



STATE OF CALIFORNIA

GRANT REQUEST FORM (GRF)

CEC-270 (Revised 12/2019)

CALIFORNIA ENERGY COMMISSION

A) New Agreement # ARV-21-002 (to be completed by CGL office)

B) Division	Agreement Manager:	MS-	Phone
600 Fuels and Transportation Division	Jane Berner	06	916-903-4286

C) Recipient's Legal Name	Federal ID #
EVmatch, Inc.	81-3801770

D) Title of Project
EVmatch Reservation-Based Shared EV Charging in Multi-Family Properties

E) Term and Amount

Start Date	End Date	Amount
07 / 15 / 2021	12 / 31 / 2023	\$ 728,250

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 Matt Alexander Time Needed: 5 minutes

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

Agenda Item Subject and Description:

Proposed resolution approving Agreement ARV-21-002 with EVmatch, Inc. for a \$728,250 grant to install 120 new shared, reservable electric vehicle (EV) charging stations at multi-unit dwellings (MUDs) in Santa Clara, Los Angeles, and San Diego Counties, and adopting staff's determination that this action is exempt from CEQA. The learnings from the site identification, installation, and use phases of the project across the three geographies will provide insights into what characteristics drive the greatest utilization of EV chargers in MUD settings.

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, §§ 15301, 15303

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

Explain reason why Agreement is exempt under the above section:

This project involves the installation of 120 electric vehicle chargers at multi-family residential buildings in the counties Los Angeles, San Diego, and Santa Clara. All installation sites will be in urban, residential areas. The installations will be on



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previously developed land such as existing parking lots. Some minor modifications to the sites may be needed such as trenching to run electrical wire and the replacement of electrical panels and breakers. None of the installation sites will involve historic resources or historic buildings.

This project is therefore categorically exempt from environmental review pursuant to section 15301 of the CEQA Guidelines because it consists of the minor alteration of existing structures, facilities, mechanical equipment, or topographical features involving negligible or no expansion of existing or former use at the sites. The project is also categorically exempt pursuant to section 15303 of the CEQA Guidelines because it consists of the construction and location of limited numbers of new, small structures and/or the installation of small new equipment in small structures with only minor modifications to the structures. The project does not involve any unusual circumstances, will not result in damage to any scenic resources within a highway officially designated as a state scenic highway, none of the sites are included on any list compiled pursuant to Government Code section 65962.5, and the project will not cause a substantial adverse change in the significance of a historical resource. The project, when considered as a whole, will not result in a cumulative impact that is significant on the environment. Therefore, none of the exceptions to exemptions listed in CEQA Guidelines section 15300.2 apply to this project and this project 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
☐ 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
ABM Electrical & Lighting Solutions, Inc.	\$ 405,300
Enel X North America, Inc.	\$ 168,500
Suacci	\$ 139,750

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

Legal Company Name:
Silicon Valley Clean Energy



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J) Budget Information

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
ARFVTP	18/19	601.118K	\$728.250
Funding Source			\$

R&D Program Area: Select Program Area TOTAL: \$728,250

Explanation for "Other" selection

Reimbursement Contract #:

Federal Agreement #:

K) Recipient's Contact Information**1. Recipient's Administrator/Officer**

Name: Heather Hochrein

Address: 1877 Poplar Ave

City, State, Zip:

Redwood City, CA 94061

Phone: (530) 260-3619

E-Mail: heather@evmatch.com

2. Recipient's Project Manager

Name: Heather Hochrein

Address: 1877 Poplar Ave

City, State, Zip:

Redwood City, CA 94061

Phone: (530) 260-3619

E-Mail: heather@evmatch.com

L) Selection Process Used☒ Competitive Solicitation Solicitation #: GFO-20-605☐ First Come First Served Solicitation Solicitation #: - -**M) The following items should be attached to this GRF**

1. Exhibit A, Scope of Work
2. Exhibit B, Budget Detail
3. CEC 105, Questionnaire for Identifying Conflicts
4. Recipient Resolution
5. CEQA Documentation

☒ N/A☐ N/A☒ Attached☒ Attached☒ Attached☐ Attached☒ Attached


Agreement Manager


7/1/2021

Date


Office Manager

7/1/21

Date


Deputy Director

7/2/2021

Date

Exhibit A SCOPE OF WORK

TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2	X	Site Selection and EVSE Deployment in Santa Clara County
3	X	Site Selection and EVSE Deployment in Los Angeles County
4	X	Site Selection and EVSE Deployment in San Diego County
5	X	Customer Service, Monitoring, and Driver Recruitment
6		Develop Project Fact Sheet
7		Data Collection and Analysis

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Heather Hochrein		
2	William Truesdell	ABM Electrical & Lighting Solutions, Inc., Enel X North America, Inc.	Silicon Valley Clean Energy
3	William Truesdell	ABM Electrical & Lighting Solutions, Inc., Enel X North America, Inc.	
4	William Truesdell	Suacci, Enel X North America, Inc.	
5	William Truesdell		
6	Heather Hochrein, William Truesdell		
7	Heather Hochrein		

GLOSSARY

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

Term/ Acronym	Definition
AB	Assembly Bill
AHJ	Authority Having Jurisdiction
CAM	Commission Agreement Manager

Term/ Acronym	Definition
CAO	Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
EVITP	Electric Vehicle Infrastructure Training Program
EVSE	Electric Vehicle Supply Equipment
FTD	Fuels and Transportation Division
GHG	Greenhouse Gas
MUD	Multi-unit Dwelling
Recipient	EVmatch, Inc.
SVCE	Silicon Valley Clean Energy

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, clean air, and alternative energy policies. AB 8 (Perea, Chapter 401, Statutes of 2013) re-authorizes the Clean Transportation Program through January 1, 2024. 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.

On August 7, 2020, the CEC released a Grant Solicitation and Application Package entitled “BESTFIT Innovative Charging Solutions” under the Clean Transportation Program. This competitive grant solicitation offered to fund projects that demonstrate transformative technology solutions and work to accelerate the successful commercial deployment of electric vehicle (EV) charging for both light-duty (LD) and medium- and heavy-duty (MD/HD) applications. In response to GFO-20-605, EVmatch, Inc. (Recipient) submitted application number 12, which was proposed for funding in the CEC’s Notice of Proposed Awards on April 16, 2021. GFO-20-605 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 the CEC’s Award, the CEC’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:

Renters living in multi-unit dwellings (MUDs) in California have limited access to convenient EV charging access. This limited access is inhibiting the adoption of EVs among this underserved demographic and stalling widespread vehicle electrification, which is one of the most promising greenhouse gas (GHG) emissions reduction strategies for the State.

Goals of the Agreement:

The goal of this Agreement is to increase access to EV charging at MUDs through widespread deployment of a novel hardware/software technology that increases electric vehicle supply equipment (EVSE) utilization, reduces upfront and operating costs, and enhances charging reliability. This increased charging access will lead to increased EV adoption rates among renters and MUD residents throughout California.

Objectives of the Agreement:

The objectives of this Agreement are to deploy at least 120 shared EV charging stations at MUDs throughout Los Angeles, San Diego, and Santa Clara counties and enable shared public access through EVmatch’s software service. By deploying Enel X JuiceBox Pro single-port Level 2 charging stations, this project aims to increase EV adoption directly among tenants living in the properties where EVSE will be installed and demonstrate that providing public access of EVSE at MUDs increases asset utilization.

The target number of sites and chargers are as follows:

County	Number of MUDs	Total Number of Chargers Installed
Santa Clara	10 to 18	40 to 108*
Los Angeles	9 to 15	36 to 90*
San Diego	9 to 15	36 to 90*
TOTAL		Minimum 120**

*The number of MUDs and number of chargers to be installed in each county may be changed with prior CAM written approval.

**The total number of chargers to be installed may be changed with prior CAM written approval. The CEC reserves the right to reduce the total grant amount in proportion to any reduction of the total number of chargers to be installed.

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

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 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.
- 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 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 CAO, 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 CAO about the following Agreement closeout items:

- What to do with any equipment purchased with CEC funds (Options)

- CEC'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 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 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 the 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 SITE SELECTION AND EVSE DEPLOYMENT IN SANTA CLARA COUNTY

The goal of this task is to recruit 10-18 MUD properties in Silicon Valley Clean Energy (SVCE) service territory in Santa Clara County to deploy 4-6 shared Enel X JuiceBox Pro Level 2 EV charging stations at each site.

The Recipient shall:

- Establish Sales Lead staff person for Santa Clara County for a minimum of two years to manage site recruitment and EVSE installations, educate new site hosts and EV drivers on EVmatch technology to increase EVSE utilization, and coordinate work of the Regional Sales Leads in Los Angeles and San Diego Counties. The Sales Lead will:

- Conduct direct outreach and sales to property owners and management companies.
- Implement targeted email and online marketing campaigns to recruit site hosts.
- Coordinate marketing efforts with SVCE staff to ensure effective and streamlined communication across existing technical assistance and energy outreach programs.
- Coordinate with other organizations, such as the Sierra Club, GRID Alternatives, and Drive Clean Bay Area, to identify and recruit site hosts.
- Coordinate a site assessment by an electrician at each pre-qualified property and receive a quote for EVSE installation.
- Finalize site selection for the area based on received installation quotes, an evaluation of technical barriers, and a review of budget constraints.
- Coordinate with selected electrician(s) for drawings and load calculations for each site.
- Prepare and submit outreach and marketing materials summary document for Santa Clara County, including list of all contacted properties and those pre-qualified for assessment, finalized list of selected sites, and design drawings and load calculations for each site.
- Procure and install a minimum of 4 shared Enel X JuiceBox Pro Level 2 EV chargers per site at a minimum of 10 MUD property sites in Santa Clara County.
- Document and submit photographs of completed installed EV charging stations and supporting equipment for each site.
- Submit an AB 841 Certification that certifies the project has complied with all AB 841 (Ting, Chapter 372, Statutes of 2020) requirements specified in Exhibit C or describes why the AB 841 requirements do not apply to the project. The certification shall be signed by Recipient's authorized representative. Although AB 841 becomes effective January 1, 2022, as a policy matter the CEC is applying the EVITP certification requirements to project work funded under this Agreement, regardless of whether it might be performed prior to January 1, 2022, unless an exception applies.
- Submit Electric Vehicle Infrastructure Training Program (EVITP) Certification Numbers of each EVITP-certified electrician that installed electric vehicle charging infrastructure or equipment. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

Products:

- Outreach and marketing materials summary document
- Photographs of the installed EV charging stations and supporting equipment for each site
- AB 841 Certification signed by Recipient's authorized representative
- EVITP Certification Numbers of each EVITP certified electrician

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

TASK 3 SITE SELECTION AND EVSE DEPLOYMENT IN LOS ANGELES COUNTY

The goal of this task is to recruit 9-15 MUD properties in Los Angeles County to deploy 4-6 shared Enel X JuiceBox Pro Level 2 EV charging stations at each site.

The Recipient shall:

- Establish Regional Sales Lead for Los Angeles County for a minimum of two years to manage site recruitment and EVSE installations, and to educate new site hosts and EV drivers on EVmatch technology to increase EVSE utilization. The Regional Sales Lead will:
 - Conduct direct outreach and sales to property owners and management companies.
 - Implement targeted email and online marketing campaigns to recruit site hosts.
 - Conduct outreach to Southern California Edison and Southern California Public Power Authority member utilities to solicit support and collaboration on site recruitment activities in relevant service territories.
 - Coordinate with other organizations, such as GRID Alternatives, to identify and recruit site hosts.
 - Coordinate a site assessment by an electrician at each pre-qualified property and receive a quote for EVSE installation.
 - Finalize site selection for the area based on received installation quotes, an evaluation of technical barriers, and a review of budget constraints.
 - Coordinate with selected electrician(s) for drawings and load calculations for each site.
 - Prepare and submit outreach and marketing materials summary document for Los Angeles County, including list of all contacted properties and those pre-qualified for assessment, finalized list of selected sites, and design drawings and load calculations for each site.

- Procure and install a minimum of 4 shared Enel X JuiceBox Pro Level 2 EV chargers at a minimum of 9 MUD property sites in Los Angeles County.
- Document and submit photographs of completed installed EV charging stations and supporting equipment for each site.
- Submit an AB 841 Certification that certifies the project has complied with all AB 841 (Ting, Chapter 372, Statutes of 2020) requirements specified in Exhibit C or describes why the AB 841 requirements do not apply to the project. The certification shall be signed by Recipient's authorized representative. Although AB 841 becomes effective January 1, 2022, as a policy matter the CEC is applying the EVITP certification requirements to project work funded under this Agreement, regardless of whether it might be performed prior to January 1, 2022, unless an exception applies.
- Submit Electric Vehicle Infrastructure Training Program (EVITP) Certification Numbers of each EVITP-certified electrician that installed electric vehicle charging infrastructure or equipment. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

Products:

- Outreach and marketing materials summary document
- Photographs of the installed EV charging stations and supporting equipment for each site
- AB 841 Certification signed by Recipient's authorized representative
- EVITP Certification Numbers of each EVITP certified electrician

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

TASK 4 SITE SELECTION AND EVSE DEPLOYMENT IN SAN DIEGO COUNTY

The goal of this task is to recruit 9-15 MUD properties in San Diego County to deploy 4-6 shared Enel X JuiceBox Pro Level 2 EV charging stations at each site.

The Recipient shall:

- Establish Regional Sales Lead for San Diego County for a minimum of two years to manage site recruitment and EVSE installations, and to educate new site hosts and EV drivers on EVmatch technology to increase EVSE utilization. The Regional Sales Lead will:
 - Conduct direct outreach and sales to property owners and management companies.
 - Implement targeted email and online marketing campaigns to recruit site hosts.

- Conduct outreach to San Diego Gas and Electric to solicit support and collaboration on site recruitment activities in their service territory.
- Coordinate with other organizations, such as GRID Alternatives, to identify and recruit site hosts.
- Coordinate a site assessment by an electrician at each pre-qualified property and receive a quote for EVSE installation.
- Finalize site selection for the area based on received installation quotes, an evaluation of technical barriers, and a review of budget constraints.
- Coordinate with selected electrician(s) for drawings and load calculations for each site.
- Prepare and submit outreach and marketing materials summary document for San Diego County, including list of all contacted properties and those pre-qualified for assessment, finalized list of selected sites, and design drawings and load calculations for each site.
- Procure and install a minimum of 4 shared Enel X JuiceBox Pro Level 2 EV chargers at a minimum of 9 MUD property sites in San Diego County.
- Submit an AB 841 Certification that certifies the project has complied with all AB 841 (Ting, Chapter 372, Statutes of 2020) requirements specified in Exhibit C or describes why the AB 841 requirements do not apply to the project. The certification shall be signed by Recipient's authorized representative. Although AB 841 becomes effective January 1, 2022, as a policy matter the CEC is applying the EVITP certification requirements to project work funded under this Agreement, regardless of whether it might be performed prior to January 1, 2022, unless an exception applies.
- Submit Electric Vehicle Infrastructure Training Program (EVITP) Certification Numbers of each EVITP-certified electrician that installed electric vehicle charging infrastructure or equipment. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

Products:

- Outreach and marketing materials summary document
- Photographs of the installed EV charging stations and supporting equipment for each site
- AB 841 Certification signed by Recipient's authorized representative
- EVITP Certification Numbers of each EVITP certified electrician

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

TASK 5 CUSTOMER SERVICE, MONITORING, AND DRIVER RECRUITMENT

The goal of this task is to successfully onboard each new site host in Santa Clara, Los Angeles, and San Diego counties onto the EVmatch software platform, customize user groups appropriately, provide ongoing customer service and EVSE monitoring, and recruit drivers to increase utilization.

The Recipient shall:

- Hold an onboarding call or in-person meeting with each new site host (property owner or manager) to provide EVmatch software training, including how to set up availability schedules and pricing according to site-specific needs.
- Provide ongoing monitoring of all EVSE on the EVmatch platform, provide customer service to EV drivers and site hosts, and inform site hosts of needed maintenance.
- Conduct outreach to the MUD residents through marketing and advertising channels to recruit EV drivers who will increase utilization of the installed chargers.
- Prepare and submit Summary Report, including list of site hosts onboarded, date of call/meeting, and a summary of any learnings or useful feedback received during these conversations; descriptions and examples of outreach materials developed and used; and quantifications of outreach and success in recruitment.

Products:

- Summary Report

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

TASK 6 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 (6) 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 7 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 regular progress reports and the Final Report.

The Recipient shall:

- Develop data collection test plan for deployed charging equipment.
- Troubleshoot any issues identified.
- Collect a minimum of 12 months of data on charging events for the deployed infrastructure including, but not limited to:
 - Charge and session duration
 - Energy delivered (kWh)
 - Peak power delivered (kW)
 - Applicable price for charging, including but not limited to electric utility tariff, EVSP service contract, or public charger price
 - Payment method
 - Types of vehicles using the charging equipment
 - Number of unique vehicles and frequency of “repeat vehicles”
 - Energy delivered back to grid or facility if a bidirectional charging use case (kWh)
- Submit the data described above electronically in a monthly progress report throughout the duration of the data collection period.
- Develop a plan to provide other relevant data and information throughout the duration of the Agreement including, but not limited to:
 - Lessons learned
 - Best practices (e.g., permitting and installation processes)
 - Job creation
 - Economic development
 - Increased state revenue
- Submit the data described above electronically in a quarterly progress report throughout the duration of the agreement.

- Identify any planned use of renewable energy in the project.
- Compare any project performance and expectations provided in the proposal to the CEC with actual project performance and accomplishments.
- Collect data, information, and analysis described above and include in the Final Report.

Products:

- Data collection on charging events will be submitted electronically in a monthly progress report.
- Data collection on other relevant data and information described above will be submitted electronically in a quarterly progress report.
- Data collection information and analysis will be included in the Final Report.

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: EVMATCH, 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-21-002 with EVmatch, Inc. for a \$728,250 grant to install 120 new shared, reservable EV charging stations at multiunit dwellings (MUDs) in Santa Clara, Los Angeles, and San Diego Counties. The information from the site identification, installation, and use phases of the project across the three geographies will provide insight into characteristics that drive the greatest utilization of EV chargers in MUD settings; 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:

Liza Lopez
Secretariat