



STATE OF CALIFORNIA

GRANT REQUEST FORM (GRF)

CEC-270 (Revised 12/2019)

CALIFORNIA ENERGY COMMISSION

A) New Agreement # ARV-21-020 (to be completed by CGL office)

B) Division	Agreement Manager:	MS-	Phone
600 Fuels and Transportation Division	Esther Odufuwa		916-897-3612

C) Recipient's Legal Name	Federal ID #
Santa Barbara Metropolitan Transit District	95-2546247

D) Title of Project
Santa Barbara Zero-Emission Resilient Transportation Blueprint(SB-ZERT)

E) Term and Amount

Start Date	End Date	Amount
8 / 11 / 2021	01 / 31 / 2024	\$ 200,000

F) Business Meeting Information

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

Proposed Business Meeting Date 08 / 11 / 2021 ☐ Consent ☒ Discussion

Business Meeting Presenter Kathryn Reid Time Needed: 5 minutes

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

Agenda Item Subject and Description:

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT. Proposed resolution approving Agreement ARV-21-020 with Santa Barbara Metropolitan Transit District for a \$200,000 grant to develop a blueprint that will enable the adoption of MD/HD EVs for transit and municipal fleets, and adopting staff's determination that this action is exempt from CEQA. (Clean Transportation Program funding).Contact: Esther Odufuwa. (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 datacollection, 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 construction. This project involves data collection, technology assessment, public outreach,



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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
CALSTART, LLC	\$ 185,000.00
CITY OF SANTA BARBARA	\$ 15,000.00
	\$

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
Funding Source	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 #:

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

Name: Jerry Estrada

Address: 555 Olive Street

City, State, Zip: Santa Barbara, CA 93101

Phone: (815) 963-3364 x232



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E-Mail: il: jestrada@sbmtd.gov

2. Recipient's Project Manager

Name: Ryan Gripp

Address: 550 Olive Street

CALIFORNIA ENERGY COMMISSION

City, State, Zip: Santa Barbara, CA
93101

Phone: (805) 963-3364 x242

E-Mail: rgripp@sbmtd.gov

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

Elizabeth John

7-20-2021

Agreement Manager

Date

Elizabeth John

7/20/2021

Office Manager

Date

John Butler II

7/20/2021

Deputy Director

Date

**Exhibit A
SCOPE OF WORK**

TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2	X	Planning Development & Collaboration
3		Project Fact Sheet
4		Final MTD Blueprint

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Jerry Estrada (Santa Barbara MTD) Fred Silver (CALSTART) Bryan Lee (CALSTART) Kristian Jokinen (CALSTART) Katrina Sutton (CALSTART)	CALSTART, LLC (CALSTART)	
2	Nolan Robertson (Santa Barbara MTD) Alelia Parenteau (City of Santa Barbara) Hillary Blackerby (Santa Barbara MTD) Ryan Gripp (Santa Barbara MTD) Fred Silver Bryan Lee Kristian Jokinen Katrina Sutton	CALSTART, LLC City of Santa Barbara	
3	Hillary Blackerby Ryan Gripp Fred Silver Bryan Lee Kristian Jokinen Katrina Sutton	CALSTART, LLC	
4	Fred Silver Bryan Lee Kristian Jokinen Katrina Sutton	CALSTART, LLC	

GLOSSARY

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

Term/ Acronym	Definition
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CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CAP	Climate Action Plan
CEC	California Energy Commission
City	City of Santa Barbara
Clean Transportation Program	Formerly known as Alternative and Renewable Fuel and Vehicle Technology Program
CPR	Critical Project Review
FMP	Facilities Master Plan
FTD	Fuels and Transportation Division
GHG	Greenhouse Gas Emissions
MD/HD	Medium- and Heavy-Duty
MTD	Santa Barbara Metropolitan Transit District
Recipient	Santa Barbara Metropolitan Transit District
SEP	Strategic Energy Plan
ZEV	Zero-Emission Vehicle

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 #38, 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 City of Santa Barbara’s (City) Strategic Energy Plan (SEP) set forth a regional climate change initiative to achieve 100% renewable energy by 2030, which is 10 years ahead of the state mandate. The SEP also identifies Smart Energy Zones, which create a designated part of the City where new policies and programs can be piloted and improved before replicating them throughout the entire City. Furthermore, in 2019, Santa Barbara Metropolitan Transit District (MTD) updated its Facilities Master Plan (FMP) to meet the California Air Resources Board’s new Innovative Clean Transit Regulations. The FMP will guide MTD in overhauling its fleet to transition to zero-emission transit buses and fully electrify its 113 buses by 2030. To join the City in achieving its initiatives while achieving its own plan to electrification, MTD must create a Blueprint that will guide its efforts to achieve fleet resiliency, resulting in a replicable model for not only MTD’s facilities and fleet but for similar entities throughout the region. The result of the Blueprint will also protect against grid outages caused by climate change and natural disasters while mitigating demand charges, reducing energy costs, and providing clean, renewable energy.

Goals of the Agreement:

The goal of this Agreement is to develop a Blueprint that will enable the adoption of medium- and heavy-duty (MD/HD) electric vehicles for transit and municipal fleets and lead to future projects that will generate clean and renewable energy, reducing the region and state’s dependence on fossil fuels while reducing greenhouse gas emissions and providing first responder support during local disasters. The resulting Blueprint will guide MTD’s development of a microgrid design that will support fleet resiliency at MTD’s terminal in Downtown Santa Barbara, located in the City’s Smart Energy Zone.

Objectives of the Agreement:

To achieve these goals, MTD will pursue the following objectives:

- Develop a Blueprint that will lead to future projects to generate clean and renewable energy, decrease the region and state’s dependence on fossil fuels, reduce greenhouse gas emissions, provide first responder support during local disasters, and enable the adoption of MD/HD electric vehicles for transit and municipal fleets.

- Coordinate with the City to engage and educate community stakeholders, foster the adoption of renewable energy generation, and further the transition to MD/HD electric vehicles.
- Develop a conceptual design and financing options for a microgrid to support fleet resiliency at MTD's terminal in Downtown Santa Barbara.

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 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 PLANNING DEVELOPMENT & COLLABORATION**

The goal of this task is to develop project goals and milestones, engage key stakeholders and community members, complete a technology and systems analysis, implement research and development, create a replicable model and outreach and economic benefits strategies, and calculate GHG reductions and environmental benefits.

Task 2.1 Identify Goals and Milestones

The goal of this task is to identify zero-emission goals for MTD and for the broader community, establishing objectives and timelines to move adoption of ZEV technologies.

The Recipient shall:

- Identify zero-emission transportation goals within the community, analyzing both electric and hydrogen as possible power sources.
- Identify other zero-emission transportation goals for MTD.
- Express all goals and objectives in quantified and measurable terms.
- Establish and articulate timeline targets in which to adopt ~100% zero-emission vehicles for all vehicle classes and all public fleets domiciled or operating regularly within the city limits of Santa Barbara.
- Prepare a Blueprint Research Report, which will include actions, milestones, and timeline targets for meeting transportation goals and objectives and microgrid construction. Provide a copy to the CAM.

Products:

- Blueprint Research Report

Task 2.2 Research and Documentation

The goal of this task is to conduct research and document steps already taken in the City and County of Santa Barbara to drive medium- and heavy-duty ZEV infrastructure development and deployment.

The Recipient shall:

- Research and document actions or steps already adopted by the City and County.
- Complete a Summary of MD/HD ZEV Infrastructure Development and Deployment.
- Provide a copy of the Summary of MD/HD ZEV Infrastructure Development and Deployment to the CAM.

Products:

- Summary of MD/HD ZEV Infrastructure Development and Deployment

Task 2.3 Engagement and Outreach

The goal of this task is to engage utilities, jurisdictions, community-based organizations (CBOs), financial institutions, regional workplaces, businesses, residents, and other stakeholders to understand needs, review current and planned efforts, and educate about the project and ZEV adoption. Develop and execute a robust outreach plan with the City as part of their Climate Action Plan, with a specific focus on ZEV infrastructure and adoption and energy resilience.

The Recipient shall:

- Develop an Outreach Plan, including printed and digital education materials and advertising, in concert with the City's Climate Action Plan (CAP) outreach work. Provide copy of Outreach Plan to the CAM.
- Execute Outreach Plan, and engage the following:
 - Utility(ies) to provide technical input towards electrification.

- Local jurisdictions and planning organizations to review planning and permitting and coordinate current efforts.
- Financial institutions and other finance mechanisms to finance the project, which may include education, being involved and participation in the implementation of the project.
- Regional CBOs, Community Leaders, and potentially affected local residents in the planning process, understand their specific needs, incorporate these into planning process, and also educate them on the benefits of ZEV transportation.
- Regional workplaces, business owners and operators to share project learnings and best practices for electrification and ZEV deployment.
- MTD employees for possible use of stations at the Terminal.
- Identify organizations and companies that need assistance with planning to transition to zero-emission fleets, and degree of assistance needed.
- Develop localized outreach materials for MD/HD fleets that makes the economic, operational, and other business cases for zero-emission fleet transition. Provide copies of outreach material to the CAM.
- Utilize the City's CAP, interactive, "one-stop shop" website to inform and educated the public on the Blueprint planning process and broader ZEV work.
- Host workshops for the public where individuals can brainstorm and share ideas.
- Host theme-based stakeholder workshops led by subject matter experts to build upon the feedback and ideas contributed by the public.
- Implement workforce and educational outreach, including a webinar with presentations from educational partners and how they interacted with the project. This can include research outcomes, student work product, and information from field trips.
- Provide the CAM with a list of completed engagement activities and summary notes of each meeting engagement.
- Develop a Study for Expanding Use of Public Charging Facilities to address how the City and other entities can share energy. Provide a copy to the CAM.

Products:

- Outreach Plan
- List of completed engagement activities
- Summary notes of each meeting engagement
- Study of Expanding Use of Public Charging Facilities

Task 2.4 Technology and System Analysis

The goal of this task is to review and analyze technology options, standards, and compatibility for a microgrid and MD/HD ZEV infrastructure. This task also includes integrating route modeling into microgrid design.

The Recipient shall:

- Review and analyze available MD/HD zero-emission technology options.
- Review and analyze Vehicle-to-“X” Integration standards.
- Review and analyze interoperable and compatible MD/HD charging connectors and charging interfaces.
- Review and analyze other methods of enhancing grid-reliability by providing data to utilities.
- Draft an analysis of optional technology combinations that deliver the best mix of economic, environmental, and technical performance specific to the transit fleet microgrid.
- Integrate route modeling into microgrid design considerations.
- Finalize the Analysis of Optimal Technology Combinations and provide a copy to the CAM.

Products:

- Analysis of Optimal Technology Combinations

Task 2.5 Replicability

The goal of this task is to develop a white paper and resources to share learnings from the project to allow for replication by other entities.

The Recipient shall:

- Develop White Paper with steps for deploying MD/HD ZEV infrastructure and microgrid to direct and facilitate the overall process. Include in White Paper:
 - Analytical tools, software applications, and data needed to improve future MD/HD ZEV infrastructure planning activities.
- Present White Paper at conferences to share best practices and lessons learned.
- Provide a list of conferences presented at and a copy of presentation materials to the CAM.
- 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.
- Prepare a summary of tasks or area of responsibilities required of stakeholders and provide a copy to the CAM.

Products:

- White Paper
- List of conferences presented at and presentation materials
- Summary of tasks or area of responsibilities required of stakeholders

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

Task 2.6 Economic Benefits

The goal of this task is to analyze and summarize economic benefits and job creation for the local community resulting from the project.

The Recipient shall:

- Summarize the types of jobs that will be created for the local community. Research and provide job related data such as demand numbers, project growth and wage levels, and credentials required.
- Provide a copy of the Summary of Jobs to the CAM.
- Perform an economic benefits analysis that quantifies the economic benefits of the project with particular attention to benefits accruing to low-income communities.
- Provide a copy of the Economic Benefits Analysis to the CAM.

Products:

- Summary of Jobs
- Economic Benefits Analysis

Task 2.7 Greenhouse Gas Emissions (GHG) and Low-Income Community (LIC) Benefits

The goal of this task is to identify GHG emissions, criteria air pollutants, and toxic air contaminants and calculate project reductions and benefits to the community.

The Recipient shall:

- Identify goals to reduce GHG emissions, criteria air pollutants, and toxic air contaminants for the region, and the emitters at the local level.
- Calculate overall project GHG reductions and environmental impacts achievable based on Blueprint's proposed elements.
- Identify the emission reduction benefits that would accrue to specifically to low-income communities and priority populations.
- Complete a GHG Emission Reduction Benefits Analysis, with GHG calculations.
- Provide a copy of the GHG Emission Reduction Benefits Analysis to the CAM.

Products:

- GHG Emission Reduction Benefits Analysis

TASK 3 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 4 FINAL MTD BLUEPRINT

The goal of this task is to develop a Blueprint Plan, which will include a Conceptual Design community map, site(s) layout, single-line diagram and financial/utility analysis.

The Recipient shall:

- Develop Draft Blueprint Plan including, but not limited to:
 - Santa Barbara Fleet Inventory with ZE Goals.
 - Transit microgrid technology package and system recommendations.
 - Summary of previous steps taken toward transit electrification.
 - Planning template(s) and guide(s).
 - Conceptual Design community map.
 - List of recommended municipal transit microgrid planning tools.
 - Plan for outreach, economic development, and job training.
 - Economic benefits analysis.
- Develop Final Blueprint Plan.

Products:

- Draft Blueprint Plan
- Final Blueprint Plan

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

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-21-020 with Santa Barbara Metropolitan Transit District for a \$200,000 grant to develop a blueprint that will enable the adoption of MD/HD EVs for transit and municipal fleets; 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 August 11, 2021.

AYE:

NAY:

ABSENT:

ABSTAIN:

Liza Lopez
Secretariat