

**GRANT REQUEST FORM (GRF)**

CEC-270 (Revised 10/2015)

CALIFORNIA ENERGY COMMISSION

New Agreement ARV-16-013 (To be completed by CGL Office)

600 Fuels and Transportation Division	Adeel Ahmad	6	916-651-2077
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Sonoma County Regional Climate Protection Authority	27-2950600
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Sonoma County Drive EverGreen: Regional Readiness Plan Implementation	
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04 / 01 / 2017	05 / 1 / 2019	\$ 300,000
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ARFVTP agreements \$75K and under delegated to Executive Director.

Proposed Business Meeting Date 03 / 08 / 2017  Consent  Discussion

Business Meeting Presenter Sharon Purewal Time Needed: 5 minutes

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

**Agenda Item Subject and Description**

Proposed resolution approving Agreement ARV-16-013 with Sonoma County Regional Climate Protection Agency for a \$300,000 grant to provide needed resources and support to consumers and local government staff that will accelerate EV adoption in Sonoma County by establishing EV concierge service, training, streamline permitting, and survey future EVCS installation with high potential.

1. Is Agreement considered a "Project" under CEQA?

Yes (skip to question 2)  No (complete the following (PRC 21065 and 14 CCR 15378)):

Explain why Agreement is not considered a "Project":

Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because .

2. If Agreement is considered a "Project" under CEQA:

a) Agreement **IS** exempt. (Attach draft NOE)

Statutory Exemption. List PRC and/or CCR section number:

Categorical Exemption. List CCR Cal. Code Regs., tit. 14, §15306

section number:

Common Sense Exemption. 14 CCR 15061 (b) (3)

Explain reason why Agreement is exempt under the above section:

Cal. Code Regs, tit. 14, sec. 15306 provides that projects which consist of basic data collection, research and resource evaluation activities which do not result in a serious or major disturbance to an environmental resource are categorically exempt from the provisions of CEQA. This project involves activities of education and information gathering through an electric vehicle (EV) ombudsman, training, workshops, meetings on EV charging station (EVCS) permitting, and establishing an index of potential EVCS site locations. The project's agreement does not fund installation of EVCS and will not cause direct or foreseeable indirect physical changes to the environment. Therefore, the project falls within section 15306 and will not have a significant effect on the environment.

b) Agreement **IS NOT** exempt. (Consult with the legal office to determine next steps.)

Check all that apply

Initial Study

Environmental Impact Report

Negative Declaration

Statement of Overriding Considerations

Mitigated Negative Declaration

Legal Company Name:

Budget

Center for Climate Protection dba Telos Project

\$ 25,000

\$ 0

\$ 0

**GRANT REQUEST FORM (GRF)**



Legal Company Name:  
 Planning Directors from Sonoma County Jurisdictions  
 Sonoma Clean Power

Funding Source	Funding Year of Appropriation	Budget List No.	Amount
ARFVTP	15/16	601.118H	\$300,000
Funding Source			\$
R&D Program Area:	Select Program Area		\$300,000
Explanation for "Other" selection			
Reimbursement Contract #:		Federal Agreement #:	

Name:	Suzanne Smith	Name:	Lauren Casey
Address:	490 Mendocino Ave, Suit 206	Address:	490 Mendocino Ave, Suite 206
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Competitive Solicitation  
 First Come First Served Solicitation

Solicitation #: GFO-16-601

1. Exhibit A, Scope of Work	<input checked="" type="checkbox"/>	Attached
2. Exhibit B, Budget Detail	<input checked="" type="checkbox"/>	Attached
3. CEC 105, Questionnaire for Identifying Conflicts	<input checked="" type="checkbox"/>	Attached
4. Recipient Resolution	<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached
5. CEQA Documentation	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Attached

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

## Exhibit A SCOPE OF WORK

### TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2	X	Plug-in Electric Vehicle (PEV) Ombudsman/Concierge
3		Zero Emission Vehicle (ZEV) Awareness and Implementation of Fuel Shift Plan
4		Coordination and Technical Assistance for Electric Vehicle Charging Station (EVCS) Permitting
5		EVCS Siting Analysis Refinement and Online Database
6		Data Collection and Analysis

### KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	RCPA Staff		
2	RCPA Staff	Center for Climate Protection	
3	RCPA Staff		
4	RCPA Staff		Planning Directors from Sonoma County Jurisdictions
5	RCPA Staff		Sonoma Clean Power
6	RCPA Staff		

### GLOSSARY

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

Term/ Acronym	Definition
ARFVTP	Alternative and Renewable Fuel and Vehicle Technology Program
BEV	Battery Electric Vehicle, these vehicles run exclusively on electricity via on-board batteries that are charged by plugging into an outlet or charging station. There is no gasoline engine.
BCE	Business for Clean Energy (Center for Climate Protection Program)
CAM	Commission Agreement Manager
CCP	Center for Climate Protection
CPR	Critical Project Review
CAO	Commission Agreement Officer

<b>Term/ Acronym</b>	<b>Definition</b>
EVCS	Electric Vehicle Charging Station
EVSE	Electric Vehicle Service Equipment
FTD	Fuels and Transportation Division
ICE	Internal Combustion Engine
PEV	Plug-in Electric Vehicle (including BEVs and PHEVs)
PHEV	Plug-In Hybrid Electric Vehicle, has both an electric motor and internal combustion engine, PHEV batteries can be charged by plugging into an outlet
PRMD	Sonoma County Permit and Resource Management Department
RCPA	Sonoma County Regional Climate Protection Authority (GFO-16-601, Recipient)
SCP	Sonoma Clean Power (a community choice energy provider)
SCTA	Sonoma County Transportation Authority
ZEV	Zero Emission Vehicle

**Background:**

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

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

- Reduce California’s use and dependence on petroleum transportation fuels and increase the use of alternative and renewable fuels and advanced vehicle technologies.
- Produce sustainable alternative and renewable low-carbon fuels in California.
- Expand alternative fueling infrastructure and fueling stations.
- Improve the efficiency, performance and market viability of alternative light-, medium-, and heavy-duty vehicle technologies.
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets to alternative technologies or fuel use.
- Expand the alternative fueling infrastructure available to existing fleets, public transit, and transportation corridors.
- Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

On October 17, 2016, the California Energy Commission (Energy Commission) released a Grant Solicitation and Application Package entitled “Zero Emission Vehicle (ZEV) Regional Readiness and Planning Solicitation” under the ARFVTP. This first-come, first-served grant

solicitation was an offer to fund projects that support new and existing planning efforts for zero-emission vehicles (battery-electric vehicles and hydrogen fuel cell electric vehicles, and including plug-in hybrid electric vehicles). In response to GFO-16-601, the Recipient submitted application #6 which was proposed for funding in the Energy Commission's Notice of Proposed Awards on January 12, 2017. GFO-16-601 and Recipient's application are hereby incorporated by reference into this Agreement in their entirety.

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

**Problem Statement:**

The requested funding for activities in this grant will address two market barriers. The first is a lack of consumer information that leads to inaction or the purchase of non plug-in electric Vehicles (PEVs) when a PEV would be suitable. This has not been addressed because the technology is relatively new and car dealerships find it easier to steer consumers towards more familiar gas cars. The second market barrier is a lack of awareness where public electric vehicle charging stations (EVCS) will need to be installed and the best specific locations for new installations. This has not been fully addressed because private companies and public utilities are reluctant to share their siting analysis and may not incorporate information from government travel models to refine forecasted needs.

The activities will also address two institutional barriers. The first is a lack of clarity at the local government staff level about what actions can be taken and which actions will be most effective. This has not been addressed due to a shortage of capacity at most levels of local government and a scarcity of established best practices for a new technology. The second institutional barrier is a lack of preparedness to efficiently process an anticipated jump in residential EVCS permit requests. This has not been addressed due to limited permitting staff and lack of awareness of best practices for streamlining the EVCS permitting.

**Goals of the Agreement:**

The goal of this Agreement is to provide needed resources and support to consumers and local government staff to accelerate electric vehicle adoption in Sonoma County. Building upon existing partnerships in Sonoma County, the project will advance PEV adoption within the region through four key objectives that will provide needed market information and institutional support.

**Objectives of the Agreement:**

The objectives of this Agreement are to 1) Establish an electric vehicle concierge service and develop the knowledge and ability to respond to 100 queries a month; 2) Conduct government and employer training on key actions to promote PEVs in Sonoma County for government staff in all local jurisdictions and with local employers; 3) Provide technical assistance and coordination to streamline permitting for EVCS in jurisdictions representing over 50% of car sales in Sonoma County; and 4) Publish an index of ranked sites that show the highest potential for future EVCS installations, including site visits to the top 20 locations.

## **TASK 1 ADMINISTRATION**

### **Task 1.1 Attend Kick-off Meeting**

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement. The Commission Agreement Manager (CAM) shall designate the date and location of this meeting and provide an agenda to the Recipient prior to the meeting.

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

- Attend a “Kick-Off” meeting with the CAM, the Commission Agreement Officer (CAO), and a representative of the Energy Commission Accounting Office. The Recipient shall bring their Project Manager, Agreement Administrator, Accounting Officer, and any others determined necessary by the Recipient or specifically requested by the CAM to this meeting.
- Discuss the following administrative and technical aspects of this Agreement:
  - Agreement Terms and Conditions
  - Critical Project Review (Task 1.2)
  - Match fund documentation (Task 1.6) No reimbursable work may be done until this documentation is in place.
  - Permit documentation (Task 1.7)
  - Subcontracts needed to carry out project (Task 1.8)
  - The CAM's expectations for accomplishing tasks described in the Scope of Work
  - An updated Schedule of Products and Due Dates
  - Monthly Progress Reports (Task 1.4)
  - Technical Products (Product Guidelines located in Section 5 of the Terms and Conditions)
  - Final Report (Task 1.5)

#### **Recipient Products:**

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

#### **Commission Agreement Manager Product:**

- Kick-Off Meeting Agenda

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

CPRs provide the opportunity for frank discussions between the Energy Commission and the Recipient. The goal of this task is to determine if the project should continue to receive Energy Commission funding to complete this Agreement and to identify any needed modifications to the tasks, products, schedule or budget.

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

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

**The CAM shall:**

- Determine the location, date, and time of each CPR meeting with the Recipient. These meetings generally take place at the Energy Commission, but they may take place at another location.
- Send the Recipient the agenda and a list of expected participants in advance of each CPR. If applicable, the agenda shall include a discussion on both match funding and permits.
- Conduct and make a record of each CPR meeting. Prepare a schedule for providing the written determination described below.
- Determine whether to continue the project, and if continuing, whether or not modifications are needed to the tasks, schedule, products, and/or budget for the remainder of the Agreement. Modifications to the Agreement may require a formal amendment (please see section 8 of the Terms and Conditions). If the CAM concludes that satisfactory progress is not being made, this conclusion will be referred to the Lead Commissioner for Transportation for his or her concurrence.
- Provide the Recipient with a written determination in accordance with the schedule. The written response may include a requirement for the Recipient to revise one or more product(s) that were included in the CPR.

**The Recipient shall:**

- Prepare a CPR Report for each CPR that discusses the progress of the Agreement toward achieving its goals and objectives. This report shall include recommendations and conclusions regarding continued work of the projects. This report shall be submitted along with any other products identified in this scope of work. The Recipient shall submit these documents to the CAM and any other designated reviewers at least 15 working days in advance of each CPR meeting.
- Present the required information at each CPR meeting and participate in a discussion about the Agreement.

**CAM Products:**

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

**Recipient Product:**

- CPR Report(s)

**Task 1.3 Final Meeting**

The goal of this task is to closeout this Agreement.

**The Recipient shall:**

- Meet with Energy Commission staff to present the findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement.

This meeting will be attended by, at a minimum, the Recipient, the Commission Grants Office Officer, and the Commission Agreement Manager. The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be two separate meetings at the discretion of the Commission Agreement Manager.

The technical portion of the meeting shall present an assessment of the degree to which project and task goals and objectives were achieved, findings, conclusions, recommended next steps (if any) for the Agreement, and recommendations for improvements. The Commission Agreement Manager will determine the appropriate meeting participants.

The administrative portion of the meeting shall be a discussion with the Commission Agreement Manager and the Grants Officer about the following Agreement closeout items:

- What to do with any equipment purchased with Energy Commission funds (Options)
  - Energy Commission's request for specific "generated" data (not already provided in Agreement products)
  - Need to document Recipient's disclosure of "subject inventions" developed under the Agreement
  - "Surviving" Agreement provisions
  - Final invoicing and release of retention
- Prepare a schedule for completing the closeout activities for this Agreement.

**Products:**

- Written documentation of meeting agreements
- Schedule for completing closeout activities

**Task 1.4 Monthly Progress Reports**

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement on time and within budget.

The objectives of this task are to summarize activities performed during the reporting period, to identify activities planned for the next reporting period, to identify issues that may affect performance and expenditures, and to form the basis for determining whether invoices are consistent with work performed.

**The Recipient shall:**

- Prepare a Monthly Progress Report which summarizes all Agreement activities conducted by the Recipient for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due to the Commission Agreement Manager within 10 days of the end of the reporting period. The recommended specifications for each progress report are contained in Section 6 of the Terms and Conditions of this Agreement.
- In the first Monthly Progress Report and first invoice, document and verify match expenditures and provide a synopsis of project progress, if match funds have been expended or if work funded with match share has occurred after the notice of proposed award but before execution of the grant agreement. If no match funds have been expended or if no work funded with match share has occurred before execution, then state this in the report. All pre-execution match expenditures must conform to the requirements in the Terms and Conditions of this Agreement.

**Product:**

- Monthly Progress Reports

**Task 1.5 Final Report**

The goal of the Final Report is to assess the project's success in achieving the Agreement's goals and objectives, advancing science and technology, and providing energy-related and other benefits to California.

The objectives of the Final Report are to clearly and completely describe the project's purpose, approach, activities performed, results, and advancements in science and technology; to present a public assessment of the success of the project as measured by the degree to which goals and objectives were achieved; to make insightful observations based on results obtained; to draw conclusions; and to make recommendations for further projects and improvements to the FTD project management processes.

The Final Report shall be a public document. If the Recipient has obtained confidential status from the Energy Commission and will be preparing a confidential version of the Final Report as well, the Recipient shall perform the following activities for both the public and confidential versions of the Final Report.

**The Recipient shall:**

- Prepare an Outline of the Final Report, if requested by the CAM.
- Prepare a Final Report following the latest version of the Final Report guidelines which will be provided by the CAM. The CAM shall provide written comments on the Draft Final Report within fifteen (15) working days of receipt. The Final Report must be completed at least 60 days before the end of the Agreement Term.
- Submit one bound copy of the Final Report with the final invoice.

**Products:**

- Outline of the Final Report, if requested
- Draft Final Report

- Final Report

### **Task 1.6 Identify and Obtain Matching Funds**

The goal of this task is to ensure that the match funds planned for this Agreement are obtained for and applied to this Agreement during the term of this Agreement.

The costs to obtain and document match fund commitments are not reimbursable through this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient may utilize match funds for this task. Match funds shall be spent concurrently or in advance of Energy Commission funds for each task during the term of this Agreement. Match funds must be identified in writing and the associated commitments obtained before the Recipient can incur any costs for which the Recipient will request reimbursement.

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

- Prepare a letter documenting the match funding committed to this Agreement and submit it to the Commission Agreement Manager at least 2 working days prior to the kick-off meeting. If no match funds were part of the proposal that led to the Energy Commission awarding this Agreement and none have been identified at the time this Agreement starts, then state such in the letter. If match funds were a part of the proposal that led to the Energy Commission awarding this Agreement, then provide in the letter a list of the match funds that identifies the:
  - Amount of each cash match fund, its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied.
  - Amount of each in-kind contribution, a description, documented market or book value, and its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient shall identify its owner and provide a contact name, address and telephone number, and the address where the property is located.
- Provide a copy of the letter of commitment from an authorized representative of each source of cash match funding or in-kind contributions that these funds or contributions have been secured. For match funds provided by a grant a copy of the executed grant shall be submitted in place of a letter of commitment.
- Discuss match funds and the implications to the Agreement if they are reduced or not obtained as committed, at the kick-off meeting. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide the appropriate information to the Commission Agreement Manager if during the course of the Agreement additional match funds are received.
- Notify the Commission Agreement Manager within 10 days if during the course of the Agreement existing match funds are reduced. Reduction in match funds must be approved through a formal amendment to the Agreement and may trigger an additional CPR meeting.

**Products:**

- A letter regarding match funds or stating that no match funds are provided
- Copy(ies) of each match fund commitment letter(s) (if applicable)
- Letter(s) for new match funds (if applicable)
- Letter that match funds were reduced (if applicable)

**Task 1.7 Identify and Obtain Required Permits**

The goal of this task is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track.

Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient shall budget match funds for any expected expenditures associated with obtaining permits. Permits must be identified in writing and obtained before the Recipient can make any expenditure for which a permit is required.

**The Recipient shall:**

- Prepare a letter documenting the permits required to conduct this Agreement and submit it to the Commission Agreement Manager at least 2 working days prior to the kick-off meeting. If there are no permits required at the start of this Agreement, then state such in the letter. If it is known at the beginning of the Agreement that permits will be required during the course of the Agreement, provide in the letter:
  - A list of the permits that identifies the:
    - Type of permit
    - Name, address and telephone number of the permitting jurisdictions or lead agencies
  - The schedule the Recipient will follow in applying for and obtaining these permits.
- Discuss the list of permits and the schedule for obtaining them at the kick-off meeting and develop a timetable for submitting the updated list, schedule and the copies of the permits. The implications to the Agreement if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in the Progress Reports and will be a topic at CPR meetings.
- If during the course of the Agreement additional permits become necessary, provide the appropriate information on each permit and an updated schedule to the Commission Agreement Manager.
- As permits are obtained, send a copy of each approved permit to the Commission Agreement Manager.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the Commission Agreement Manager within 5 working days. Either of these events may trigger an additional CPR.

**Products:**

- Letter documenting the permits or stating that no permits are required
- A copy of each approved permit (if applicable)
- Updated list of permits as they change during the term of the Agreement (if applicable)
- Updated schedule for acquiring permits as changes occur during the term of the Agreement (if applicable)
- A copy of each final approved permit (if applicable)

**Task 1.8 Obtain and Execute Subcontracts**

The goal of this task is to ensure quality products and to procure subcontractors required to carry out the tasks under this Agreement consistent with the Agreement Terms and Conditions and the Recipient’s own procurement policies and procedures. It will also provide the Energy Commission an opportunity to review the subcontracts to ensure that the tasks are consistent with this Agreement, and that the budgeted expenditures are reasonable and consistent with applicable cost principles.

**The Recipient shall:**

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

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

**TECHNICAL TASKS**

Pursuant to Exhibit D, if any information under this Agreement is “Personal Information” as defined under the Information Practices Act (see California Civil Code section 1798.3(a) and Exhibit D section 3 of this Agreement for the definition of “Personal Information”) then Recipient and any subcontractor or partner who collects or otherwise has access to the Personal Information must comply with the Information Practices Act (California Civil Code sections 1798 et seq.) when performing activities under this Agreement.

## **TASK 2 EV OMBUDSMAN AND CONCIERGE**

### **Task 2.1 Provide PEV Ombudsman and Concierge Service**

The goal of this task is to provide a PEV concierge service in Sonoma County to serve as a one-stop-shop for consumers to get information from a neutral third-party.

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

- Provide a PEV ombudsman service in Sonoma County for 2 years
- Be available to the public Monday through Friday through a call-in line and online chat option, and 24 hours per day and 7 days per week service through an online form and knowledge base. The ombudsman will also participate in public events to answer questions from the public. Information provided will include, but not be limited to:
  - The total cost of ownership of a PEV and charging station
  - Locations of the nearest charging stations
  - Information on current and future vehicle models
  - The benefits and limitations of plug-in hybrid electric vehicles (PHEVs) vs. battery electric vehicles (BEVs)
  - An overview of options for purchasing or leasing
  - Information on new versus used EVs
  - Assistance understanding and applying for federal, state and local tax incentives and rebates
  - Links to certified contractors who can install charging infrastructure
- Conduct a customer satisfaction survey to track user needs and improve quality of service during the grant period. This follow-up satisfaction survey will be sent to at least 25% of users. Complete a Satisfaction Survey Report detailing and analyzing the results of the customer satisfaction surveys.
- Produce Monthly PEV Ombudsman Service Report which tracks key metrics including, but not limited to: volume of questions, question categories, responses, and timeliness of response
- Produce report on queries and responses by category
- Work to establish a partnership with local utilities and agencies to fund the ombudsman on an annual basis after the end date of the agreement.

#### **Products:**

- Monthly PEV Ombudsman Service Report
- Marketing materials and examples of digital collateral for the PEV ombudsman service
- Report on queries and responses by category
- Satisfaction Survey Report

## **Task 2.2 Create an EV Knowledge Base**

The goal of this task is to provide a knowledge base to support the ombudsman with comprehensive PEV knowledge, and to make this knowledge base accessible online for project stakeholders and the public.

### **The Recipient Shall:**

- Create a knowledge base to be hosted on a new Sonoma County PEV website. The knowledge base will support the ombudsman with 24 hour per day and 7 days per week service for comprehensive information on meeting PEV needs in Sonoma County.
- Create a website to host the PEV knowledge base which addresses and tracks countywide progress in accelerating PEV adoption. The site will use a common public-facing brand for all stakeholders and projects funded by the grant.

### **Products:**

- PEV Knowledge Base Documentation for Sonoma County
- URL to Public-facing PEV website

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

## **TASK 3 ZEV AWARENESS AND IMPLEMENTATION OF FUEL SHIFT PLAN**

### **Task 3.1 Local Government ZEV Awareness and Implementation of Fuel Shift Plan**

The goal of this task is to provide comprehensive information to local government staff on local and regional PEV planning in order to accelerate the deployment of EVCS infrastructure in Sonoma County.

### **The Recipient shall:**

- Provide one workshop with local jurisdiction staff on implementing the *Fuel Shift Plan*
- Conduct follow-up meetings using content tailored to each jurisdiction in Sonoma County (10 meetings total which includes 9 cities plus the County of Sonoma, the total number of meetings can be changed with prior CAM written approval). Content will include, but not be limited to: customized presentations and in-person planning/implementation sessions related to implementing existing plans and best practices.
- Produce a Local Government PEV Actions Interim Report on actions underway and actions completed by each of the 10 jurisdictions.
- Produce a Local Government PEV Actions Final Report on actions underway and actions completed by each of the 10 jurisdictions.

### **Products:**

- Jurisdiction workshop agenda and materials
- Local Government PEV Actions Interim Report
- Local Government PEV Actions Final Report

### **Task 3.2 Workplace ZEV Awareness**

The goal of this task is to provide comprehensive information to local government staff on local and regional PEV planning; and to provide information and inspiration to local employers in order to accelerate the deployment of EVCS infrastructure in Sonoma County workplaces.

**The Recipient shall:**

- Conduct one workshop to accelerate workplace charging in Sonoma County through existing business networks, such as the Business for Clean Energy network coordinated by the Center for Climate Protection.
- Conduct at least 10 consultations to plan for new workplace EVCS with local employers in the first year of the program (the total number of consultations can be changed with prior CAM written approval).
- Conduct final survey of engaged local employers on actions taken to expand workplace charging
- Produce a Workplace Charging Interim Report on new workplace charging infrastructure installed by all local employers engaged through the program as well as a summary of additional actions taken
- Produce a Workplace Charging Final Report on new workplace charging infrastructure installed by all local employers engaged through the program as well as a summary of additional actions taken

**Products:**

- Local employer workshop agenda and materials
- Workplace Charging Interim Report
- Workplace Charging Final Report

**TASK 4 COORDINATION AND TECHNICAL ASSISTANCE FOR EVCS PERMITTING**

**Task 4.1 Update Current EVCS Guidelines**

The goal of this task is to update current EV charging station program and installation guidelines with relevant local entities in Sonoma County.

**The Recipient shall:**

- Produce a mark-up draft of the 2011 Electric Vehicle Charging Station Program and Installation Guidelines in coordination with the Sonoma County Permit and Resource Management Department (PRMD)
- Assist in updating the EVCS installation guidelines at the County of Sonoma and the City of Santa Rosa
- Work with PRMD to support their adoption and use of updated EVCS Installation Guidelines. The team will investigate similar work with Santa Rosa and other interested jurisdictions

**Products:**

- Mark-up draft of the 2011 Electric Vehicle Charging Station Program and Installation Guidelines

- Agendas and materials from meetings with each jurisdiction to review updated guidelines

#### **Task 4.2 Support Streamlined Permitting**

The goal of this task is to support efforts to streamline permitting processes with relevant local entities in Sonoma County.

##### **The Recipient Shall:**

- Provide ongoing support, regional coordination and on-call assistance for local permitting offices to upgrade their permitting processes
- Provide on-call technical assistance for local government staff related to permitting EVCS
- Coordinate round-tables with permitting staff from multiple jurisdictions to develop best practices in permit streamlining.
- Produce an Interim Best Practices in Permit Streamlining Report
- Produce a Final Best Practices in Permit Streamlining Report

##### **Products:**

- Interim Best Practices in Permit Streamlining Report
- Final Best Practices in Permit Streamlining Report
- Agendas and materials from meetings with each jurisdiction to review permitting process

### **TASK 5 EVCS SITING ANALYSIS REFINEMENT AND ONLINE DATABASE**

#### **Task 5.1 Refine Existing EVCS Siting Analysis**

The goal of this task is to create a detailed index of specific sites that show the most potential for future EVCS locations in Sonoma County.

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

- Conduct one public workshop targeting retail businesses and owners of parking in projected high-demand areas for EVCS, plus local PEV enthusiasts (such as the North Bay Electric Auto Association), to receive specific site input
- Publish an online mapping tool to solicit local input on specific charging locations in each jurisdiction in order to meet 2030 charging needs outlined in the Sonoma County *Fuel Shift Plan*
- Review utility considerations with Sonoma Clean Power staff
- Perform site visits to the top 20 sites ranked in Sonoma County (with at least one per jurisdiction); photograph location and reach out to property owners for input
- Conduct 3 public workshops to review EVCS siting information with stakeholders
- Meet with and consult local governments (10 jurisdictions) to review and provide input on specific siting recommendations

##### **Products:**

- Draft EVCS Sites List and Map
- Public workshop agendas and materials
- Local government consultations agendas and materials
- Final EVCS Sites List and Map

### **Task 5.2 Create an Online Database**

The goal of this task is to make the location of potential high-demand EVCS sites available to the general public, stakeholders and employers.

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

- Publish location data through an online tool to provide visibility and up-to-date information on public EVCS installations
- Create an online map with draft locations of potential public EVCS sites
- Produce an updated list of sites with ranking based on stakeholder input
- Produce an interim online EVCS map
- Produce a final online EVCS map

#### **Products:**

- Interim online EVCS map
- Final online EVCS map

### **Task 6 DATA COLLECTION AND ANALYSIS**

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

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

- Develop data collection test plan
- Troubleshoot any issues identified
- Collect data on the following, but not limited to:
  - Statistics on monthly inquires for ombudsman and concierge service
  - Statistics on web traffic to knowledge base
  - How many permits issued under new streamlined permitting process
    1. Estimated time savings
    2. Estimated cost savings
  - Specific jobs and economic development resulting from this project
  - Estimated the number of EVSE ports that are expected to result from readiness plan
  - Estimated gallons of gasoline and/or diesel fuel displaced (with estimated associated mileage information)

- Expected air emissions reduction
- Expected displacement of gallons of gasoline/diesel
- Expected displacement of ICE mileage
- Identify any current and planned use of renewable energy
- Identify the source of the alternative fuel
- Describe any energy efficiency measures used in the facility that may exceed Title 24 standards in Part 6 of the California Code Regulations
- Provide data on potential job creation, economic development, and increased state revenue as a result of expected future expansion
- Provide a quantified estimate of the project's carbon intensity values for life-cycle greenhouse gas emissions.
- Compare any project performance and expectations provided in the proposal to Energy Commission with actual project performance and accomplishments.
- Collect data, information, and analysis described above and include in the Final Report.

**Products:**

- Data collection information and analysis will be included in the Final Report

STATE OF CALIFORNIA

STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: SONOMA COUNTY REGIONAL CLIMATE PROTECTION  
AUTHORITY

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

**RESOLVED**, that the Energy Commission approves Agreement ARV-16-013 from GFO-16-601 with Sonoma County Regional Climate Protection Authority for a \$300,000 grant to provide needed resources and support to consumers, and local government staff to accelerate electric vehicle (EV) adoption in Sonoma County by establishing EV concierge services, training, streamline permitting, and survey future EV charging system installation sites; and

**FURTHER BE IT RESOLVED**, that the Executive Director or his/her designee shall execute the same on behalf of the Energy Commission.

**CERTIFICATION**

The undersigned Secretariat to the Commission does hereby certify that the foregoing is a full, true, and correct copy of a Resolution duly and regularly adopted at a meeting of the California Energy Commission held on March 8, 2017.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

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Cody Goldthrite,  
Secretariat