable, past performance on prior CEC awards, including timeliness, project execution, communication, and project success. | 11 |
| **13a** | **Phase 1 Project Budget.** Applications will be evaluated on the appropriateness and reasonableness of the Phase 1 budget across all budget categories. | 9 |
| **13b** | **Phase 1 Calculated Deployment Cost Factor.** Applications will be evaluated on the deployment cost factor score, which is calculated as follows:  Where is the total Phase 1 cost (that is, the total on the Phase 1 Budget Form) in dollars and is the total number of deployment credits expected.[[19]](#footnote-20) Failure to specify the number of expected customer deployments, deployment types, and resulting deployment credits will result in zero points for this scoring criterion. Applicants do not need to calculate the deployment cost factor (the evaluation team will calculate the factor as part of scoring). | 5 |
| **13c** | **Phase 1 Calculated Hardware Cost Factor.** Applications will be evaluated on the hardware cost factor. Projects installing no new charging hardware (such as EVSE) will receive no points for this criterion. The hardware cost factor is calculated as follows:  Where is the total Phase 1 cost (that is, the total on the Phase 1 Budget Form) in dollars and is the total number of deployment credits expected during Phase 1. Failure to specify the number of expected customer deployments, deployment types, and resulting deployment credits will result in zero points for this scoring criterion. Applicants do not need to calculate the hardware cost factor (the evaluation team will calculate the factor as part of scoring). | 3 |
| **14a** | **Phase 2 Customer Deployment Plan (optional).** Applications will be evaluated on the degree to which the Applicant describes:   * The number of additional customer installations, the installation types, and resulting deployment credits. * Plans to ensure at least 50 percent of additional deployments are with customers enrolled on a dynamic rate. * Any coordination with utilities, plans to focus on specific dynamic rate offerings and/or pilots, and the anticipated availability of specific dynamic rates for customer enrollment. * Any bill protection strategies or other assurances for customers enrolling onto dynamic rates, if applicable. * Any costs to be shouldered by the customer, such as site installation, onboarding fees, recurring product fees, and other expenses, if applicable. * Anticipated customer segments, such as single-family, multi-family, commercial fleet, school bus, and so on. * Anticipated focus regions, cities, and/or communities, if applicable. * Coordination to facilitate customer site installation, such as with permitting authorities, contractors (including any targets for local hiring and plans to meet any applicable EVITP requirements; see Section II-B), and so on, if applicable. * Plans to ensure sustained customer value beyond the project term. * Anticipated EVSE models to be installed, if applicable. * Plans for participation in the SCE Dynamic Rates Pilot, if applicable. * Plans for deployments with bidirectional charging, if applicable, including any preparation steps such as electrical readiness and utility interconnection, and whether bidirectional charging will be grid-interactive or islanded operation only. | 7 |
| **14b** | **Phase 2 Customer Deployment Timeline (optional).** Applications will be evaluated on the degree to which the Applicant describes:   * When the project plans to begin and complete Phase 2 deployments. * Any plans for phasing the deployment process.   Projects with earlier deployments will receive favorable scoring in this category (see Section E). | 3 |
| **15a** | **Phase 2 Project Budget (optional).** Applications will be evaluated on the appropriateness and reasonableness of the Phase 2 project budget across all budget categories. | 5 |
| **15b** | **Phase 2 Calculated CEC Deployment Cost Factor (optional).** Applications will be evaluated on the deployment cost factor score for Phase 2, which is calculated using the same formula as in criterion 13b. When calculating this score, is the total Phase 2 cost (that is, the total on the Phase 2 Budget Form) in dollars and is the total number of deployment credits expected during Phase 2. Failure to specify the number of expected customer deployments, deployment types, and resulting deployment credits will result in zero points for this scoring criterion.  Applications do not need to calculate the deployment cost factor as part of the project narrative (the evaluation team will calculate the factor as part of scoring). | 5 |
| **15c** | **Phase 2 Calculated Hardware Cost Factor (optional).** Applications will be evaluated on the hardware cost factor score for Phase 2, which is calculated using the same formula as in criterion 13c. When calculating this score, is the total Phase 2 cost (that is, the total on the Phase 2 Budget Form) in dollars and is the total number of deployment credits expected during Phase 2. Failure to specify the number of expected customer deployments, deployment types, and resulting deployment credits will result in zero points for this scoring criterion.  Projects installing no new charging hardware (such as EVSE) will receive no points for this criterion. Applications do not need to calculate the hardware cost factor as part of the project narrative (the evaluation team will calculate the factor as part of scoring) | 3 |
| **16** | **Match Share (bonus).** Applications will be evaluated on the level of additional match funding provided by the Applicant above the minimum required. Projects must provide minimum 25 percent match for Phase 1 and 50 percent match for Phase 2.  The score for this criterion will be calculated as follows, where is the match provided as a percentage of total Phase 1 project costs and is the match provided as a percentage of total Phase 2 project costs:  **Projects with Phase 1 Only:**  **Projects with Phases 1 & 2:** | 2 |
|  | **Total Possible Points** | 174 |
|  | **Score Calculation Denominator (Phase 1 Only Projects)** | 139 |
|  | **Score Calculation Denominator (Phases 1 & 2 Projects)** | 162 |
|  | **70% Passing Score (Phase 1 Only Projects)** | 97.3 |
|  | **70% Passing Score (Phases 1 & 2 Projects)** | 113.4 |

## Tie Breakers

If the score for two or more applications are tied, the application with a higher score in the Charge Management and Optimization criterion will be ranked higher. If still tied, an objective tiebreaker (such as a random drawing) will be utilized.

# V. Administration

## Definition of Key Words

Important definitions for this solicitation are presented below:

|  |  |
| --- | --- |
| **Word/Term** | **Definition** |
| Applicant | Respondent to this solicitation |
| Application | Formal written response to this document from Applicant |
| CAM | Commission Agreement Manager |
| CAO | Commission Agreement Officer |
| CEC | California Energy Commission |
| GAAP | Generally Accepted Accounting Principles |
| Solicitation | Grant Funding Opportunity, which refers to this entire solicitation document and all its attachments and exhibits |
| State | State of California |

## Cost of Developing Application

The Applicant is responsible for the cost of developing an application, and this cost cannot be charged to the State.

## Confidential Information

CEC shall not accept or retain any applications that have any portion marked confidential.

## Solicitation Cancellation and Amendments

It is CEC’s policy to not solicit applications unless there is a bona fide intention to award an agreement. However, if it is in the State’s best interest, CEC reserves the right, in addition to any other rights it has, to do any of the following:

* Cancel this solicitation;
* Revise the amount of funds available under this solicitation;
* Amend this solicitation as needed; and/or
* Reject any or all applications received in response to this solicitation.

If the solicitation is amended, CEC will send an addendum to all parties who requested the solicitation and will also post it on [CEC’s solicitation information website](http://www.energy.ca.gov/contracts/index.html) at www.energy.ca.gov/funding-opportunities/solicitations.

## Errors

If an Applicant discovers any ambiguity, conflict, discrepancy, omission, or other error in the solicitation at any time prior to 5:00 p.m. of the application deadline date, the Applicant should immediately notify CEC of such error in writing and request modification or clarification of the solicitation. The CEC will provide modifications or clarifications by written notice to all entities that requested the solicitation, without divulging the source of the request for clarification. The CEC shall not be responsible for failure to correct errors.

## Modifying or Withdrawal of Application

An Applicant may, by email to the CAO, withdraw or modify a submitted application before the deadline to submit applications. Applications cannot be changed after that date and time. An application cannot be “timed” to expire on a specific date. For example, a statement such as the following is non-responsive to the solicitation: “This application and the cost estimate are valid for 60 days.”

## Immaterial Defect

The CEC may waive any immaterial defect or deviation contained in an application. The CEC’s waiver shall in no way modify the application or excuse an Applicant proposed for funding from full compliance with solicitation requirements.

## Disposition of Applicant’s Documents

The entire evaluation process from receipt of applications up to the posting of the Notice of Proposed Award is confidential. On the Notice of Proposed Award posting date, or date of solicitation cancellation, all applications and related material submitted in response to this solicitation become a part of the property of the State and public record. Applicants who want any work examples they submitted with their applications returned to them shall make this request and provide either sufficient postage or a Courier Charge Code to fund the cost of returning the examples.

## Applicants’ Admonishment

This solicitation contains the instructions governing the requirements for a firm quotation to be submitted by interested applicants, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and applicant responsibilities. Applicants must take the responsibility to carefully read the entire solicitation, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, and make sure that all procedures and requirements of the solicitation are followed and appropriately addressed.

## Agreement Requirements

The content of this solicitation shall be incorporated by reference into the final agreement. See the sample agreement terms and conditions included in this solicitation.

CEC reserves the right to negotiate with Applicants to modify the project scope, the level of funding, or both. If CEC is unable to successfully negotiate and execute a funding agreement with an Applicant, CEC, at its sole discretion, reserves the right to cancel the pending award and fund the next highest ranked eligible project.

CEC must formally approve all proposed grant awards. Clean Transportation Program agreements for over $75,000 must be scheduled and considered at a CEC Business Meeting for approval by the CEC.

Public agencies proposed for funding under this solicitation must provide an authorizing resolution approved by their governing authority to enter into an agreement with CEC and designating an authorized representative to sign.

CEC will send the approved agreement, including the general Terms and Conditions and any additional terms and conditions, to the grant recipient for review, approval, and signature. Once the grant recipient signs, CEC will fully execute the agreement. Recipients are approved to begin the project only after full execution of the agreement.

## No Agreement Until Signed and Approved

No agreement between CEC and an Applicant is in effect until the agreement is signed by the Recipient, approved at a CEC Business Meeting, and signed by both the grant recipient and the CEC.

CEC reserves the right to modify the award documents prior to executing the agreement.

1. CEC’s block grant projects – CALeVIP, Communities in Charge, and EnergIIZE – provide rebates for charger installation in California. Beginning July 2023, all chargers funded through CEC block grants must be OCPP compliant and certified, and ISO 15118 Ready. REDWDS will build upon these requirements by translating these capabilities into realized vehicle-grid integration features and customer participation. [↑](#footnote-ref-2)
2. The [Load Management Standards update](https://www.energy.ca.gov/news/2022-10/cec-adopts-standards-help-consumers-save-energy-peak-times) “will help customers take better advantage of utilities’ lower time-dependent rates so smart appliances … can automatically respond to more frequent rate changes that reflect electricity grid conditions. This will save consumers money by shifting usage to times of cheaper or abundant electricity.” [↑](#footnote-ref-3)
3. These are sometimes referred to as “aggregators.” Automation service providers and aggregators which do not currently manage charging, but plan to develop capabilities to do so through this solicitation, are eligible. [↑](#footnote-ref-4)
4. An overview of MIDAS is available here: <https://www.energy.ca.gov/proceedings/energy-commission-proceedings/load-management-rulemaking/market-informed-demand> [↑](#footnote-ref-5)
5. An overview of the ELRP is available here: <https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/electric-costs/demand-response-dr/emergency-load-reduction-program>. Products must be capable of retrieving and responding to ELRP events; actual participation will depend on the individual customer and any applicable rules prohibiting dual participation. [↑](#footnote-ref-6)
6. The Demand Side Grid Support (DSGS) Program is similar to but distinct from the ELRP. DSGS events are called based on Energy Emergency Alerts issued by the California Independent System Operator (CAISO) <https://www.energy.ca.gov/programs-and-topics/programs/demand-side-grid-support-program> [↑](#footnote-ref-7)
7. <https://www.dret-ca.com/dynamic-rate-pilot/> [↑](#footnote-ref-8)
8. Beginning July 2023, all chargers funded through CEC’s block grant projects – including [CALeVIP](https://calevip.org/incentive-project/golden-state-priority-project), Communities in Charge, and EnergIIZE, must be ISO 15118 Ready. ISO 15118 Ready focuses on hardware readiness, and projects resulting from this solicitation can support software implementation to activate features on ISO 15118 Ready EVSE. [↑](#footnote-ref-9)
9. For details on the Open Charge Alliance certification process, see <https://www.openchargealliance.org/certification/ocpp-201-certification/> [↑](#footnote-ref-10)
10. Projects interested in deploying bidirectional EVSE for school buses should consider applying to [GFO-22-612](https://www.energy.ca.gov/solicitations/2023-04/gfo-22-612-electric-school-bus-bi-directional-infrastructure) Electric School Bus Bi-Directional Infrastructure. [↑](#footnote-ref-11)
11. For the purposes of this solicitation, dynamic rates are those that update hourly or more frequently. Pilot rates are eligible. Projects may help customers sign up for a dynamic rate as part of the deployment. A non-exhaustive list of existing and pending dynamic rates is available on slide 4: <https://efiling.energy.ca.gov/GetDocument.aspx?tn=244226> [↑](#footnote-ref-12)
12. A list of Nationally Recognized Test Laboratories certified by the Occupational Safety and Health Administration is available here: <https://www.osha.gov/nationally-recognized-testing-laboratory-program/its>. Labs must be recognized for EVSE testing to meet this requirement. [↑](#footnote-ref-13)
13. Full bill text: <https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201920200AB841> [↑](#footnote-ref-14)
14. Deployment credits are awarded based on the customer installation type. Refer to Requirement 2-1 in Section II-B for definitions and an explanation of deployment credits. [↑](#footnote-ref-15)
15. <https://www.dret-ca.com/dynamic-rate-pilot/> [↑](#footnote-ref-16)
16. <https://www.dret-ca.com/dynamic-rate-pilot/> [↑](#footnote-ref-17)
17. The Past Performance Evaluation is available on the CEC website at: https://www.energy.ca.gov/media/6595 [↑](#footnote-ref-18)
18. <https://www.dret-ca.com/dynamic-rate-pilot/> [↑](#footnote-ref-19)
19. Deployment credits are awarded based on the customer installation type. Refer to Requirement 2-1 in Section II-B for definitions and an explanation of deployment credits. [↑](#footnote-ref-20)