



**California Energy Commission
02-15-2023 Business Meeting
Backup Materials for Agenda Item No 03ciii:
EV Charging Solutions, Inc.**

The following backup materials for the above-referenced agenda item are available in this PDF packet as listed below:

1. Proposed Resolution (attached below).
2. Grant Request Form or Grant Amendment Request Form or Contract Request Form or Loan Request Form (applicable form attached below).
3. Scope of Work (attached below).
4. CEQA documents (if applicable, attached below).
5. Other relevant documentation or link to other documentation (if applicable, attached below).

STATE OF CALIFORNIA
STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION: EV Charging Solutions, 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 ZVI-22-031 with EV Charging Solutions, Inc. for a \$668,800 grant to install 10 DCFC and three Level 2 chargers at two rural locations in Central California; 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 February 15, 2023.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Liza Lopez
Secretariat



GRANT REQUEST FORM (GRF)

A. New Agreement Number

IMPORTANT: New Agreement # to be completed by Contracts, Grants, and Loans Office.

New Agreement Number: ZVI-22-031

B. Division Information

1. Division Name: Fuels and Transportation Division
2. Agreement Manager: Daniel Siu
3. MS-27
4. Phone Number: 916-908-7483

C. Recipient's Information

1. Recipient's Legal Name: EV Charging Solutions, Inc.
2. Federal ID Number: 83-1537952

D. Title of Project

Title of project: EVCS Shafter Community and Surrounding Area DCFC

E. Term and Amount

1. Start Date: 2/15/2023
2. End Date: 6/30/2025
3. Amount: \$668,800

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 2/15/2023
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name: Daniel Siu
5. Time Needed for Business Meeting: 0 minutes.
6. The email subscription topic is: Clean Transportation Program

Agenda Item Subject and Description:

EV Charging Solutions, Inc. Proposed resolution approving Agreement ZVI-22-031 with EV Charging Solutions, Inc. for a \$668,800 grant to install 10 DCFC and three Level 2 chargers at two rural locations in Central California, and adopting staff's determination that this action is exempt from CEQA. (General Fund Funding) Contact: Daniel Siu. Staff presentation: 5 minutes.

G. California Environmental Quality Act (CEQA) Compliance

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

Yes

If yes, skip to question 2.

If no, complete the following (PRC 21065 and 14 CCR 15378) and 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: If Agreement is considered a "Project" under CEQA answer the following questions.



a) Agreement **IS** exempt?

Yes

Statutory Exemption?

No

If yes, list PRC and/or CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

PRC section number: None

CCR section number: None

Categorical Exemption?

Yes

If yes, list CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

CCR section number: 15301, 15303, 15304.

Cal. Code Regs., tit. 14, sec. 15301 provides that projects which consist of the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, and which involve negligible or no expansion of use beyond that existing at the time of the lead agency's determination, are categorically exempt from the provisions of the California Environmental Quality Act. This project involves installation of electric vehicle charging stations at two existing parking facilities. The electric vehicle charging station will be installed on an existing paved parking lot and will involve negligible or no expansion of use. Therefore, the project falls within section 15301 and will not have a significant effect on the environment.

Cal. Code Regs., tit. 14, sec. 15303 provides that projects which consist of construction and location of limited numbers of new, small facilities or structures; installation of small new equipment and facilities in small structures; and the conversion of existing small structures from one use to another where only minor modifications are made in the exterior of the structure, are categorically exempt from the provisions of CEQA. This project consists of installation of new small equipment to an existing site. Three Level 2 chargers and ten DCFC will be installed. Specifically, the Tritium fast charging equipment to be installed is approximately half the size of a phone booth and the Level 2 charging equipment is the size of a parking meter. The equipment will be installed in an existing, paved parking lot. Therefore, the project falls within section 15303 and will not have a significant effect on the environment.

Cal. Code Regs., tit. 14, sect. 15304 provides that projects which consist 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 and agricultural purposes are categorically exempt from the provisions of CEQA. There will be a small amount of dust during the 2-4 week construction period. Minimum trenching in a ground level parking lot will be required for this project. No trenching will be required for locations with a multi-level parking structure. The trenching will take place on currently paved ground, will not involve the removal of



any trees, and surface will be restored. Therefore, the project falls within section 15304 and will not have a significant effect on the environment.

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

No

If yes, explain reason why Agreement is exempt under the above section. If no, enter "Not applicable" and go to the next section.

Not Applicable

b) Agreement **IS NOT** exempt.

IMPORTANT: consult with the legal office to determine next steps.

No

If yes, answer yes or no to all that applies. If no, list all as "no" and "None" as "yes".

Additional Documents	Applies
Initial Study	No
Negative Declaration	No
Mitigated Negative Declaration	No
Environmental Impact Report	No
Statement of Overriding Considerations	No
None	Yes

H. Subcontractors

List all Subcontractors listed in the Budget (s) (major and minor). Insert additional rows if needed. If no subcontractors to report, enter "No subcontractors to report" and "0" to funds.

Delete any unused rows from the table

Subcontractor Legal Company Name	CEC Funds	Match Funds
Clean Fuel Connection, Inc. (CFCI)	\$256,800	\$147,136
The Energy Coalition	\$0	\$20,064
Imperial Electric (CFCI Subcontractor)	\$95,130	\$12,264
Ambient Electric (CFCI Subcontractor)	\$90,020	\$0
MD7, LLC (CFCI Subcontractor)	\$0	\$25,000

I. Vendors and Sellers for Equipment and Materials/Miscellaneous

List all Vendors and Sellers listed in Budget(s) for Equipment and Materials/Miscellaneous. Insert additional rows if needed. If no vendors or sellers to report, enter "No vendors or sellers to report" and "0" to funds. **Delete** any unused rows from the table.

Vendor/Seller Legal Company Name	CEC Funds	Match Funds
Tritium Technologies LLC	\$400,000	\$0



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 10/2022)

Noodoe Inc.	\$12,000	\$0
Square D (CFCI Equipment)	\$0	\$50,000
Millbank (CFCI Equipment)	\$0	\$15,000

J. Key Partners

List all key partner(s). Insert additional rows if needed. If no key partners to report, enter "No key partners to report." **Delete** any unused rows from the table.

Key Partner Legal Company Name

K. Budget Information

Include all budget information. Insert additional rows if needed. If no budget information to report, enter "N/A" for "Not Applicable" and "0" to Amount. **Delete** any unused rows from the table.

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
General Fund	FY 21/22	601.129ZEV	\$668,800

TOTAL Amount: \$668,800

R&D Program Area:

Explanation for "Other" selection

Reimbursement Contract #:

Federal Agreement #:

L. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Jessie Guo

Address: 11800 Clark Street

City, State, Zip: Arcadia, CA 91006

Phone: (626) 689-8901

E-Mail: jessieyyg@evcs.com

2. Recipient's Project Manager

Name: Sabrina Sandoval

Address: 11800 Clark Street

City, State, Zip: Arcadia, CA 91006

Phone: (323) 839-0395

E-Mail: ssandoval@evcs.com



M. Selection Process Used

There are three types of selection process. List the one used for this GRF.

Selection Process	Additional Information
Competitive Solicitation #	GFO-21-604
First Come First Served Solicitation #	Not applicable
Other	Not applicable

N. Attached Items

1. List all items that should be attached to this GRF by entering "Yes" or "No".

Item Number	Item Name	Attached
1	Exhibit A, Scope of Work/Schedule	Yes
2	Exhibit B, Budget Detail	Yes
3	CEC 105, Questionnaire for Identifying Conflicts	Yes
4	Recipient Resolution	No
5	Awardee CEQA Documentation	Yes

Approved By

Individuals who approve this form must enter their full name and approval date in the MS Word version.

Agreement Manager: Daniel Siu

Approval Date: 12/29/2022

Office Manager: Elizabeth John

Approval Date: 12/29/2022

Deputy Director: Melanie Vail

Approval Date: 1/9/2023

Exhibit A SCOPE OF WORK

TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2		Design and Engineering Plan
3	X	Charger Procurement and Pre-Installation Work
4	X	Installation and Commissioning
5		Operations and Maintenance
6	X	Local Engagement and Outreach
7		Data Collection and Analysis
8		Project Fact Sheet

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Sabrina Sandoval & Jessie Guo – EV Charging Solutions, Inc. (EVCS)		
2	Aaron Hardy – Clean Fuel Connection, Inc. (CFCI)		
3	Ian Vishnevsky – EVCS Aaron Hardy - CFCI		TRITIUM Technologies LLC, Noodoe Inc.
4	Aaron Hardy - CFCI & George Ivanov - EVCS		
5	George Ivanov - EVCS		
6	Enid Joffe - CFCI	The Energy Coalition (TEC)	
7	Sabrina Sandoval - EVCS		
8	Sabrina Sandoval - EVCS		

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
CBO	Community-Based Organization
CEC	California Energy Commission
CFCI	Clean Fuel Connection, Inc
CPR	Critical Project Review
CTP	Clean Transportation Program
DCFC	Direct Current Fast Charger
EV	Electric Vehicle
EVCS	EV Charging Solutions, Inc.
EVSE	Electric Vehicle Supply Equipment
FTD	Fuels and Transportation Division
Recipient	EV Charging Solutions, Inc.
STA	Solano Transportation Authority
TEC	The Energy Coalition

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 December 14, 2021, the California Energy Commission (CEC) released a Grant Funding Opportunity (GFO) entitled “Rural Electric Vehicle (REV) Charging.” This competitive grant solicitation was to demonstrate replicable and scalable business and technology models for deployment of public electric vehicle (EV) charging infrastructure capable of maximizing access and EV travel for rural residents. In response to GFO-21-604, the Recipient submitted application #21 which was proposed for funding in the CEC’s Notice of Proposed Awards on June 24, 2022, and First Revised Notice of Proposed Awards on August 3, 2022. GFO-21-604 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:

Rural communities, especially those that are low-income, underserved and/or disadvantaged, often have insufficient charging infrastructure to meet the needs of the growing EV consumer population. Charging infrastructure must be readily available to support EV adoption in California's rural communities.

Goals of the Agreement:

The goal of this agreement is to demonstrate replicable and scalable business and technology models that can deploy EV charging stations to serve rural residents, especially those in low-income, underserved and disadvantage communities. By increasing access to charging infrastructure for rural residents, current EV owners will be supported with reliable, convenient local charging with the hope of reducing concerns about range limitations and incentivize non-EV owners to consider EV options with the increased access to charging in their communities.

Objectives of the Agreement:

The objectives of this agreement are to successfully install at least 10 direct current fast chargers (DCFC) and three Level 2 chargers at two locations in Central California and conduct outreach to engage residents in benefits of EV adoption. In doing so, this project aims to expand the EV charging infrastructure available to rural residents while helping to reduce California's use and dependence on petroleum transportation fuels.

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 and is limited to 25-pages. 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 Final Report in Microsoft Word format or similar electronic format as approved by the CAM.

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 DESIGN AND ENGINEERING PLAN

The goal of this task is to provide detailed site plans for each of the two sites showing where the charging unit(s) will be located, and any necessary electrical or accessibility improvements.

The Recipient shall:

- Complete a site visit to each project location.
- Confirm selection of charger type(s) for each site and obtain cost estimates.
- Design *Site Plans* outlining the location of the charger(s) and provide copies of the Site Plans to the CAM.
- Coordinate with certified electricians and utility provider to determine electricity capacity for each site and provide copies of *Electrical Load Calculations Worksheets* to the CAM.
- Prepare *Electrical Plan Diagrams* for each site showing the current and/or proposed electrical systems for charger installations and provide copies to the CAM.

Products:

- Site Plans
- Electrical Load Calculations Worksheets
- Electrical Plan Diagrams

TASK 3 CHARGER PROCUREMENT AND PRE-INSTALLATION WORK

The goal of this task is to acquire at least ten DCFCs and at least three Level 2 charging stations to be spread across two sites and complete all necessary utility upgrades determined by certified electricians and utility providers.

The Recipient shall:

- Finalize equipment specifications and Equipment List.
- Submit *Final Equipment List* to the CAM.
- Finalize *Schedule for EVSE Delivery* and provide a copy to the CAM.
- Submit *EVSE Purchase Order(s)* and provide copy(ies) to the CAM.
- Receive EVSE.
- Provide *High-Quality Photos of Received EVSE* (labeled with unique identification numbers) to the CAM.
- Coordinate scheduling of installation with each site host.
- Schedule all necessary contract work with utility company and electricians for installation of new service and wiring at each site. Provide a copy of the proposed *Schedule of Utility Upgrades and Electrical Work* for the project to the CAM.

Products:

- Final Equipment List
- Schedule for EVSE Delivery
- EVSE Purchase Order(s)
- High Quality Photos of Received EVSE
- Schedule of Utility Upgrades and Electrical Work

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

TASK 4 INSTALLATION AND COMMISSIONING

The goal of this task is to install and commission at least ten DCFCs and at least three Level 2 charging stations across two sites, including power source connection, wiring and testing.

The Recipient shall:

- Secure the construction area.
- Install charging unit(s) per manufacturer instructions and construction plans.
- Inspect and test EVSE and networking software.
- Provide *High Quality Photos of completed construction and each Installed EVSE* (labeled with unique identification numbers) to the CAM.
- Request inspection from the building inspection office.
- Commission EVSE and provide *Commissioning Report* detailing the activities of commissioning and reporting recommendations for post-construction plans to the CAM.

- Submit an *AB 841 Certification* 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. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

Products:

- High Quality Photos of completed construction and of each Installed EVSE
- Commissioning Report
- AB 841 Certification
- EVITP Certification Numbers
- **[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 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:

- 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.

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, but not limited to, 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 and time the need for corrective maintenance was reported, if applicable
 - Date and time maintenance began
 - Date and time 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, including, but not limited to, any supporting documentation from an independent party, e.g., notice from an electric utility of a power outage or police report of vandalism. 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 CEC.
- 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 the standard hours of operation
- Record of the operative status of each connector
- Records of maintenance and repairs

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, and damage to screens. Excluded downtime is limited to a maximum of 5 days for each event.
 - **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 6 LOCAL ENGAGEMENT AND OUTREACH

The goal of this task is to engage residents, businesses, organizations, community members, and targeted site hosts to promote, build awareness and expand adoption of EVs.

The Recipient shall:

- Conduct outreach and engagement activities to develop materials for distribution (e.g., flyers, brochures, presentations, web content, social media content, press releases) as well as lead all indirect and direct marketing efforts.
- Develop outreach materials including but not limited to:
 - Fueling and general transportation overview summarizing the fueling and alternative fueling opportunities in the area
 - Educational information on EVs including vehicle types and general EV ownership
 - Benefits and economics of EVs including EV incentives and cost-saving actions (e.g. rebates, lower costs of production and refueling, etc.)
 - EV infrastructure and the differences between Level 1, Level 2, and DCFC
 - EVs in the community including the collective impacts and shared

community benefits such as health and emission reduction benefits

- Provide a *Copy of Outreach Materials* to the CAM.
- Create a *Schedule of Targeted Events*, webinars, community-based outreach, etc. and provide a copy to the CAM.
- Develop and distribute communication resources to engage local residents, businesses, organizations, community members, and targeted site hosts.
- Distribute materials regarding project via email newsletters, social media, in-person community events.
- Develop a *List of Associations or community-based organizations (CBOs)* for outreach support. Submit a copy of the list to the CAM.
- Coordinate with associations and CBOs to distribute project materials.

Products:

- Copy of Outreach Materials
- Schedule of Targeted Events
- List of Associations or CBOs

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

TASK 7 DATA COLLECTION AND ANALYSIS

The goal of this task is to collect operational data from the project and to analyze that data for economic and environmental impacts.

The Recipient shall:

- Develop a *Data Collection Plan* for deployed charging equipment and submit the plan to the CAM for review.
- Troubleshoot any issues identified.
- For all electric vehicle chargers and charging stations installed on or after January 1, 2024:
 - Comply with recordkeeping and reporting standards as described in CEC's regulations. These requirements are not applicable to those electric vehicle chargers and charging stations installed at residential real property containing four or fewer dwelling units.
 - Comply with all industry best practices and charger technology capabilities that are demonstrated to increase reliability, as described in CEC's regulations.
 - Without limitation to other requirements in this grant agreement, Recipient shall comply with any other regulatory requirements, including but not limited to uptime requirements and operation and maintenance requirements. Such regulatory requirements may, but will not necessarily, be enacted after execution of this grant agreement. Once regulations are final, they will apply to work under this grant agreement irrespective of when finalized. Any

- updates to regulations may also be applicable to work under this grant agreement.
- If the Recipient is an electric vehicle service provider or other third-party entity that is not the site host, the electric vehicle service provider or third-party entity shall provide a disclosure to the site host about the site host's right to designate the service provider or third-party as the entity to report the data on behalf of the site host. The Recipient shall verify receipt by signing the disclosure.
 - Collect and provide the following *Data on charger installations*:
 - 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, the subsidy from the CEC per charger, federal subsidy per charger, utility subsidy per charger, and privately funded share per charger.
 - Collect and provide, for 12 months, the following *Data on charging events* - 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
 - Types of vehicles using the charging equipment
 - Applicable price for charging, including but not limited to: electric utility tariff, electric vehicle service provider service contract, or public charger price
 - Payment method for public charging
 - Energy delivered back to grid or facility if a bidirectional charging use case (kWh)
 - 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:

- Non-methane hydrocarbons
 - Oxides of nitrogen
 - Particulate Matter
 - Formaldehyde
- Identify any current and planned use of renewable energy.
- Describe any energy efficiency measures used that may exceed Title 24 standards in Part 6 of the California Code of Regulations.
- 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.
- Collect and submit data, information, and analysis described above electronically and include in the Quarterly Progress Reports.

Products:

- Data collection plan
- Data on charger installations and charging events will be submitted electronically in Quarterly Progress Reports
- Data collection information and analysis

TASK 8 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