



STATE OF CALIFORNIA

**GRANT REQUEST FORM (GRF)**

CEC-270 (Revised 12/2019)

CALIFORNIA ENERGY COMMISSION

**A) New Agreement # ARV-21-011 (to be completed by CGL office)**

<b>B) Division</b>	<b>Agreement Manager:</b>	<b>MS-</b>	<b>Phone</b>
600 Fuels and Transportation Division	Ian Baird	27	916-805-7480

<b>C) Recipient's Legal Name</b>	<b>Federal ID #</b>
United Natural Foods, Inc.	05-0376157

<b>D) Title of Project</b>
United Natural Foods, Inc. California Food Logistics System Electrification Blueprint

**E) Term and Amount**

<b>Start Date</b>	<b>End Date</b>	<b>Amount</b>
07 / 15 / 2021	06 / 30 / 2022	\$ 200,000

**F) Business Meeting Information**

☐ ARFVTP agreements \$75K and under delegated to Executive Director

Proposed Business Meeting Date 07 / 15 / 2021 ☐ Consent ☒ Discussion

Business Meeting Presenter Katie Reid Time Needed: 5 minutes

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

**Agenda Item Subject and Description:**

UNITED NATURAL FOODS, INC. Proposed resolution approving Agreement ARV-21-011 with United Natural Foods, Inc. for a \$200,000 grant to develop a planning "blueprint" to accelerate the deployment of zero-emission vehicles and related infrastructure to decarbonize the company's logistics chain, advance science-based sustainability targets, and to promote technological replicability, and adopting staff's determination that this action is exempt from CEQA. (Clean Transportation Program Funding.) Contact: Ian Baird. (Staff Presentation: 5 minutes)

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

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

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

Explain why Agreement is not considered a "Project":

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

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

a) ☐ Agreement **IS** exempt.

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

☒ Categorical Exemption. List CCR section number: Cal. Code Regs., tit. 14, § 15306, Information Collection, 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 consists of developing a planning document for possible, future deployment of zero emission vehicles and related infrastructure equipment. The project will not cause direct physical changes to the environment, and there will be no physical destruction. This project involves data collection, technology



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assessment, public outreach, administrative coordination efforts, planning, and similar activities. Therefore, the proposed project will have no significant effect on the environment and is categorically exempt under section 15306.

☐ Common Sense Exemption. 14 CCR 15061 (b) (3) Explain reason why Agreement is exempt under the above section:

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

Check all that apply

- ☐ Initial Study  
☐ Negative Declaration  
☐ Mitigated Negative Declaration  
☐ Environmental Impact Report  
☐ Statement of Overriding Considerations

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

Legal Company Name:	Budget
The Electric Vehicle Alliance	\$ 95,000
Build Momentum	\$ 95,000
	\$ 0.00

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

Legal Company Name:

**J) Budget Information**

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
ARFVTP	FY 19/20	601.118L	\$200,000
Funding Source			\$
Funding Source			\$
Funding Source			\$
Funding Source			\$

R&D Program Area: Select Program Area TOTAL: \$

Explanation for "Other" selection

Reimbursement Contract #:

Federal Agreement #:



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## K) Recipient's Contact Information

### 1. Recipient's Administrator/Officer

Name: Daele Mather

Address: 801 K Street, Suite 2700

City, State, Zip: Sacramento, CA,  
95814

Phone: (916) 545-7801

E-Mail: daele@buildmomentum.io

### 2. Recipient's Project Manager

Name: Nathaniel Lapidés

Address: 313 Iron Horse Way

City, State, Zip: Providence, RI,  
02908

Phone: (401) 528-8634 ext. 32978

E-Mail: nlapides@unfi.com

## L) Selection Process Used

- ☒ Competitive Solicitation      Solicitation #: GFO-20-601  
☐ First Come First Served Solicitation Solicitation #: - -

## M) The following items should be attached to this GRF

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

*San J. Baird*

Agreement Manager

06-21-2021

Date

*Elizabeth John*

Office Manager

6/21/2021

Date

*John Butler II*

Deputy Director

06/21/2021

Date

## Exhibit A SCOPE OF WORK

### TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2	X	Community and Stakeholder Engagement
3		Blueprint Development
4		Project Fact Sheet
5		Blueprint Production

### KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Nate Lapides (UNFI)	Build Momentum (Momentum), EV Alliance	
2	Nate Lapides (UNFI)	Momentum, EV Alliance, Climate Collaborative	
3	Nate Lapides (UNFI)	Momentum, EV Alliance, Schneider Electric	
4	Nate Lapides (UNFI)	Momentum, EV Alliance, Climate Collaborative	
5	Nate Lapides (UNFI)	Momentum, EV Alliance	

### GLOSSARY

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

Term/ Acronym	Definition
AHJ	Authority Having Jurisdiction
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CBO	Community-Based Organization
CEC	California Energy Commission
Clean Transportation Program	Formerly known as the Alternative and Renewable Fuel and Vehicle Technology Program
CPR	Critical Project Review
EV	Electric Vehicle
FAC	Financial Advisory Council
FTD	Fuels and Transportation Division
MD/HD	Medium- and Heavy-Duty

<b>Term/ Acronym</b>	<b>Definition</b>
Recipient	United Natural Foods, Inc.
TAC	Technical Advisory Council
UNFI	United Natural Foods, Inc.
ZEV	Zero-Emission Vehicle. (This may include on- and off-road vehicles, equipment, and harbor craft.)

## **BACKGROUND**

Assembly Bill (AB) 118 (Núñez, Chapter 750, Statutes of 2007), created the Clean Transportation Program (formerly known as the Alternative and Renewable Fuel and Vehicle Technology Program). The statute authorizes the California Energy Commission (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-authorizes the Program through January 1, 2024, and specifies 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.

The CEC issued GFO-20-601 entitled "Blueprints for Medium- and Heavy-Duty Zero-Emission Vehicle Infrastructure" under the CEC's Clean Transportation Program. To be eligible for funding under GFO-20-601, projects must also be consistent with the CEC's current Clean Transportation Program Investment Plan, updated annually. In response to GFO-20-601, the Recipient submitted Proposal #45 which was proposed for funding in the CEC's Notice of Proposed Awards on April 8, 2021. GFO-20-601 is 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. Similarly, in the event of any conflict or inconsistency between the terms of this Agreement and the terms of the Recipient's Application, the terms of this Agreement shall control.

## **Problem Statement**

The MD/HD ZEV market is nascent but growing quickly. However, product availability is just the beginning of the challenge for electrification. To accelerate MD/HD ZEV fleet adoption in California and beyond, fleet operators positioned at the center of larger supply chains in key industries must become high-visibility pioneers and catalysts for broader transportation electrification across their ecosystem of influence, inclusive of key customers, suppliers, and logistics partners. As the largest distributor of natural foods in the western United States, and one of the largest food distributors in the nation, United Natural Foods, Inc. (UNFI) is uniquely positioned to lead electrification planning and deployment within California's food distribution ecosystem.

The UNFI Blueprint will strategically and systematically gather information, data, and insights to inform decision-making that will facilitate ZEV-related capital investment, partnership development, and infrastructure deployment. Specifically, UNFI's Blueprint development process will:

- Foster productive dialogue, planning, and action across UNFI's diverse stakeholder group, bringing together internal company areas of expertise across departmental siloes to harvest information and ideas from UNFI's diverse customers, logistics and technology providers, sustainability coalition partners, community leaders, and public agencies.
- Identify barriers for early adopters that can be solved with technical innovations – such as solar-enabled refrigeration trucks and complementary solar microgrids to ensure food preservation and electric truck reliability despite increasingly frequent grid outages.
- Create replicable and scalable processes for deploying capital that support accelerated electrification and minimize investment risk.
- Plan and identify siting requirements and opportunities to ensure charging access for users of intermodal rail to truck transfer facilities (where feasible and appropriate).
- Identify and quantify the business case and environmental benefits of MD/HD ZEV adoption.

## **Goal of the Agreement:**

UNFI's overarching goal is to accelerate the deployment of ZEVs and related infrastructure to decarbonize its logistics chain, advance science-based sustainability targets, and support partners to do the same.

## **Objectives of the Agreement:**

With a focus on quantitative and measurable results, UNFI has identified the following objectives:

- Engage internal and external stakeholders to develop a comprehensive and economic approach to rapidly deploying MD/HD ZEV infrastructure.

- Define internal and third-party fleet operator and driver needs to identify critical performance specifications that are critical to meet UNFI, customer, and logistics partner needs.
- Identify workforce education and training resources to prepare maintenance technicians for MD/HD ZEVs.
- Advance facility site design to vet the design process and identify real-world operability considerations given existing utilization.
- Develop a phased approach to infrastructure deployment that maintains flexibility to react to changes to a nascent market with rapidly evolving technology.
- Map the ecosystem of strategic partners and business model innovations supported by ZEV market adoption.

## **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 CEC 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

**CAM Product:**

- Kick-Off Meeting Agenda

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

CPRs provide the opportunity for frank discussions between the CEC and the Recipient. The goal of this task is to determine if the project should continue to receive CEC 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 CAO, the Fuels and Transportation Division (FTD) program lead, other CEC staff and Management as well as other individuals selected by the CAM to provide support to the CEC.

**The CAM shall:**

- Determine the location, date, and time of each CPR meeting with the Recipient. These meetings generally take place at the CEC, but they may take place at another location or remotely.
- 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 CEC staff to present the findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement.

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

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

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

- What to do with any equipment purchased with CEC funds (Options)
- CEC 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 CAM within 10 days of the end of the reporting period. The recommended specifications for each progress report are contained in Section 6 of the Terms and Conditions of this Agreement.
- In the first Monthly Progress Report and first invoice, document and verify match expenditures and provide a synopsis of project progress, if match funds have been expended or if work funded with match share has occurred after the notice of proposed award but before execution of the grant agreement. If no match funds have been expended or if no work funded with match share has occurred before execution, then state this in the report. All pre-execution match expenditures must conform to the requirements in the Terms and Conditions of this Agreement.

**Product:**

- Monthly Progress Reports

**Task 1.5 Final Report**

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

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

The Final Report shall be a public document. If the Recipient has obtained confidential status from the CEC 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 CEC 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 CEC 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 CAM at least 2 working days prior to the kick-off meeting. If no match funds were part of the proposal that led to the CEC 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 CEC awarding this Agreement, then provide in the letter a list of the match funds that identifies the:
  - Amount of each cash match fund, its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied.
  - Amount of each in-kind contribution, a description, documented market or book value, and its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient shall identify its owner and provide a contact name, address and telephone number, and the address where the property is located.
- Provide a copy of the letter of commitment from an authorized representative of each source of cash match funding or in-kind contributions that these funds or contributions have been secured. For match funds provided by a grant a copy of the executed grant shall be submitted in place of a letter of commitment.
- Discuss match funds and the implications to the Agreement if they are reduced or not obtained as committed, at the kick-off meeting. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide the appropriate information to the CAM if during the course of the Agreement additional match funds are received.

- Notify the CAM within 10 days if during the course of the Agreement existing match funds are reduced. Reduction in match funds must be approved through a formal amendment to the Agreement and may trigger an additional CPR meeting.

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

- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM within 5 working days. Either of these events may trigger an additional CPR.

**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 CEC an opportunity to review the subcontracts to ensure that the tasks are consistent with this Agreement, and that the budgeted expenditures are reasonable and consistent with applicable cost principles.

**The Recipient shall:**

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

**Products:**

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

**TECHNICAL TASKS**

**TASK 2 COMMUNITY AND STAKEHOLDER ENGAGEMENT**

The overarching goal of this task is to bring together industry participants, stakeholders, and advocates to foster productive dialogue and action to advance the deployment of MD/HD ZEV infrastructure and vehicles.

**Task 2.1 Community and Stakeholder Engagement Plan**

The goal of this task is to develop a Community Stakeholder Engagement Plan to identify the purpose of project team engagement with communities and stakeholders and the goals and intended outcomes of the outreach by stakeholder segment. The plan will highlight an outreach and engagement strategy tailored to local communities, supported by the creation of education and outreach materials appropriate for residents, in the languages needed for the community. The Blueprint outreach strategy will be tailored to UNFI served communities where electric vehicles and infrastructure will be deployed. The final work product will highlight how the project team will engage stakeholders -- including local governments, utilities, workplaces, business owners and operators, community-based organizations, community leaders, native tribes, local residents, and financial institutions.

**The Recipient shall:**

- Identify key stakeholders, both decision-making and advisory, that need to be involved in or be informed of the planning and execution of the blueprint drafting and/or analysis.
- Prepare a List of Outreach Targets to ensure a diverse stakeholder audience. Provide a copy to the CAM.
- Identify existing or near-term utility programs to support development of MD/HD ZEV infrastructure, including rebates and preferential tariffs.
- Develop topics and questions that can be used in future stakeholder and outreach meetings.
- Prepare a Community and Stakeholder Engagement Plan to identify the purpose of its engagement with communities and stakeholders and the goals and intended outcomes of the outreach by each stakeholder segment. Provide a copy to the CAM.
- Engage Electric Utilities to support grid delivery, reliability, and resiliency.
  - Engage SCE (for SoCal locations) and PG&E (for NorCal locations) to determine which incentives and rates will apply to the UNFI fleet, and how UNFI EV infrastructure can be optimized to support grid delivery, reliability, and resiliency.
  - Identify opportunities and challenges.
  - Evaluate impacts of increased charging and power utilization on utility rates.
- Engage Local Jurisdictions and Planning Organizations to ensure they are involved in the planning and permitting of the infrastructure.
  - Conduct outreach to relevant air quality management districts.
  - Conduct outreach to relevant local building departments to assess the permitting process for the installation of ZEV charging infrastructure and relevant DER technologies.
  - Document actions or steps already adopted by local, state, and federal jurisdictions and the impact of those actions or steps on the development of MD/HD ZEV infrastructure and the electrification of multimodal transportation.
  - Engage local authorities having jurisdiction (AHJ) with best-practice information related to planned EV infrastructure installations in communities with UNFI installations targeted for EV infrastructure.
- Engage regional workplaces, business owners and operators, regional community-based organizations (CBOs), community leaders, California Native American Tribes, and potentially affected local residents in the planning process and education on the benefits of ZEV transportation.
  - Engage the leading UNFI customers and partners to participate in Blueprint planning and to help provide education on ZEV benefits. Contacts should include

but are not limited to: Danone, Climate Collaborative, JB Hunt, Coyote Logistics/UPS.

- Work with CBOs, community leaders, and residents to provide education on ZEV and ZEV infrastructure benefits.
- Conduct outreach to local community leaders, CBOs, workforce institutions, and business owners or operators to develop workforce development strategies that will enable training, education, and readiness for the local community workforce to obtain the requisite knowledge, skills, and ability to develop, support, and maintain the MD/HD ZEV fleets
- Engage financial institutions to ensure they are educated, involved, and committed to participate in the implementation of the MD/HD ZEV infrastructure blueprint.
  - Financial institutions to be engaged include banks providing funding to UNFI, as well as providers/financiers of Charging-as-a-Service, such as Amply, Inc., InCharge, and others.
- Prepare a Community and Stakeholder Engagement Report including but not limited to:
  - Organizations, companies, and stakeholders that received outreach.
  - Summary of the outcomes of such outreach (e.g. engaged in dialogue, declined to participate, did not respond).
  - Overview of topics discussed.
  - Summary of the key findings aggregated by stakeholder segment.
- Provide a copy of the Community and Stakeholder Engagement Report to the CAM.

#### **Products:**

- List of Outreach Targets
- Community and Stakeholder Engagement Plan
- Community and Stakeholder Engagement Report

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

#### **Task 2.2 UNFI Best Practices Case Study and Strategic Guide**

The UNFI Blueprint strategies and initiatives will be highly replicable for other fleets and geographies. To foster replication, UNFI Blueprint team members EV Alliance and Momentum will capture all the key elements in fleet transition planning in a UNFI Best Practices in ZEV and ZEV Infrastructure Adoption Case Study and a companion Strategic Guide to Transportation Electrification and Energy Resilience in Food Distribution and Logistics.

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

- Draft a UNFI Best Practices in ZEV and ZEV Infrastructure Adoption Case Study, which will:
  - Address high-priority concerns such as charging infrastructure cost, charging management, grid integration, expected vehicle performance in specific applications, and E-fleet transition finance.
  - Include total cost of ownership (TCO) and return on investment (ROI) considerations.
  - Track UNFI's electrification planning process -- with special attention to cold supply chain requirements -- enabling replication for other fleets.

- Provide a copy of the UNFI Best Practices in ZEV and ZEV Infrastructure Adoption Case Study to the CAM.
- Draft a Strategic Guide to Transportation Electrification and Energy Resilience in Food Distribution and Logistics, which will:
  - Address key requirements for transportation electrification with a special focus on food logistics and the cold supply chain.
  - Provide guidance on both fleet electrification itself, and the complementary process of providing energy-resilient Distributed Energy Resources to power key distribution nodes, with a focus on clean and renewable resources, such as solar powered microgrids.
- Provide a copy of the Strategic Guide to Transportation Electrification and Energy Resilience in Food Distribution and Logistics to the CAM.
- Share the Case Study and Strategic Guide through the Climate Collaborative's website, social media, and survey instruments.

**Products:**

- UNFI Best Practices in ZEV and ZEV Infrastructure Adoption Case Study
- Strategic Guide to Transportation Electrification and Energy Resilience in Food Distribution and Logistics

**Task 2.3 Technical Advisory Council**

The project team will form a Technical Advisory Council (TAC) consisting of community and industry leaders with knowledge of freight logistics, transportation electrification, and related environmental issues.

**The Recipient shall:**

- Identify and invite key public agencies (e.g. South Coast Air Quality Management District) and key UNFI customers and partners (e.g. Danone, Unilever, JB Hunt, Coyote Logistics/UPS, the Climate Collaborative, and Emission Control) to participate in the TAC.
- Provide a list of TAC Members to the CAM.
- Host two TAC meetings over the course of the blueprint development and submit a summary of each TAC meeting to the CAM.
- Conduct one-on-one engagements, as needed, with TAC members. Submit a summary of each one-on-one meeting to the CAM.

**Products:**

- List of TAC Members
- TAC Meeting Summary Reports
- Summary of one-on-one meetings with TAC members

**Task 2.4 Financial Advisory Council**

The project team will engage financial institutions and partners to ensure education, involvement, and commitment to participate in Blueprint implementation. The Financial Advisory Council (FAC) is expected to review business models designed during the Blueprint process, identify financial risks and ways for the private sector to fund MD/HD ZEV infrastructure across UNFI's refueling station network.



**The Recipient shall:**

- Identify and invite financial institutions (e.g. BB&T, BMO Harris, Bank of America, CIT Bank, Citizens Bank, Fifth Third, PNC, US Bancorp, and Wells Fargo) and third-party energy-as-a-service providers (e.g. EnelX, Schneider Electric, Amply, InCharge), and other financiers (SparkFund, Hannon Armstrong) to participate in a Financial Advisory Committee (FAC).
- Provide a list of FAC Members to the CAM.
- Host two FAC meetings over the course of the Blueprint development and submit a summary of each FAC meeting to the CAM.
- Conduct one-on-one engagements, as needed, with FAC members. Submit a summary of each one-on-one meeting to the CAM.

**Products:**

- List of FAC Members
- FAC Meeting Reports
- Summary of one-on-one meetings with FAC members

**TASK 3 BLUEPRINT DEVELOPMENT**

The goal of this task is to gather the information necessary to develop a replicable and actionable Blueprint that guides future investment in MD/HD ZEV infrastructure.

**Task 3.1 MD/HD ZEV and ZEV Infrastructure Analysis and Goals**

The project team will develop quantitative goals and specific, realistic timelines and goals for installation and implementation of MD/HD electric vehicle (EV) charging and/or hydrogen refueling infrastructure within the project.

**The Recipient shall:**

- Identify MD/HD ZEV and ZEV Infrastructure Goals. Provide a copy to the CAM.
- Evaluate MD/HD vehicle usage and driving patterns in order to maximize and optimize the type and placement of ZEV infrastructure to support the MD/HD ZEVs. Summarize in a Usage Patterns Report and provide to the CAM.
- Develop EVSE Location Decision Matrix, which includes a focus on cold supply chain requirements to support lowest-carbon movement of goods and produce across California. Provide a copy to the CAM.
- Identify and map optimal locations for MD/HD ZEV infrastructure deployment and provide the rationale for being considered optimal. Include potential sites, maps, and accessibility to travel routes identified for proposed MD/HD charging and/or refueling. Summarize in a Map(s) of Optimal Locations for MD/HD Charging Infrastructure and provide to the CAM.
- Develop a high-level Microgrid Scoping Analysis for each priority facility. This analysis will include: 1) Utility bill assessment; 2) Site assessment; 3) Storage system sizing calculation and modeling to simulate performance; 4) Financing assessment and pro forma to identify relevant incentives and financing opportunities, including but not limited to the Self-Generation Incentive Program (SGIP) and other state, local, and federal programs, as well as solar PPAs, tax credits and accelerated depreciation, and other private sector financing strategies. Provide a copy to the CAM.

- Develop a software-optimized Smart Charging Assessment that defines an optimized charging strategy based on: 1) utility rates, which includes demand charges and TOU pricing; 2) rates of charge that satisfy operational needs; and 3) UNFI fleet operational needs and constraints and input from UNFI's relevant data streams. The resulting optimization will serve to goal of minimizing operational costs and electrical capacity upgrades and charging capacity requirements and be presented in a Smart Charging Assessment. Provide a copy to the CAM.
- Develop specific charging infrastructure plans for all relevant UNFI depots based on duty cycle analysis and data analyzed. Submit to the CAM.
- Develop an Installation Timeline. Provide a copy to the CAM.

## **Products**

- MD/HD ZEV and ZEV Infrastructure Goals
- Usage Patterns Report
- EVSE Location Decision Matrix
- Map(s) of optimal locations for MD/HD charging infrastructure
- Microgrid Scoping Analysis
- Smart Charging Assessment
- Charging Infrastructure Plans for UNFI Depots
- Installation Timeline

## **Task 3.2 Technology and System Analysis**

The project team will facilitate and conduct a Technology and Systems analysis to support the Blueprint development process.

### **The Recipient shall:**

- Analyze the combination of technologies and systems that offer the best mix of economic, environmental, and technical performance specific to UNFI and its California operations that will address potential infrastructure barriers.
- Draft a Summary and Technology Presentation using information shared from technology manufacturers and operators with a focus on raising awareness and enhancing educational opportunities for UNFI staff and key partners. Key approaches and technologies to be analyzed include:
  - Vehicle-Grid Integration (VGI) standards and open standards-based network communications.
  - Integration with energy storage and solar systems for the electricity grid to promote resilience.
  - Assess potential for utilizing onsite solar for hydrogen production as a transport fuel.
  - Interoperability of MD/HD charging connectors and/or charging interfaces compatible with MD/HD vehicles sold by multiple original automotive equipment manufacturers for widespread use across California and North America
- Provide a copy of the Summary and Technology Presentation to the CAM.
- Engage original equipment manufacturers (OEMs) of MD/HD vehicles to understand their visions for connectors and interfaces.
- Analyze anticipated charging behavior and grid impacts to SCE and PG&E to ensure

adequate service capacity and to develop smart charging protocols that minimize impacts on the grid.

- Identify analytical tools, software applications, and data requirements to improve future MD/HD ZEV infrastructure planning activities.
- Identify each task or area of responsibility required of the project partners and stakeholder groups to develop a replicable approach for other fleets transitioning to zero-emission.
- Develop a Summary of Key Findings on MD/HD Technology and Systems. Provide a copy to the CAM.

**Products:**

- System and Technology Presentation
- Summary of Key Findings on MD/HD Technology and Systems

**Task 3.3 Projected Electrification Impacts and Stakeholder Benefit Report**

The project team will develop a Projected Electrification Impacts and Stakeholder Benefit Report.

**The Recipient shall:**

- Summarize the types of jobs that will be created for the local community and regional industries.
- Develop strategies that will enable training, education, and readiness for the local workforce to obtain the skills, knowledge, and ability to develop, support, and maintain MD/HD ZEV fleets, to implement the Blueprint, and participate in the broader zero-emission industry.
- Identify goals to reduce GHG emissions, criteria air pollutants, and toxic air contaminants for the region, and the emitters at the local level that would need to be targeted.
- Identify economic, health and safety and consumer benefits that will accrue to low-income, DAC, and priority populations in the vicinity of leading UNFI Distribution Centers.
- Produce a Projected Electrification Impacts and Stakeholder Benefit Report summarizing the activities conducted in this task and the feedback provided by key stakeholders. Provide a copy to the CAM.

**Products:**

- Projected Electrification Impacts and Stakeholder Benefit Report

**TASK 4 PROJECT FACT SHEET**

The goal of this task is to develop an initial and final project fact sheet that describes the CEC-funded project and the benefits resulting from the project for the public and key decision makers.

**The Recipient shall:**

- Prepare an Initial Project Fact Sheet at start of the project that describes the project and the expected benefits. Use the format provided by the CAM.
- Prepare a Final Project Fact Sheet at the project's conclusion that describes the project, the actual benefits resulting from the project, and lessons learned from implementing the project. Use the format provided by the CAM.

- Provide at least six High Quality Digital Photographs (minimum resolution of 1300x500 pixels in landscape ratio) from the project.

#### **Products**

- Initial Project Fact Sheet
- Final Project Fact Sheet
- High Quality Digital Photographs

### **TASK 5 BLUEPRINT**

The goal of this task is to formalize the information gathered through the Task 2 and Task 3 into a formal Blueprint that can be shared with key stakeholders.

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

- Prepare a Blueprint Outline that conveys the intended structure of the Blueprint and the intended goals and outcomes of major sections.
- Integrate findings from the Technical Tasks into the Blueprint Outline.
- Complete Draft Blueprint.
- Incorporate feedback as provided by the CAM.
- Prepare Final Blueprint.

#### **Products:**

- Blueprint Outline
- Draft Blueprint
- Final Blueprint

STATE OF CALIFORNIA

STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: UNITED NATURAL FOODS, INC.

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

**RESOLVED**, that the CEC approves Agreement ARV-21-011 with United Natural Foods, Inc. for a \$200,000 grant to develop a planning blueprint to accelerate the deployment of ZEVs and related infrastructure to decarbonize the company's logistics chain, advance science-based sustainability targets, and to promote technological replicability; and

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

**CERTIFICATION**

The undersigned Secretariat to the CEC 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 CEC held on July 15, 2021.

AYE:

NAY:

ABSENT:

ABSTAIN:

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Liza Lopez  
Secretariat