



STATE OF CALIFORNIA

GRANT REQUEST FORM (GRF)

CEC-270 (Revised 12/2019)

CALIFORNIA ENERGY COMMISSION

A) New Agreement # ZVI-22-013 (to be completed by CGL office)

B) Division	Agreement Manager:	MS-	Phone
Fuels and Transportation Division	Rose Strauss		916-908-7493

C) Recipient's Legal Name	Federal ID #
Sacramento Municipal Utility District	94-6001157

D) Title of Project
ChargeReady Community

E) Term and Amount

Start Date	End Date	Amount
9/14/2022	6/30/2025	\$ 2,229,000

F) Business Meeting Information

- ☐ ARFVTP agreements \$75K and under delegated to Executive Director
Proposed Business Meeting Date 9/14/2022 ☐ Consent ☒ Discussion
Business Meeting Presenter Rose Strauss Time Needed: 5 minutes
Please select one list serve. Altfuels (AB118-ARFVTP)

Agenda Item Subject and Description:**Sacramento Municipal Utility District (SMUD).**

Proposed resolution approving Agreement ZVI-22-013 with SMUD for a \$2,229,000 grant to deploy 108 level 2 charging stations across 6 multi-family housing sites located in disadvantaged and low-income communities and adopting staff's determination that this action is exempt from CEQA. Contact: Rose Strauss (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: 14 CCR 15301, 15304
☐ Common Sense Exemption. 14 CCR 15061 (b) (3) Explain reason why Agreement is exempt under the above section: This project is exempt under CEQA Guidelines §15301, Class 1 Existing Facilities (b) Existing facilities of both investor and publicly owned utilities used to provide electric power, natural gas, sewerage, or other public utility services. The Class 1 exemption applies to the



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"operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, involving negligible or no expansion of use beyond that existing at the time of the lead agency's determination." Section 15304 (f), Minor Alterations to Land, also applies. "Class 4 consists of minor public or private alterations in the condition of land, water, and/or vegetation which do not involve removal of healthy, mature, scenic trees except for forestry or agricultural purposes. Examples include but are not limited to: Minor trenching and backfilling where the surface is restored." The Reliable, Equitable, and Accessible Charging for multi-family Housing (REACH) Project involves minor alterations to land and the trenching or underground directional boring for installation of conduit and therefore is considered exempt in accordance with CEQA Guidelines §15301 and §15304.

- 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, including those listed in the grant application: (attach additional sheets as necessary)

Legal Company Name:	Budget
Mutual Housing California, Subrecipient	\$ 99,000.00
Momentum, Subrecipient	\$ 99,000.00

I) List all key partners, including those listed in the grant application: (attach additional sheets as necessary)

Legal Company Name:
Sacramento Municipal Utility District, Prime

J) Budget Information

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
ZEV: 601.129ZEV	21/22	601.129ZEV	\$2,229,000
Funding Source			\$
Funding Source			\$
Funding Source			\$
Funding Source			\$

R&D Program Area: **Select Program Area**

TOTAL: \$2,229,000

Explanation for "Other" selection



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Reimbursement Contract #:

Federal Agreement #:

K) Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Bob Hollowell

Address: 6201 S Street, MS B357

City, State, Zip: Sacramento, CA
95817-1899

Phone: (916) 732-6451

E-Mail: Bob.Hollowell@smud.org

Name: Marco Lemes

Address: 100 Folsom Blvd., Mail
Stop MA-1

City, State, Zip: Sacramento, CA
95819-4630

Phone: 916-732-5871

E-Mail: marco.lemes@smud.org

2. Recipient's Project Manager

L) Selection Process Used

☒ Competitive Solicitation Solicitation #: GFO-21-603

☐ 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

Date

Office Manager

Date

Deputy Director

Date

Exhibit A SCOPE OF WORK

TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2	X	Community Engagement Program
3		Design and Engineering
4	X	Construction
5		Operations and Maintenance
6		Data Collection and Analysis
7		Project Fact Sheet

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Marco Lemes Shelly Meintzer	Momentum	N/A
2	Kim Rikalo	Mutual Housing	Sacramento Metropolitan Air Quality Management District
3	Marco Lemes Louie Dias	AECOM (previously procured) Mutual Housing	Sacramento Metropolitan Air Quality Management District
4	Marco Lemes Louie Dias	Mutual Housing	
5	Marco Lemes Louie Dias	AECOM (previously procured)	Sacramento Metropolitan Air Quality Management District
6	Dr. Eric Cahill Joe Klein	AECOM (previously procured) Mutual Housing	
7	Marco Lemes Shelly Meintzer	Momentum	

GLOSSARY

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

Term/ Acronym	Definition
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CTP	Clean Transportation Program
CPR	Critical Project Review
DAC	Disadvantaged community
EV	Electric vehicle
EVSE	Electric vehicle supply equipment
FTD	Fuels and Transportation Division
LIC	Low-income community
MFH	Multi-family housing
Recipient	Sacramento Municipal Utility District
SMAQMD	Sacramento Metropolitan Air Quality Management District

Background

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

On November 24, 2021, the California Energy Commission (CEC) released a Grant Funding Opportunity (GFO) entitled “Reliable, Equitable, and Accessible Charging for multi-family Housing (REACH).” This competitive grant solicitation was to demonstrate replicable and scalable business and technology models for large-scale deployment of electric vehicle (EV) charging infrastructure capable of maximizing access and EV travel for multi-family housing (MFH) residents. In response to GFO-21-603, the Recipient submitted application #6 which was proposed for funding in the CEC’s Notice of Proposed Awards on May 11, 2022. GFO-21-603 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 CEC’s Award, 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:

Residents of MFH, especially low-income and disadvantaged communities (LIC/DAC), face barriers to adoption and use of EVs and associated charging infrastructure (Electric Vehicle Supply Equipment, or EVSE). These barriers include inability to afford EVs, inability to access California EV incentives, lack of access to convenient and available charging, lack of awareness about EV and EVSE technology operation, and challenges using credit card payments for electric supply through commercial EVSE.

These barriers have resulted in a dearth of EVSE deployment in MFH locations, especially those with low-income residents. The relative importance of particular barriers can vary from community to community, making it challenging for private EVSE suppliers to successfully deploy infrastructure that is utilized and provides income and profit to their company. Most importantly, EVs are overwhelmingly owned by higher income Californians, with UC Davis documenting an average household income of almost \$192,000 for EV owners in their 2019 dataset. The private marketplace will respond to these households in deployment of EVSE.

Recognizing these barriers, the Sacramento region has adopted a Sacramento Region Zero Emission Vehicle Deployment Strategy. This strategy identifies an initiative to deploy both EV share cars and EVSE in MFH locations. This strategy provides a policy framework and has established partnerships that make it timely to address LIC/DAC and MFH barriers to EV and EVSE adoption. In order to successfully implement this strategy, careful consideration of the above noted barriers is needed, using a model program that includes resident engagement and program evaluation and adaptive management.

Goals of the Agreement:

The goals of this Agreement are:

Goal 1: Market Development: Develop the market for increased uptake of EVs at MFH and under-resourced communities.

Goal 2: Model Innovation and Validation: Validate the business model for pairing no or low-cost carsharing with EV charging infrastructure to improve equitable access to EVs in low-income MFH setting.

Goal 3: Reduce Cost of EV charging for Priority Populations: Minimize cost per resident or per household served.

Goal 4: Demonstrate Reliability and Accessibility: Ensure charging to residents is available when needed to serve all manner of EV accessibility (carshare, carpool, individual ownership).

Objectives of the Agreement:

The objectives of this Agreement are to:

Objective 1: EV Infrastructure: Install 108 Level 2 EV charging stations across 6 MFH sites, resourcing over 1,400 residents in 573 affordable housing units. (Goal 1)

Objective 2: Education: Increase resident understanding of EV and EVSE technology and increase their likelihood to adopt these technologies. (Goal 1)

Objective 3: Carshare Program: Establishment of affordable and accessible EVSE supply to a carshare program provided by the Sacramento Metropolitan Air Quality Management District (SMAQMD). (Goal 2)

Objective 4: Accessibility: Demonstrate no- or low-cost EV charging for MFH residents by using low carbon fuel standard (LCFS) credits, utility programs, and organized utilization (e.g., carsharing) to anchor the upfront investment that does not rely on EV adoption from MFH tenants ahead of EV charging installation. (Goal 3)

Objective 5: Reliability: Maintain 97% uptime and resident satisfaction with the availability and affordability of EVSE supply. (Goal 4)

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.
- Provide a written statement of project activities that have occurred after the notice of proposed awards but prior to the execution of the agreement using match funds. If none, provide a statement that no work has been completed using match funds prior to the execution of the agreement. All pre-execution match expenditures must conform to the requirements in the Terms and Conditions of this Agreement.
- Discuss the following administrative and technical aspects of this Agreement:
 - Agreement Terms and Conditions
 - Critical Project Review (Task 1.2)
 - Match fund documentation (Task 1.7) No reimbursable work may be done until this documentation is in place.
 - Permit documentation (Task 1.8)
 - Subawards needed to carry out project (Task 1.9)
 - The CAM’s expectations for accomplishing tasks described in the Scope of Work
 - An updated Schedule of Products and Due Dates
 - Monthly Calls (Task 1.4)
 - Quarterly Progress Reports (Task 1.5)
 - Technical Products (Product Guidelines located in Section 5 of the Terms and Conditions)
 - Final Report (Task 1.6)

Recipient Products:

- Updated Schedule of Products

- Updated List of Match Funds
- Updated List of Permits
- Written Statement of Match Share Activities

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 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 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 Calls

The goal of this task is to have calls at least monthly between CAM and Recipient to 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 verbally 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, to verify match funds are being proportionally spent concurrently or in advance of CEC funds or are being spent in accordance with an approved Match Funding Spending Plan, to form the basis for determining whether invoices are consistent with work performed, and to answer any other questions from the CAM. Monthly calls might not be held on those months when a quarterly progress report is submitted, or the CAM determines that a monthly call is unnecessary.

The CAM shall:

- Schedule monthly calls.
- Provide questions to the Recipient prior to the monthly call.
- Provide call summary notes to Recipient of items discussed during call.

The Recipient shall:

- Review the questions provided by CAM prior to the monthly call
- Provide verbal answers to the CAM during the call.

Product:

- Email to CAM concurring with call summary notes.

Task 1.5 Quarterly 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 Quarterly 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. Progress reports are due to the CAM the 10th day of each January, April, July, and October. The Quarterly Progress Report template can be found on the ECAMS Resources webpage available at <https://www.energy.ca.gov/media/4691>.

Product:

- Quarterly Progress Reports

Task 1.6 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.

In addition to any other applicable requirements, the Final Report must comply with the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. 12101 et seq.), which prohibits discrimination on the basis of disability; all applicable regulations and guidelines issued pursuant to the ADA; Cal. Gov. Code sects. 7405 and 11135; and Web Content Accessibility Guidelines 2.0, or a subsequent version, as published by the Web Accessibility Initiative of the World Wide Web Consortium at a minimum Level AA success criteria.

The Recipient shall:

- Prepare an Outline of the Final Report, if requested by the CAM.
- Prepare a Final Report complying with ADA requirements and 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 1.7 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 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 1.8 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 may 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 1.9 Obtain and Execute Subawards

The goal of this task is to ensure quality products and to procure subrecipients 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.

The Recipient shall:

- Manage and coordinate subrecipient activities.
- If requested by the CAM, submit a draft of each subaward required to conduct the work under this Agreement to the CAM for review.
- If requested by the CAM, submit a final copy of the executed subaward.
- If Recipient intends to add new subrecipients or change subrecipients, then the Recipient shall notify the CAM.

Products:

- Letter describing the subawards needed, or stating that no subawards are required
- Draft subcontracts (if requested)
- Final subcontracts (if requested)

TECHNICAL TASKS

TASK 2 COMMUNITY ENGAGEMENT PLAN

The goal of this task is to provide MFH residents with information on EV/EVSE, to engage them with use of the EVSE and to evaluate the success of this information and engagement effort. The plan and its implementation will leverage outreach efforts of the Sacramento Metropolitan Air Quality Management District's (SMAQMD) car share program.

The Recipient shall:

- Develop a *Draft Community Engagement Plan*, which shall include, but not be limited to:
 - Engagement objectives, target audiences, appropriate outreach media, and an implementation schedule.
 - EV awareness feedback, which will include residents' understanding of EVs and their likelihood to adopt EV/EVSE.
 - An evaluation of resident satisfaction, availability (uptime), payment methods, and pricing of EVSE.
 - Outreach and engagement materials that provide information on EVs and EVSE, such as technical assistance on operation, EV costs as compared to gas-powered automobiles, EV incentives for MFH residents, and integrated outreach materials from SMAQMD on car share.
- Provide a copy of the *Draft Community Engagement Plan* to the CAM.
- Revise the Draft version into a *Final Community Engagement Plan*, incorporating feedback from the CAM.
- Implement the *Final Community Engagement Plan* by the following actions, including, but not limited to:
 - Collecting EV awareness feedback from residents twice, prior to project initiation and prior to conclusion of the project.

- Providing information to MFH residents through a variety of media and opportunities for resident input, including at least one in-person event.
- Conducting focused outreach to residents to inform them of upcoming project and potential impacts on the MFH site and residents.
- Conducting an evaluation of resident satisfaction, availability (uptime), payment methods, and pricing of EVSE twice, six months after project installation and three months prior to conclusion of the project.
- Provide interim updates about implementation of the Community Engagement Plan in Quarterly Progress Reports to the CAM.
- Prepare a *Community Engagement Evaluation Report* that documents the results of the engagement effort and makes recommendations for future deployments. The *Community Engagement Evaluation Report* will include, but not be limited to:
 - An analysis of the results of the EV Awareness feedback to determine if understanding of EV/EVSE and attitudes regarding EV/EVSE (such as potential to adopt) changed.
 - An analysis of the results of the Evaluation of Resident Satisfaction to identify the successful and unsuccessful aspects of availability, payment methods and pricing.
 - Recommendations on community engagement approaches for scaling up the pilot project to a full implementation program.
- Provide a copy of the *Community Engagement Evaluation Report* to the CAM.

Products:

- Draft Community Engagement Plan
- Final Community Engagement Plan
- Community Engagement Evaluation Report

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

TASK 3 DESIGN AND ENGINEERING

The goal of this task is to create stamped design and engineering drawings and related items for the EV infrastructure construction project.

The Recipient shall:

- Create draft design and engineering drawings incorporating the civil and electrical design, specifying the EV hardware and network service.
- Conduct engineering review of draft drawings.
- Issue *Final Stamped Engineering Drawings and Related Information*, including, but not limited to, certificates with a narrative summary.
- Provide a copy of the *Final Stamped Engineering Drawings and Related Information* to the CAM.

Products:

- Final stamped engineering drawings and related information

TASK 4 CONSTRUCTION

The goal of this task is to implement construction of at least 108 charging stations at a minimum of six affordable MFH sites in Sacramento, serving 573 units. Targeted locations include, but are not limited to:

- Cornerstone, 4637 Underwood Way Sacramento, CA 95823
- MH on the Boulevard, 7351 Stockton Blvd. Sacramento, CA 95823
- River Garden, 2201 Northview Dr. Sacramento, CA 95833
- MH at the Highlands, 6010 34th St. North Highlands, CA 95660
- MH at Foothill Farms, 5324 Hemlock St. Sacramento, CA 95841
- Glen Ellen MH Community, 2394 Glen Ellen Cir. Sacramento, CA 95822

The Recipient shall:

- Construct civil and electrical infrastructure.
- *Provide Photos of Civil and Electrical Infrastructure Installation* to the CAM.
- Install at least 108 level 2 charging stations at a minimum of six affordable MFH sites in Sacramento County.
- *Provide Photos of Completed EVSE Installation* to the CAM.
- Commission EVSE and network services.
- Provide a *Commissioning Report* to the CAM.
- Provide resident support for operation questions and site host support for maintenance.
- Submit an *AB 841 Certification* to the CAM that certifies the project has complied with all AB 841 (2020) requirements specified in the Agreement Terms and Conditions or describes why the AB 841 requirements do not apply to the project. The certification shall be signed by Recipient's authorized representative.
- Submit *EVITP Certification Numbers* of each Electric Vehicle Infrastructure Training Program certified electrician that installed electric vehicle charging infrastructure or equipment to the CAM. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.
- Train site hosts to provide basic MFH resident support on EVSE usage, such as accessing operation guidance, question and answer documents and contacts for more advanced support.
- Provide *Documentation of Site Hosts Training* to the CAM.

Products:

- Photos of civil and electrical infrastructure installation
- Photos of EVSE installation
- Commissioning report

- AB 841 Certification and EVITP Certification Numbers
- Documentation of site hosts training

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

TASK 5 OPERATIONS AND MAINTENANCE

The goal of this task is to operate the EVSE for 12 months to allow data gathering and analysis for Tasks 2 and 6 and to use that analysis to propose a Scalability Plan for deploying MFH EVSE focused on low-income residents across the Sacramento region. Additionally, the goal of this task is to ensure that the chargers installed in the project are operational at least 97 percent of a charging site's standard hours of operation for five years after commissioning.

Task 5.1 Operations

The Recipient shall:

- Establish and operate a reservation and payment system for MFH residents use of the EVSE.
- Provide a *Written Description of the Reservation and Payment System* to the CAM.
- Provide technical support to residents of the MFH to utilize the EVSE.
- Provide technical support to MFH site host for operation and maintenance.
- Provide *Summaries of Resident Technical Assistance* in Quarterly Reports to the CAM.
- Operate the installed charging stations during the term of this agreement.
- Ensure that the chargers installed in the project are operational at least 97 percent of a charging site's standard hours of operation for five years after commissioning. Without limitation to other rights and remedies which the CEC may have, including but not limited to survival provisions specified in the Terms and Conditions of this agreement, this requirement to ensure operability for five years after commissioning shall survive the completion or termination date of this agreement. In addition to other requirements in the Terms and Conditions of this agreement, all CEC-reimbursable expenditures must be incurred within the agreement term.

Products:

- Written description of reservation and payment system
- Summaries of resident technical assistance

Task 5.2 Maintenance

The Recipient shall:

- Perform regular preventive maintenance, including visual inspection, performance testing, functional validation, and reporting.
- Monitor network performance.
- Dispatch maintenance technicians in a timely manner and address malfunctions and repairs within 48 hours of initial notice.
- Provide charging station users with 24/7 call center service that will assist users with any technical issues encountered at the stations.
- Prepare a *Stations Operations Report* for each project site sent quarterly to the CAM after station commissioning through the term of this agreement. The report will include a

summary of uptime measures, calculation of uptime, and number of dispatch events needed during the quarter.

Product:

- Stations Operations Reports delivered with the Quarterly Progress Reports described in Task 1.5

Task 5.3 Recordkeeping and Reporting

The Recipient shall:

- Keep and maintain a *Record of the Standard Hours of Operation* for each site, including any changes over the operational period.
- Keep and maintain detailed Records of Maintenance and Repairs. Records shall include, but are not limited to:
 - Whether the maintenance was scheduled preventive maintenance or response to an identified issue
 - Date that the need for corrective maintenance was reported, if applicable
 - Date that the maintenance was completed
 - Narrative describing nature of maintenance required
 - Any component failures / replacements
- Keep and maintain a *Record of the Operative Status of Each Connector* from the time the equipment is commissioned until the end of the operational period defined by this agreement.
 - The record shall include, but is not limited to, any time the Recipient knows or is notified that a connector is incapable of delivering a charge, for example by observation, by receipt of a service call, by notice of power outage or telecommunications outage, or other means.
 - For any networked chargers, Recipient shall record the time and the operative status of each connector every 15 minutes.
 - For example, a central system using OCPP 1.6 could send `TriggerMessage.req`, `'requestedMessage' = 'StatusNotification'` and record both the `TriggerMessage.conf` and `StatusNotification.req` sent by the charge point in response.
 - Excluded downtime shall be recorded via the ticket management portal available within the SKY platform. The record shall include an explanation of the cause of the downtime, why it should be considered excluded downtime, and the efforts made to minimize the downtime.
- Make these records available, in a standard electronic format of the CEC's choosing, to the CEC within 10 business days of a written request by the CAM.
- Without limitation to other rights and remedies which the CEC may have, including but not limited to survival provisions specified in the Terms and Conditions of this agreement, the requirements for recordkeeping and reporting under this Task shall remain in effect for five years after commissioning and shall survive the completion or termination date of this agreement. In addition to other requirements in the Terms and Conditions of this agreement, all CEC-reimbursable expenditures must be incurred within the agreement term.

- The requirements for recordkeeping and reporting under this Task are in addition to requirements specified in this Agreement's Terms and Conditions, section 18.b, Retention of Records, and any other applicable Terms and Conditions.

Products:

- Record of standard hours of operation
- Records of maintenance and repairs
- Record of the operative status of each connector

Task 5.4 Definitions

- a) Central System: The central system that communicates with one or more chargers, for example, to authorize users, monitor charger status, and/or collect, transmit, record, and manage other information.
- b) Connector: A connector is what is plugged into a vehicle to charge it.
- c) Charging Site: A physical location with one or more chargers.
- d) Charger: A device that safely supplies electrical power to an electric vehicle through connectors. Where a device has multiple connectors or can serve multiple parking spaces, the number of chargers is equal to the number of vehicles that can be simultaneously charged.
- e) Downtime: Any period of time within the standard hours of operation in which a charger is not operational.

For networked chargers, a period in which the charge point's response to the central system's request for notification of operative status indicates that the connector or charge point is in an inoperative state is downtime.

- For example, in OCPP 1.6 intervals when **StatusNotification.req** protocol data unit **Status Field** = 'Unavailable' or 'Faulted' OR **errorCode Field** = 'ConnectorLockFailure', 'GroundFailure', 'HighTemperature', 'InternalError', 'OverCurrentFailure', 'OverVoltage', 'PowerMeterFailure', 'PowerSwitchFailure', 'ReaderFailure', 'ResetFailure', or 'UnderVoltage' are "downtime."
- f) Excluded downtime: A period of downtime, within the standard hours of operation, caused by any of the following:
 - **Electric Grid Power Loss:** Power supplied by the electric utility for a site is not supplied at levels required to for minimum function of chargers / station. This may include, but is not limited to, service outages due to utility equipment malfunction or public safety power shut-offs.
 - **Accident, Vandalism or Theft:** Physical damage to the charger for events such as vehicle collision with a charger, theft of charging cables, damage to connectors from mishandling, damage to screens, excessive wear and tear and the improper installation, connection, maintenance, or repair of a Charging Unit.
 - **Telecommunication Network Outages:** Loss of communication between a charger and a central system due to cellular or internet service provider system outages that are beyond the control of the Recipient.
 - **Planned Outage for Maintenance or Upgrade:** Any planned maintenance indicated in the funding Recipient's Operations and Maintenance Plan, submitted with application for funding, or an updated Plan approved by the CAM in advance of the planned outage.

- **Extraordinary Events:** Unforeseeable events that would have been impossible to plan for using commercially reasonable methods.
- g) **Operational:** A charging port is considered operational when its hardware and software are both online and available for use, or in use, and the charging port successfully dispenses electricity as expected.
- h) **Uptime:** Uptime is calculated as:

$$\text{Uptime} = \frac{\text{Total Standard Hours of Operation} - \text{Downtime} + \text{Excluded Downtime}}{\text{Total Standard Hours of Operation}} * 100\%$$

Task 5.5 Scalability Plan

- Analyze community engagement results (Task 2) and operational data from the project (Task 6).
- Prepare a *Scalability Plan* for scaling up the pilot deployment to a program supplying EV and EVSE to low-income Sacramento MFH residents, including an evaluation of the role of SMAQMD car share in EVSE utilization and EV adoption.
- Provide a copy of the *Scalability Plan* to the CAM.

Products:

- Scalability Plan

TASK 6 DATA COLLECTION AND ANALYSIS

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

The Recipient shall:

- Develop data collection plan for deployed charging equipment.
- Troubleshoot any issues identified.
- Collect and provide the following *Data on Charging Installations and Charging Events*, to be provided to the CAM in the Quarterly Progress Reports:
 - Number, type, date, and location of chargers installed.
 - Nameplate capacity of the installed equipment, in kW for chargers.
 - Number and type of outlets per charger.
 - Location type, such as street, parking lot, hotel, restaurant, or multi-unit housing.
 - Total cost per charger and the subsidy from the CEC per charger.
 - EV adoption of residents in the MFH served by the project (before project begins until end of project).
 - Success rate of property recruitment.
 - Number of MFH units served by project.

- Number of MFH units in disadvantaged or low-income communities.
 - Number of affordable housing units.
- Collect and provide 12 months of throughput, usage, and operations data from the project including, but not limited to:
 - Number of charging sessions
 - Average charger downtime
 - Peak power delivered (kW)
 - Duration of active charging, hourly
 - Duration of charging session, hourly (e.g., vehicle parked but not actively charging)
 - Average session duration
 - Energy delivered (kWh)
 - Average kWh dispensed
 - Number of unique users using the charging equipment
 - Applicable price for charging
 - Payment method for public charging
 - Normal operating hours, uptime, downtime, and explanations of variations
 - Gallons of gasoline and/or diesel fuel displaced (with associated mileage information)
 - Expected air emissions reduction, for example:
 - Carbon dioxide
- Identify any current and planned use of renewable energy.
- Provide data on potential job creation, economic development, and increased state revenue as a result of the project and any expected future expansion.
- Provide a quantified estimate of the project's carbon intensity values for life-cycle greenhouse gas emissions.
- Compare any project performance and expectations provided in the proposal to CEC with actual project performance and accomplishments.
- Submit the data described above electronically in a quarterly progress report throughout the duration of the agreement.
- Perform an *Analysis* of all the collected data and information described above and include the *Analysis* in the Final Report.

Products:

- Data on charger installations and charging events will be submitted electronically in Quarterly Progress Reports
- Analysis of all data and information collected will be included in the Final Report

TASK 7 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) of pre and post technology installation at the project sites or related project photographs.

Products:

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

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION: Sacramento Municipal Utility 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 ZVI-22-013 with Sacramento Municipal Utility District for a \$2,229,000 grant to deploy 108 Level 2 charging stations across 6 multi-family housing sites located in disadvantaged and low-income communities; and

FURTHER BE IT RESOLVED, that the Executive Director or their 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 September 14, 2022.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Liza Lopez
Secretariat