



**CALIFORNIA  
ENERGY COMMISSION**



**California Energy Commission  
April 10, 2025 Business Meeting  
Backup Materials for Current Trucking LLC**

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

1. Proposed Resolution
2. Grant Request Form
3. Scope of Work

**[PROPOSED]**

**RESOLUTION NO: 25-0410-03k**

**STATE OF CALIFORNIA**

**STATE ENERGY RESOURCES  
CONSERVATION AND DEVELOPMENT COMMISSION**

**RESOLUTION: Current Trucking LLC**

**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 EPC-24-046 with Current Trucking LLC for a \$2,500,000 grant. This agreement will demonstrate an innovative load control management system and efficient medium-voltage power distribution system at an electric truck charging facility in San Bernardino County. The project will demonstrate the feasibility of adjusting commercial charging loads within local distribution grid constraints to increase utilization of existing grid infrastructure, reduce costs, and shorten energization timelines; 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 April 10, 2025.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

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Kristine Banaag  
Secretariat



## GRANT REQUEST FORM (GRF)

### A. New Agreement Number

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

**New Agreement Number:** EPC-24-046

### B. Division Information

1. Division Name: ERDD
2. Agreement Manager: Katelynn Dinius
3. MS-:43
4. Phone Number: 916-776-3468

### C. Recipient's Information

1. Recipient's Legal Name: Current Trucking LLC
2. Federal ID Number: 86-1447567

### D. Title of Project

Title of project: Valley Charging Center for Flexible Transport Electrification

### E. Term and Amount

1. Start Date: 5/1/2025
2. End Date: 12/31/2027
3. Amount: \$2,500,000.00

### F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
2. The Proposed Business Meeting Date: 4/10/2025
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name: Katelynn Dinius
5. Time Needed for Business Meeting: 0 minutes.
6. The email subscription topic is: EPIC (Electric Program Investment Charge).

#### **Agenda Item Subject and Description:**

**Current Trucking LLC.** Proposed resolution approving agreement EPC-24-046 with Current Trucking LLC for a \$2,500,000 grant, and adopting staff's recommendation that this action is exempt from CEQA. This agreement will demonstrate an innovative load control management system and efficient medium-voltage power distribution system at an electric truck charging facility in San Bernardino County. The project will demonstrate the feasibility of adjusting commercial charging loads within local distribution grid constraints to increase utilization of existing grid infrastructure, reduce costs, and shorten energization timelines. (EPIC Funding)  
Contact: Katelynn Dinius

### 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:

**2. 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:

CCR section number: CCR section number 1, CCR section number 2. Or, 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: Cal. Code Regs., tit. 14, sections 15301, 15303, and 15304

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.

California Code of Regulations, Title 14, Section 15301 provides that projects consisting of the 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 existing or former use, are categorically exempt from CEQA. The proposed charging sites are either existing developed sites or vacant lots that will be prepared for EV charging infrastructure. The Rancho Site will involve limited grading with gravel installation for parking and charging areas, avoiding major site impacts. The Bloomington Site, while currently vacant, will undergo grading, cut and fill, concrete work for equipment pads, and asphalt paving to support the charging infrastructure. Limited trenching will occur at the Bloomington Site for electrical conduit, while the Rancho Site will utilize surface-mounted chargers on precast concrete skids, eliminating subsurface installation. These activities involve negligible or no expansion of existing or former use and will not result in significant environmental impacts, qualifying the project under Section 15301.

Cal. Code Regs., tit. 14, section 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. The Bloomington Site will require some site grading, cut and fill, concrete work for equipment pads and foundations, and asphalt paving for the charging infrastructure. The Rancho Site will have limited grading and will include the installation of gravel for the parking and charging areas to minimize site impacts. This project will install five (5) 360kW power cabinets, fifteen (15) DC dispensers, and a transformer and electrical switchgear at the selected demonstration site. For these reasons, the project falls within section 15303 and will not have a significant impact on the environment.

Cal. Code Regs., tit 14, section 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 the removal of health, mature, scenic trees except for forestry and agricultural purposes are categorically exempt from the provisions of CEQA. In this project, both potential demonstration sites will require limited grading and will include the installation of asphalt or gravel for the parking and charging areas. The Bloomington Site will require subsurface conduit to feed the chargers across the property. At the Rancho Site, the chargers will be surface-mounted on precast concrete skids which include embedded conduit. These skids will sit on the grade and will not include any sub-surface installation. Limited trenching or piping will be required for either site. There will be no removal of healthy nature or scenic nature. Therefore, this project falls within section 15303 and will not have a significant impact on the environment.

The demonstration project will not impact an environmental resource of hazardous or critical concern where designated, precisely mapped, and officially adopted pursuant to law by federal, state, or local agencies; does not involve any cumulative impacts of successive projects of the same type in the same place that might be considered significant; does not involve unusual circumstances that might have a significant effect on the environment; will not result in damage to scenic resources within a highway officially designated as a state scenic highway; the project site is not included on any list compiled pursuant to Government Code section 65962.5; and the project will not cause a substantial adverse change in the significance of a historical resource. Therefore, none of the exceptions to categorical exemptions listed in CEQA Guidelines section 15300.2 apply to this project, and this project will not have a significant effect on the environment. Based on supporting regulatory determinations, the project is exempt from CEQA review.

For these reasons, the proposed work will not have any significant effect on the environment and falls under sections 15301, 15303, and 15304.

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. Is this project considered "Infrastructure"?

Yes

#### I. 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
Chateau Development, LLC	\$ 0	\$ 105,998
Electric Power Research Institute, Inc.	\$ 175,000	\$ 0
Gladstein, Neandross & Associates LLC	\$ 145,358	\$ 24,440
The Coalition for Clean Air	\$ 99,917	\$ 0

#### J. 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
General Contractor (TBD)	\$ 0	\$ 836,836
Electrical Contractor (TBD)	\$ 0	\$ 568,976
Civil Contractor (TBD)	\$ 0	\$ 838,226
Howard Industries, Inc.	\$ 294,000	\$ 0
S & C Electric Company	\$ 400,000	\$ 0
Myers Power Products, Inc.	\$ 250,000	\$ 0
Schneider Electric USA, Inc.	\$ 125,000	\$ 0
Siemens Industry, Inc.	\$ 153,440	\$ 0



Load Management Software Supplier (TBD)	\$ 15,525	\$ 0
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### K. 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
No key partners to report

### L. 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
EPIC	23-24	301.001K	\$ 2,500,000

**TOTAL Amount:** \$ 2,500,000

R&D Program Area: ESB: Transportation

Explanation for "Other" selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: Not applicable

### M. Recipient's Contact Information

#### 1. Recipient's Administrator/Officer

Name: Jessica Shih

Address: 50 Headquarters Plaza, North Tower, 9th Floor 1

City, State, Zip: Morristown, CA 07960

Phone: 908-456-7345

E-Mail: Shih@CurrentTrucking.com

#### 3. Recipient's Project Manager

Name: Jules Godino

Address: 50 Headquarters Plaza, North Tower, 9th Floor

City, State, Zip: Morristown, CA 07960

Phone: 908-578-1777

E-Mail: Godino@CurrentTrucking.com

### N. Selection Process Used

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



Selection Process	Additional Information
Competitive Solicitation #	GFO-23-306
First Come First Served Solicitation #	Not applicable
Other	Not applicable

## O. 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:** Katelynn Dinius

**Approval Date:** 02/28/2025

**Branch Manager:** Reynaldo Gonzalez

**Approval Date:** 02/28/2025

**Director:** Reynaldo Gonzalez for Jonah Steinbuck

**Approval Date:** 02/28/2025



**Exhibit A  
Scope of Work  
Current Trucking LLC**

**I. TASK ACRONYM/TERM LISTS**

**A. Task List**

Task #	CPR <sup>1</sup>	Task Name
1		General Project Tasks
2	X	Design
3		Vendor Selection
4		Permits and Approvals
5		Construction – Administration
6		Construction – Civil
7		Construction – Electrical
8		Construction – Fencing and Security
9	X	Commissioning
10	X	Operations and Data Collection
11		Community Outreach and Engagement
12		Evaluation of Project Benefits
13		Technology/Knowledge Transfer Activities

**B. Acronym/Term List**

Acronym/Term	Meaning
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
EV	Electric Vehicle
LCMS	Load Control Management System
TAC	Technical Advisory Committee

**II. PURPOSE OF AGREEMENT, PROBLEM/SOLUTION STATEMENT, AND GOALS AND OBJECTIVES**

**A. Purpose of Agreement**

The purpose of this Agreement is to develop and demonstrate an innovative Load Control Management System (LCMS) at an electric vehicle (EV) truck charging facility, leveraging advanced, high-efficiency medium-voltage power distribution systems. The project will demonstrate the feasibility of adjusting commercial charging loads within local distribution grid constraints to increase utilization of existing grid infrastructure, reducing costs and shortening energization timelines. Project results will highlight the effectiveness of this technology to the

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<sup>1</sup> Please see subtask 1.3 in Part III of the Scope of Work (General Project Tasks) for a description of Critical Project Review (CPR) Meetings.

# Exhibit A

## Scope of Work

### Current Trucking LLC

California Public Utilities Commission and the broader electric utility and commercial transportation sectors.

#### B. Problem/ Solution Statement

##### Problem

Today, electric utilities design distribution and transmission grid infrastructure to accommodate the coincident peak electrical demand on their systems. Coincident peaks, also known as system-wide peaks, occur when the electricity demand reaches its highest level across a specific region or system. By designing and building grid infrastructure to accommodate coincident peaks, electric utilities ensure system-wide reliability. However, for most of the year, utility grid infrastructure does not experience peak demand, and the utility grid is underutilized. Utilities have struggled to implement flexible load capacity programs due to the complexity of dynamically managing grid resources while maintaining system reliability and the challenges associated with updating traditional regulatory and approval processes.

##### Solution

This Agreement will demonstrate how a dynamic load management system can adjust high-power battery-electric truck charging loads within the operational parameters of the local distribution circuit. The project team will work with the utility provider on a flexible capacity agreement to support the demands of a medium- and heavy-duty battery electric truck charging facility and accommodate near-term peak demand. Scalable electrical infrastructure will be installed to enable future expansion, supporting over 250 battery electric trucks.

The dynamic load management system will connect to a local site meter and measure the total load on the site. By integrating real-time power data, the system will be able to dynamically balance charging loads across the facility. The system will also receive power information from the utility through developed communication channels. When the system detects an updated power limitation from the site operator or utility, it will immediately adjust and send new charging commands within seconds, optimizing load distribution and ensuring the site operates within its capacity limitations.

#### C. Goals and Objectives of the Agreement

##### Agreement Goals

The goals of this Agreement are to:

- Validate dynamic load management system capabilities.
- Demonstrate the operational and economic advantages of dynamic load management system and increase adoption through technology transfer activities.
- Demonstrate the efficiency of medium-voltage power distribution systems for EV charging facilities.
- Enable significant local emission and greenhouse gas reductions.
- Inform the future development of utility flexible capacity programs with the aim of simplifying and streamlining approval processes.

## Exhibit A Scope of Work Current Trucking LLC

1 Ratepayer Benefits:<sup>2</sup> This Agreement will benefit California IOU ratepayers by deferring  
2 distribution grid upgrades and increasing utilization of existing grid infrastructure. The project will  
3 participate in a utility flexible capacity program, which will enable the deployment of high-power  
4 DC fast chargers despite the distribution grid constraints that are present. Through the  
5 integration of dynamic load management, the charging facility will be able to leverage periods  
6 when the grid is underutilized and tap into excess capacity without compromising system  
7 reliability. The data collected from this demonstration will be used to inform the future  
8 development of utility flexible capacity programs with the aim of simplifying and streamlining  
9 approval processes.

10  
11 This Agreement will engage with electric utilities and share a detailed case study on the  
12 demonstration. The learnings from the demonstration will augment the team's active role in  
13 bringing together the electric utility and commercial transportation industries through programs  
14 aimed at scaling up electric vehicle adoption. The demonstration will serve as an early example  
15 of the innovative approaches available to charging infrastructure developers, commercial fleets,  
16 and commercial vehicle OEMs that can overcome the barriers to scaled charging infrastructure  
17 deployments.

18  
19 In addition to energy benefits, the demonstration will reduce local emissions and drive economic  
20 growth by creating jobs in construction, operations, and maintenance of electric vehicle  
21 infrastructure, positioning the region as a leader in clean transportation. The demonstration is  
22 expected to deliver a strong return on investment, supporting the transition to a sustainable  
23 transportation system and reducing charging costs for electric trucking.

24  
25 Technological Advancement and Breakthroughs:<sup>3</sup> This Agreement will lead to technological  
26 advancement and breakthroughs to overcome barriers to the achievement of the State of  
27 California's statutory energy goals by demonstrating the feasibility and safety of Load Control  
28 Management System (LCMS)-enabled EV charging facilities. The project will advance  
29 communication-based LCMS technology to enable more dynamic load control limits  
30 communicated by the utility. Existing LCMS solutions have the site operator and utility  
31 uncoupled. This project's LCMS will establish new communication pathways from the utility to  
32 the site. The initial phase will consist of an emailed file transfer which is then loaded into the  
33 system, with subsequent phases establishing network connectivity between the system and  
34 utility. This will allow grid stability as the utility will have the ability to make micro adjustments as  
35 often as necessary. A common use case is providing day-ahead notice of curtailing on  
36 anticipated high load periods, similar to how utilities remotely adjust a home's thermostat to  
37 lessen electrical demand. Utilities can then control EV charging locations en masse, being able  
38 to perform discrete circuit control. LCMS technologies and flexible interconnections have  
39 potential for lowering costs and accelerating energization of EV charging sites needed to meet

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<sup>2</sup> California Public Resources Code, Section 25711.5(a) requires projects funded by the Electric Program Investment Charge (EPIC) to result in ratepayer benefits. The California Public Utilities Commission, which established the EPIC in 2011, defines ratepayer benefits as greater reliability, lower costs, and increased safety (See CPUC "Phase 2" Decision 12-05-037 at page 19, May 24, 2012, [http://docs.cpuc.ca.gov/PublishedDocs/WORD\\_PDF/FINAL\\_DECISION/167664.PDF](http://docs.cpuc.ca.gov/PublishedDocs/WORD_PDF/FINAL_DECISION/167664.PDF)).

<sup>3</sup> California Public Resources Code, Section 25711.5(a) also requires EPIC-funded projects to lead to technological advancement and breakthroughs to overcome barriers that prevent the achievement of the state's statutory and energy goals.

## Exhibit A

### Scope of Work

### Current Trucking LLC

California's zero-emission vehicle goals. The project results will inform the commercial transportation industry and future statewide utility regulatory measures that can enable wider beneficial adoption of LCMS technologies and flexible interconnections.

#### **Agreement Objectives**

The objectives of this Agreement are to:

- Develop, test, and validate LCMS system interoperable with utility.
- Design, procure, construct, and commission a LCMS-enabled EV charging facility with medium-voltage power distribution system.
- Work with utility to operate charging capacity above the coincident peak capacity of the distribution circuit.
- Demonstrate efficient facility operation when LCMS is limiting power.
- Modify dynamic load management system to enable communication with utility.
- Provide prompt grid alert responses to utility.
- Operate the facility reliably, achieving a minimum 97% average annual uptime.
- Operate the facility efficiently, achieving a minimum 30% charger utilization rate.

### **III. TASK 1 GENERAL PROJECT TASKS**

#### **PRODUCTS**

##### **Subtask 1.1 Products**

The goal of this subtask is to establish the requirements for submitting project products (e.g., reports, summaries, plans, and presentation materials). Unless otherwise specified by the Commission Agreement Manager (CAM), the Recipient must deliver products as required below by the dates listed in the **Project Schedule (Part V)**. All products submitted which will be viewed by the public, must comply with the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973, as amended (29 U.S.C. Sec. 794d), and regulations implementing that act as set forth in Part 1194 of Title 36 of the Federal Code of Regulations. All technical tasks should include product(s). Products that require a draft version are indicated by marking “**(draft and final)**” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. With respect to due dates within this Scope of Work, “**days**” means working days.

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

##### For products that require a draft version, including the Final Report Outline and Final Report

- Submit all draft products to the CAM for review and comment in accordance with the Project Schedule (Part V). The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt, unless otherwise specified in the task/subtask for which the product is required.
- Consider incorporating all CAM comments into the final product. If the Recipient disagrees with any comment, provide a written response explaining why the comment was not incorporated into the final product.
- Submit the revised product and responses to comments within 10 days of notice by the CAM, unless the CAM specifies a longer time period, or approves a request for additional time.

## Exhibit A Scope of Work Current Trucking LLC

### For products that require a final version only

- Submit the product to the CAM for acceptance. The CAM may request minor revisions or explanations prior to acceptance.

### For all products

- Submit all data and documents required as products in accordance with the following:

### Instructions for Submitting Electronic Files and Developing Software:

#### ○ **Electronic File Format**

- Submit all data and documents required as products under this Agreement in an electronic file format that is fully editable and compatible with the California Energy Commission's (CEC) software and Microsoft (MS)-operating computing platforms, or with any other format approved by the CAM. Deliver an electronic copy of the full text of any Agreement data and documents in a format specified by the CAM, such as memory stick.

The following describes the accepted formats for electronic data and documents provided to the CEC as products under this Agreement, and establishes the software versions that will be required to review and approve all software products:

- Data sets will be in MS Access or MS Excel file format (version 2007 or later), or any other format approved by the CAM.
- Text documents will be in MS Word file format, version 2007 or later.
- Project management documents will be in Microsoft Project file format, version 2007 or later.

#### ○ **Software Application Development**

Use the following standard Application Architecture components in compatible versions for any software application development required by this Agreement (e.g., databases, models, modeling tools), unless the CAM approves other software applications such as open-source programs:

- Microsoft ASP.NET framework (version 3.5 and up). Recommend 4.0.
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5.
- Visual Studio.NET (version 2008 and up). Recommend 2010.
- C# Programming Language with Presentation (UI), Business Object and Data Layers.
- SQL (Structured Query Language).
- Microsoft SQL Server 2008, Stored Procedures. Recommend 2008 R2.
- Microsoft SQL Reporting Services. Recommend 2008 R2.
- XML (external interfaces).

Any exceptions to the Electronic File Format requirements above must be approved in writing by the CAM. The CAM will consult with the CEC's Information Technology Services Branch to determine whether the exceptions are allowable.

## **MEETINGS**

### **Subtask 1.2 Kick-off Meeting**

## Exhibit A Scope of Work Current Trucking LLC

The goal of this subtask is to establish the lines of communication and procedures for implementing this Agreement.

### **The Recipient shall:**

- Attend a “Kick-off” meeting with the CAM, and other CEC staff relevant to the Agreement. The Recipient’s Project Manager and any other individuals deemed necessary by the CAM or the Project Manager shall participate in this meeting. The administrative and technical aspects of the Agreement will be discussed at the meeting. Prior to the meeting, the CAM will provide an agenda to all potential meeting participants. The meeting may take place in person or by electronic conferencing (e.g., Teams, Zoom), with approval of the CAM.

The Kick-off meeting will include discussion of the following:

- The CAM’s expectations for accomplishing tasks described in the Scope of Work;
- An updated Project Schedule;
- Terms and conditions of the Agreement;
- Invoicing and auditing procedures;
- Travel;
- Equipment purchases;
- Administrative and Technical products (subtask 1.1);
- CPR meetings (subtask 1.3);
- Monthly Calls (subtask 1.5)
- Quarterly Progress reports (subtask 1.6)
- Final Report (subtask 1.7)
- Match funds (subtask 1.8);
- Permit documentation (subtask 1.9);
- Subawards(subtask 1.10);
- Technical Advisory Committee meetings (subtasks 1.11 and 1.12);
- Agreement changes;
- Performance Evaluations; and
- Any other relevant topics.

- Provide *Kick-off Meeting Presentation* to include but not limited to:
  - Project overview (i.e. project description, goals and objectives, technical tasks, expected benefits, etc.)
  - Project schedule that identifies milestones
  - List of potential risk factors and hurdles, and mitigation strategy
- Provide an *Updated Project Schedule*, *Match Funds Status Letter*, and *Permit Status Letter*, as needed to reflect any changes in the documents.

### **The CAM shall:**

- Designate the date and location of the meeting.
- Send the Recipient a *Kick-off Meeting Agenda*.

### **Recipient Products:**

- Kick-off Meeting Presentation
- Updated Project Schedule (*if applicable*)

## Exhibit A Scope of Work Current Trucking LLC

- Match Funds Status Letter (subtask 1.7) (*if applicable*)
- Permit Status Letter (subtask 1.8) (*if applicable*)

### **CAM Product:**

- Kick-off Meeting Agenda

### **Subtask 1.3 Critical Project Review (CPR) Meetings**

The goal of this subtask is to determine if the project should continue to receive CEC funding, and if so whether any modifications must be made to the tasks, products, schedule, or budget. CPR meetings provide the opportunity for frank discussions between the CEC and the Recipient. As determined by the CAM, discussions may include project status, challenges, successes, advisory group findings and recommendations, final report preparation, and progress on technical transfer and production readiness activities (if applicable). Participants will include the CAM and the Recipient and may include the CAO and any other individuals selected by the CAM to provide support to the CEC.

CPR meetings generally take place at key, predetermined points in the Agreement, as determined by the CAM and as shown in the Task List on page 1 of this Exhibit. However, the CAM may schedule additional CPR meetings as necessary. The budget may be reallocated to cover the additional costs borne by the Recipient, but the overall Agreement amount will not increase. CPR meetings generally take place at the CEC, but they may take place at another location, or may be conducted via electronic conferencing (e.g., WebEx) as determined by the CAM.

### **The Recipient shall:**

- Prepare and submit a *CPR Report* for each CPR meeting that: (1) discusses the progress of the Agreement toward achieving its goals and objectives; and (2) includes recommendations and conclusions regarding continued work on the project.
- Attend the CPR meeting.
- Present the CPR Report and any other required information at each CPR meeting.

### **The CAM shall:**

- Determine the location, date, and time of each CPR meeting with the Recipient's input.
- Send the Recipient a *CPR Agenda* with a list of expected CPR participants in advance of the CPR meeting. If applicable, the agenda may include a discussion of match funding and permits.
- Conduct and make a record of each CPR meeting. Provide the Recipient with a schedule for providing a Progress Determination on continuation of the project.
- Determine whether to continue the project, and if so whether modifications are needed to the tasks, schedule, products, or budget for the remainder of the Agreement. A determination of unsatisfactory progress This may result in project delays, including a potential Stop Work Order, while the CEC determines whether the project should continue.
- Provide the Recipient with a *Progress Determination* on continuation of the project, in accordance with the schedule. The Progress Determination may include a requirement that the Recipient revise one or more products.

### **Recipient Products:**

- CPR Report(s)

## Exhibit A Scope of Work Current Trucking LLC

### CAM Products:

- CPR Agenda(s)
- Progress Determination

### Subtask 1.4 Final Meeting

The goal of this subtask is to complete the closeout of this Agreement.

#### The Recipient shall:

- Meet with CEC staff to present project findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement. This meeting will be attended by the Recipient and CAM, at a minimum. The meeting may occur in person or by electronic conferencing (e.g., WebEx), with approval of the CAM.

The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be divided into two separate meetings at the CAM's discretion.

- The technical portion of the meeting will involve the presentation of findings, conclusions, and recommended next steps (if any) for the Agreement. The CAM will determine the appropriate meeting participants.
- The administrative portion of the meeting will involve a discussion with the CAM of the following Agreement closeout items:
  - Disposition of any procured equipment.
  - The CEC's request for specific "generated" data (not already provided in Agreement products).
  - Need to document the Recipient's disclosure of "subject inventions" developed under the Agreement.
  - "Surviving" Agreement provisions such as repayment provisions and confidential products.
  - Final invoicing and release of retention.
- Prepare a *Final Meeting Agreement Summary* that documents any agreement made between the Recipient and Commission staff during the meeting.
- Prepare a *Schedule for Completing Agreement Closeout Activities*.
- Provide copies of *All Final Products* organized by the tasks in the Agreement.

### Products:

- Final Meeting Agreement Summary (*if applicable*)
- Schedule for Completing Agreement Closeout Activities
- All Final Products

## MONTHLY CALLS, REPORTS AND INVOICES

### Subtask 1.5 Monthly Calls

The goal of this task is to have calls at least monthly between the CAM and Recipient to verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement on time and within budget.



## Exhibit A Scope of Work Current Trucking LLC

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.

**Subtask 1.6 Quarterly Progress Reports and Invoices**

The goals of this subtask are to: (1) periodically verify that satisfactory and continued progress is made towards achieving the project objectives of this Agreement; and (2) ensure that invoices contain all required information and are submitted in the appropriate format.

**The Recipient shall:**

- Submit a *Quarterly Progress Report* to the CAM. Each progress report must:
  - Summarize progress made on all Agreement activities as specified in the scope of work for the reporting period, including accomplishments, problems, milestones, products, schedule, fiscal status, and 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>
- Submit a monthly or quarterly *Invoice* on the invoice template(s) provided by the CAM.

**Recipient Products:**

- Quarterly Progress Reports
- Invoices

**CAM Product:**

- Invoice template

**Subtask 1.7 Final Report**

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, results, and conclusions of the work performed under this Agreement.

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When creating the Final Report Outline and the Final Report, the Recipient must use the CEC Style Manual provided by the CAM.

**Subtask 1.7.1 Final Report Outline**

**The Recipient shall:**

- Prepare a *Final Report Outline* in accordance with the *Energy Commission Style Manual* provided by the CAM.

**Recipient Products:**

- Final Report Outline (draft and final)

**CAM Products:**

- Energy Commission Style Manual
- Comments on Draft Final Report Outline
- Acceptance of Final Report Outline

**Subtask 1.7.2 Final Report**

**The Recipient shall:**

- Prepare a *Final Report* for this Agreement in accordance with the approved Final Report Outline, Energy Commission Style Manual, and Final Report Template provided by the CAM with the following considerations:
  - Ensure that the report includes the following items, in the following order:
    - Cover page (**required**)
    - Credits page on the reverse side of cover with legal disclaimer (**required**)
    - Acknowledgements page (optional)
    - Preface (**required**)
    - Abstract, keywords, and citation page (**required**)
    - Table of Contents (**required**, followed by List of Figures and List of Tables, if needed)
    - Executive summary (**required**)
    - Body of the report (**required**)
    - References (if applicable)
    - Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
    - Bibliography (if applicable)
    - Appendices (if applicable) (Create a separate volume if very large.)
    - Attachments (if applicable)
- Submit a draft of the Executive Summary to the TAC for review and comment.
- Develop and submit a *Summary of TAC Comments on Draft Final Report* received on the Executive Summary. For each comment received, the Recipient will identify in the summary the following:
  - Comments the Recipient proposes to incorporate.
  - Comments the Recipient does propose to incorporate and an explanation for why.
- Submit a draft of the report to the CAM for review and comment. The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt.
- Incorporate all CAM comments into the *Final Report*. If the Recipient disagrees with any

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comment, provide a *Written Responses to Comments* explaining why the comments were not incorporated into the final product.

- Submit the revised *Final Report* electronically with any Written Responses to Comments within 10 days of receipt of CAM's Written Comments on the Draft Final Report, unless the CAM specifies a longer time period or approves a request for additional time.

### Products:

- Summary of TAC Comments on Draft Final Report
- Draft Final Report
- Written Responses to Comments (*if applicable*)
- Final Report

### CAM Product:

- Written Comments on the Draft Final Report

## **MATCH FUNDS, PERMITS, AND SUBAWARDS**

### **Subtask 1.8 Match Funds**

The goal of this subtask is to ensure that the Recipient obtains any match funds planned for this Agreement and applies them to the Agreement during the Agreement term.

While the costs to obtain and document match funds are not reimbursable under this Agreement, the Recipient may spend match funds for this task. Match funds must be identified in writing, and the Recipient must obtain any associated commitments before incurring any costs for which the Recipient will request reimbursement.

### **The Recipient shall:**

- Prepare a *Match Funds Status Letter* that documents the match funds committed to this Agreement. If no match funds were part of the application that led to the CEC awarding this Agreement and none have been identified at the time this Agreement starts, then state this in the letter.

If match funds were a part of the application that led to the CEC awarding this Agreement, then provide in the letter:

- A list of the match funds that identifies:
  - The amount of cash match funds, their source(s) (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied.
  - The amount of each in-kind contribution, a description of the contribution type (e.g., property, services), the documented market or book value, the 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 must identify its owner and provide a contact name, address, telephone number, and the address where the property is located.
  - If different from the solicitation application, provide a letter of commitment from an authorized representative of each source of match funding that the funds or contributions have been secured.

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- At the Kick-off meeting, discuss match funds and the impact on the project if they are significantly reduced or not obtained as committed. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide a *Supplemental Match Funds Notification Letter* to the CAM of receipt of additional match funds.
- Provide a *Match Funds Reduction Notification Letter* to the CAM if existing match funds are reduced during the course of the Agreement. Reduction of match funds may trigger a CPR meeting.

### Products:

- Match Funds Status Letter
- Supplemental Match Funds Notification Letter (*if applicable*)
- Match Funds Reduction Notification Letter (*if applicable*)

### Subtask 1.9 Permits

The goal of this subtask 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, with the exception of costs incurred by University of California recipients. Permits must be identified and obtained before the Recipient may incur any costs related to the use of the permit(s) for which the Recipient will request reimbursement.

### The Recipient shall:

- Prepare a *Permit Status Letter* that documents the permits required to conduct this Agreement. If no permits are required at the start of this Agreement, then state this in the letter. If permits will be required during the course of the Agreement, provide in the letter:
  - A list of the permits that identifies: (1) the type of permit; and (2) the name, address, and telephone number of the permitting jurisdictions or lead agencies.
  - The schedule the Recipient will follow in applying for and obtaining the permits.

The list of permits and the schedule for obtaining them will be discussed at the Kick-off meeting (subtask 1.2), and a timetable for submitting the updated list, schedule, and copies of the permits will be developed. The impact on the project 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 progress reports and will be a topic at CPR meetings.

- If during the course of the Agreement additional permits become necessary, then provide the CAM with an *Updated List of Permits* (including the appropriate information on each permit) and an *Updated Schedule for Acquiring Permits*.
- Send the CAM a *Copy of Each Approved Permit*.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM within 5 days. Either of these events may trigger a CPR meeting.

### Products:

- Permit Status Letter
- Updated List of Permits (*if applicable*)
- Updated Schedule for Acquiring Permits (*if applicable*)
- Copy of Each Approved Permit (*if applicable*)

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### **Subtask 1.10 Obtain and Execute Subawards and Agreements with Site Hosts**

The goals of this subtask are to: (1) procure and execute subrecipients and site host agreements, as applicable, required to carry out the tasks under this Agreement; and (2) ensure that the subrecipients and site host agreements are consistent with the Agreement terms and conditions and the Recipient's own contracting policies and procedures.

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

- Execute and manage subawards and coordinate subrecipients activities in accordance with the requirements of this Agreement.
- Execute and manage site host agreements and ensure the right to use the project site throughout the term of the Agreement, as applicable. A site host agreement is not required if the Recipient is the site host.
- Notify the CEC in writing immediately, but no later than five calendar days, if there is a reasonable likelihood the project site cannot be acquired or can no longer be used for the project.
- Incorporate this Agreement by reference into each subaward.
- Include any required Energy Commission flow-down provisions in each subaward, in addition to a statement that the terms of this Agreement will prevail if they conflict with the subaward terms.
- Submit a *Subaward and Site Letter* to the CAM describing the subawards and any site host agreement needed or stating that no subawards or site host agreements are required.
- If requested by the CAM, submit a draft of each *Subaward* and any *Site Host Agreement* required to conduct the work under this Agreement.
- If requested by the CAM, submit a final copy of each executed *Subaward* and any *Site Host Agreement*.
- Notify and receive written approval from the CAM prior to adding any new subrecipient (see the terms regarding subrecipient additions in the terms and conditions).

#### **Products:**

- Subaward and Site Letter
- Draft Subawards (*if requested by the CAM*)
- Draft Site Host Agreement (*if requested by the CAM*)
- Final Subawards (*if requested by the CAM*)
- Final Site Host Agreement (*if requested by the CAM*)

### **TECHNICAL ADVISORY COMMITTEE**

#### **Subtask 1.11 Technical Advisory Committee (TAC)**

The goal of this subtask is to create an advisory committee for this Agreement. The TAC should be composed of diverse professionals. The composition will vary depending on interest, availability, and need. TAC members will serve at the CAM's discretion. The purpose of the TAC is to:

- Provide guidance in project direction. The guidance may include scope and methodologies, timing, and coordination with other projects. The guidance may be based on:
  - Technical area expertise;
  - Knowledge of market applications; or

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- Linkages between the Agreement work and other past, present, or future projects (both public and private sectors) that TAC members are aware of in a particular area.
- Review products and provide recommendations for needed product adjustments, refinements, or enhancements.
- Evaluate the tangible benefits of the project to the state of California, and provide recommendations as needed to enhance the benefits.
- Provide recommendations regarding information dissemination, market pathways, or commercialization strategies relevant to the project products.
- Help set the project team's goals and contribute to the development and evaluation of its statement of proposed objectives as the project evolves.
- Provide a credible and objective sounding board on the wide range of technical and financial barriers and opportunities.
- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate, to the extent the TAC members feel is appropriate, on behalf of the project in its effort to build partnerships, governmental support, and relationships with a national spectrum of influential leaders.
- Ask probing questions that insure a long-term perspective on decision-making and progress toward the project's strategic goals.

The TAC may be composed of qualified professionals spanning the following types of disciplines:

- Researchers knowledgeable about the project subject matter;
- Members of trades that will apply the results of the project (e.g., designers, engineers, architects, contractors, and trade representatives);
- Public interest market transformation implementers;
- Product developers relevant to the project;
- U.S. Department of Energy research managers, or experts from other federal or state agencies relevant to the project;
- Public interest environmental groups;
- Utility representatives;
- Air district staff; and
- Members of relevant technical society committees.

### **The Recipient shall:**

- Prepare a *List of Potential TAC Members* that includes the names, companies, physical and electronic addresses, and phone numbers of potential members. The list will be discussed at the Kick-off meeting, and a schedule for recruiting members and holding the first TAC meeting will be developed.
- Recruit TAC members. Ensure that each individual understands member obligations and the TAC meeting schedule developed in subtask 1.12.
- Prepare a *List of TAC Members* once all TAC members have committed to serving on the TAC.
- Submit *Documentation of TAC Member Commitment* (such as Letters of Acceptance) from each TAC member.

### **Products:**

- List of Potential TAC Members

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- List of TAC Members
- Documentation of TAC Member Commitment

### **Subtask 1.12 TAC Meetings**

The goal of this subtask is for the TAC to provide strategic guidance for the project by participating in regular meetings, which may be held via teleconference.

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

- Discuss the TAC meeting schedule with the CAM at the Kick-off meeting. Determine the number and location of meetings (in-person and via teleconference) in consultation with the CAM.
- Prepare a *TAC Meeting Schedule* that will be presented to the TAC members during recruiting. Revise the schedule after the first TAC meeting to incorporate meeting comments.
- Prepare a *TAC Meeting Agenda* and *TAC Meeting Back-up Materials* for each TAC meeting.
- Organize and lead TAC meetings in accordance with the TAC Meeting Schedule. Changes to the schedule must be pre-approved in writing by the CAM.
- Prepare *TAC Meeting Summaries* that include any recommended resolutions of major TAC issues.

#### **The TAC shall:**

- Help set the project team's goals and contribute to the development and evaluation of its statement of proposed objectives as the project evolves.
- Provide a credible and objective sounding board on the wide range of technical and financial barriers and opportunities.
- Help identify key areas where the project has a competitive advantage, value proposition, or strength upon which to build.
- Advocate on behalf of the project in its effort to build partnerships, governmental support and relationships with a national spectrum of influential leaders.
- Ask probing questions that insure a long-term perspective on decision-making and progress toward the project's strategic goals.
- Review and provide comments to proposed project performance metrics.
- Review and provide comments to proposed project Draft Technology Transfer Plan.

#### **Products:**

- TAC Meeting Schedule (draft and final)
- TAC Meeting Agendas (draft and final)
- TAC Meeting Back-up Materials
- TAC Meeting Summaries

### **Subtask 1.13 Project Performance Metrics**

The goal of this subtask is to finalize key performance targets for the project based on feedback from the TAC and report on final results in achieving those targets. The performance targets should be a combination of scientific, engineering, techno-economic, and/or programmatic metrics that provide the most significant indicator of the research or technology's potential success.

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### The Recipient shall:

- Complete and submit the project performance metrics section of the *Initial Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task, to the CAM.
- Present the draft project performance metrics at the first TAC meeting to solicit input and comments from the TAC members.
- Develop and submit a *TAC Performance Metrics Summary* that summarizes comments received from the TAC members on the proposed project performance metrics. The *TAC Performance Metrics Summary* will identify:
  - TAC comments the Recipient proposes to incorporate into the *Initial Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task.
  - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Develop and submit a *Project Performance Metrics Results* document describing the extent to which the Recipient met each of the performance metrics in the *Final Project Benefits Questionnaire*, developed in the Evaluation of Project Benefits task.
- Discuss the *Project Performance Metrics Results* at the Final Meeting.

### Products:

- TAC Performance Metrics Summary
- Project Performance Metrics Results

## IV. TECHNICAL TASKS

### TASK 2 SITE DESIGN

The goal of this task is to select the demonstration site and complete the design of the EV charging facility, which will target an initial peak charging demand of 1.8 MW with the flexibility to expand to 12.22 MW under utility's LCMS Pilot Program.

### The Recipient shall:

- Select demonstration site from the two proposed sites in coordination with the utility after considering which site would maximize project benefits.
- Secure access to the demonstration project site through executed site lease or purchase and provide *Evidence of Site Lease or Purchase*.
- Secure utility interconnection capacity and provide *Utility Interconnection Agreement* to include terms surrounding the use of LCMS.
- Develop a *Civil Infrastructure Design Report* that includes, but is not limited to, detailed requirements for terrain preparation and grading, drainage systems design, subgrade and base construction specifications, concrete work for foundations and slabs, curb and gutter installation, painting and striping for traffic and pedestrian areas, and the installation of bumper and wheel stops, along with associated material specifications, construction methods, and compliance with local codes and regulations.
- Design a power distribution system for the site, including the interconnection to the utility grid using customer-owned switchgear, a medium-voltage bus, a 4-way underground distribution switchgear to create a medium-voltage loop around the site, a medium-voltage transformer, and an AC bus to efficiently deliver power to the DC fast chargers.



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- Develop *Power Distribution System Design Report* that includes, but is not limited to, system requirements, system layout and design, efficiency calculations, compliance with standards and regulations, construction and commissioning plans, and maintenance guidelines.
- Determine LCMS parameters, specifications, normal type operations, and abnormal type operations for both local and communication-based modes and develop *LCMS Parameters, Specifications, and Operations Report*. Perform validation and verification testing with utility to confirm requirements are met, and to finalize said LCMS report.
- Prepare a *CPR Report #1* in accordance with subtask 1.3.
- Participate in a CPR meeting.

### Products:

- Evidence of Site Lease or Purchase
- Utility Interconnection Agreement
- Civil Infrastructure Design Report
- Power Distribution System Design Report
- LCMS Parameters, Specifications, and Operations Report
- CPR Report #1

### TASK 3 CONTRACTOR AND VENDOR SELECTION

The goal of this task is to issue a request for proposals (RFP) with site design specifications to relevant material suppliers, general contractors, and vendors to conduct a competitive bid process to drive down project costs.

#### The Recipient shall:

- Administer a competitive RFP for relevant general contractors and material vendors.
- Issue *Site Design* specifications to general contractors, electrical contractors, civil contractors, fencing contractors, security contractors, electrical equipment vendors, and other relevant contractors and vendors.
- Finalize contractor and vendor selection and provide a *Summary of Contractor and Vendor Bids* that includes, but is not limited to, an overview of the bids, evaluation of the bids, recommendations, and next steps.

### Products:

- Site Design
- Summary of Contractor and Vendor Bids

### TASK 4 PERMITS AND APPROVALS

The goal of this task is to acquire all necessary non-discretionary/non-conditional permits and approvals from the relevant Authorities Having Jurisdiction (AHJ) and the utility as outlined in Task 1.9.

#### The Recipient shall:

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- Submit project plans to San Bernardino County's Department of Land Use Services and provide *Entitlement Conclusion by the San Bernardino County Department of Land Use Services*.
- Submit project plans for *Building Permit*.
- Submit project plans for *Grading Permit*.
- Submit project plans to Southern California Edison for final approval. Develop the following:
  - *Utility Interconnection Design Map* including but not limited to a layout of existing and proposed infrastructure, the service size and capacity, access points for utility maintenance and electrical system inspection, and compliance with relevant safety and technical standards.
  - *Utility Easement Package* granting utility right to access property installation, maintenance, and operation of utility services.

**Products:**

- Entitlement Conclusion by the San Bernardino County Department of Land Use Service
- Building Permit
- Grading Permit
- Utility Interconnection Design
- Utility Easement Package

**TASK 5 CONSTRUCTION ADMINISTRATION**

The goal of this task is to work with contractors, subcontractors, and material suppliers to prepare for construction activities.

**The Recipient shall:**

- Negotiate and execute *Subcontract Agreements*.
- Collect necessary business agreement documents, including W9's, Certificates of Insurance, and Lien Waivers.
- Coordinate *Performance and Payment Bonds*.
- Issue *Purchase Orders* for project materials.
- Detail *Project Construction Schedule* and *Cost Accounting Schedule*.
- Document construction and commissioning safety programs and establish compliance protocols into a high-level *Safety Program and Compliance Report*.

**Products:**

- Subcontract Agreements
- Performance and Payment Bonds
- Purchase Orders
- Project Construction Schedule
- Cost Accounting Schedule
- Safety Program and Compliance Report

## Exhibit A Scope of Work Current Trucking LLC

### **TASK 6 CONSTRUCTION – CIVIL**

The goal of this task is to work with the civil contractor to permit and build the project civil infrastructure.

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

- Obtain all necessary permits and approvals for civil construction; ensure compliance with local, state, and federal regulations; and coordinate with relevant authorities throughout the permitting process.
- Execute terrain preparation and grading.
- Execute drainage work.
- Execute subgrade work.
- Execute base construction work.
- Execute concrete work.
- Execute curb and gutter work.
- Execute painting and striping work.
- Execute bumper and wheel stop work.
- Provide *High-Quality Digital Photographs of Completed Civil Infrastructure*.

#### **Products:**

- High-Quality Digital Photographs of Completed Civil Infrastructure

### **TASK 7 CONSTRUCTION – ELECTRICAL**

The goal of this task is to work with the electrical contractor to permit and build the project electrical infrastructure.

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

- Obtain all necessary permits and approvals for electrical work activities; ensure compliance with local, state, and federal regulations; and coordinate with relevant authorities throughout the permitting process.
- Procure main switchgear, underground distribution switchgear, transformer, switchboard, chargers, LCMS, security system, and site lighting.
- Build primary medium-voltage electrical bus.
- Build secondary low-voltage electrical bus.
- Build lighting.
- Deploy security system.
- Deploy key card/RFID access terminals.
- Deploy LCMS hardware.
- Provide *High-Quality Digital Photographs of Completed Electrical Infrastructure*.

#### **Products:**

- High-Quality Digital Photographs of Completed Electrical Infrastructure

### **TASK 8 CONSTRUCTION – FENCING AND SECURITY**

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The goals of this task are (1) to work with fencing contractor to permit and build the project fencing and (2) to work with the security system contractor to install the security system.

### **The Recipient shall:**

- Obtain all necessary permits and approvals for fencing activities; ensure compliance with local, state, and federal regulations; and coordinate with relevant authorities throughout the permitting process.
- Procure fencing materials.
- Install fencing and pedestrian access gates.
- Integrate key card/RFID access with fencing and pedestrian access gates.
- Provide *High-Quality Digital Photographs of Completed Fencing*.
- Procure security system materials.
- Install security system.
- Integrate security system protocol with key card/RFID access.
- Integrate security system protocol with fencing and pedestrian access gates.

### **Products:**

- High-Quality Digital Photographs of Completed Fencing

## **TASK 9 COMMISSIONING**

The goal of this task is to successfully commission each system to validate operation and secure certifications of commissioning.

### **The Recipient shall:**

- Commission main switchgear.
- Commission underground distribution switchgear.
- Commission transformer.
- Commission switchboard.
- Commission EV power cabinets and DC dispensers.
- Commission LCMS.
- Commission lighting.
- Commission security system.
- Commission key card/RFID access.
- Compile and provide *Certifications of Commissioning* for all systems except those related to security system and key card/RFID access.
- Develop an *Energization Timeline Report* to document energization time savings benefits of flexible interconnection.
- Prepare a *CPR Report #2* in accordance with subtask 1.3.
- Participate in a CPR meeting.

### **Products:**

- Certifications of Commissioning
- Energization Timeline Report
- CPR Report #2

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**TASK 10: OPERATIONS AND DATA COLLECTION**

The goal of this task is to operate the charging facility with the load control management system (LCMS) and collect at least 6 months of project data.

**The Recipient Shall:**

- Collect and report on project data including but not limited to:
  - Capacity of electric service and flexible load capacity
  - Number, type/class, and make of vehicles used
  - Actions taken by the LCMS to manage load including reducing charging levels or disconnecting devices
  - Charging load profiles
  - Customer feedback including impacts of LCMS on vehicle operational needs
  - Load shift metrics resulting from LCMS
  - Utility signals and power limits received through communication-based LCMS
  - Grid stability parameters to ensure flexible charging is not disrupting grid reliability
  - Reduced or deferred grid infrastructure upgrade costs
  - Operational costs including charging and use of the LCMS system
  - Efficiency of power distribution from medium-voltage utility connection to DC fast chargers
  - Local emission and greenhouse gas reductions
  - Utilization of chargers
  - Queuing
  - Reliability metrics including failures and remediation processes used (e.g., loss of communications)
- Develop a *Project Data Report* that compiles and organizes collected data and provides analysis on that data with the goal of effectively demonstrating (1) the LCMS capabilities and performance and (2) the anticipated benefits of flexible capacity agreements enabled by LCMS for MDHD battery electric truck charging applications.
- Prepare a *CPR Report #3* in accordance with subtask 1.3.
- Participate in a CPR meeting.

**Products:**

- Project Data Report
- CPR Report #3

**TASK 11: COMMUNITY OUTREACH AND ENGAGEMENT**

The goal of this task is to engage with the local community on their energy and economic needs, solicit feedback on project implementation, and educate stakeholders on the project impacts and benefits.

**The Recipient Shall:**

- Develop *Educational Materials* on project information and benefits. Community stakeholder groups include, but are not limited to:

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- Local Government Officials & City Planners: Emphasize urban development, reduced emissions, and aligning with sustainability goals and climate action plans.
- Neighborhood Associations & Community Groups: Highlight improved air quality, modern infrastructure, and increased community appeal.
- Public Transportation Authorities: Discuss integrating the project technology with that of public transit to support multimodal, eco-friendly transportation options.
- Local Businesses & Chambers of Commerce: Show how EV charging can attract customers, increase foot traffic, and boost the local economy.
- Educational Institutions (Schools, Colleges): Focus on educating future generations, providing access to sustainable transport, and serving as sustainability role models.
- Environmental & Advocacy Groups: Highlight opportunities to support clean energy initiatives and promote healthier, more sustainable communities.
- Public Health Organizations: Connect EV charging hubs to improved air quality and reduced health risks from vehicle emissions.
- Utility Companies & Energy Cooperatives: Stress collaboration on sustainable energy solutions and grid modernization for the community.
- Residents & Homeowners: Show how local charging infrastructure increases property values and offers convenient, eco-friendly transportation options.
- Non-Profit Organizations & Foundations: Emphasize partnerships for equitable access to EV infrastructure and grid load management, especially in underserved communities.
- Emergency Services & Public Safety Officials: Discuss the role of EV infrastructure in resilience planning and ensuring reliable transportation during emergencies.
- Distribute educational materials through various media including but not limited to social media, press releases, and digital and hard copy brochures.
- Host a series of community events and meetings to promote awareness, educate the community and gather input/feedback on energy needs, economic needs, and project implementation.
- Develop *Community Engagement Summary Report* with high-level overview of events, community input on energy and economic needs, community feedback on project implementation, and responses or actions taken to address community input and feedback.

#### Products:

- Educational Materials
- Community Engagement Summary Report

#### TASK 12: EVALUATION OF PROJECT BENEFITS

The goal of this task is to report the benefits resulting from this project.

#### The Recipient shall:

- Complete the *Initial Project Benefits Questionnaire*. The Initial Project Benefits Questionnaire shall be initially completed by the Recipient with 'Kick-off' selected for the 'Relevant data collection period' and submitted to the CAM for review and approval.

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- Complete the *Annual Survey* by January 31st of each year. The Annual Survey includes but is not limited to the following information:
  - Technology commercialization progress
  - New media and publications
  - Company growth
  - Follow-on funding and awards received
- Complete the *Final Project Benefits Questionnaire*. The Final Project Benefits Questionnaire shall be completed by the Recipient with 'Final' selected for the 'Relevant data collection period' and submitted to the CAM for review and approval.
- Respond to CAM questions regarding the questionnaire drafts.
- Complete and update the project profile on the CEC's public online project and recipient directory on the Energize Innovation website ([www.energizeinnovation.fund](http://www.energizeinnovation.fund)) and provide *Documentation of Project Profile on EnergizeInnovation.fund*, including the profile link.
- If the Prime Recipient is an Innovation Partner on the project, complete and update the organizational profile on the CEC's public online project and recipient directory on the Energize Innovation website ([www.energizeinnovation.fund](http://www.energizeinnovation.fund)) and provide *Documentation of Organization Profile on EnergizeInnovation.fund*, including the profile link.

### Products:

- Initial Project Benefits Questionnaire
- Annual Survey(s)
- Final Project Benefits Questionnaire
- Documentation of Project Profile on [EnergizeInnovation.fund](http://EnergizeInnovation.fund)
- Documentation of Organization Profile on [EnergizeInnovation.fund](http://EnergizeInnovation.fund)

### TASK 13 TECHNOLOGY/KNOWLEDGE TRANSFER ACTIVITIES

The goal of this task is to ensure the technological learning that resulted from the demonstration(s) is captured and disseminated to the range of professions that will be responsible for future deployments of this technology or similar technologies.

### The Recipient Shall:

- With project partner EPRI, develop and submit a *Project Case Study Plan* that outlines how the Recipient will document the planning, construction, commissioning, and operation of the technology or system being demonstrated. The Project Case Study Plan should include:
  - An outline of the objectives, goals, and activities of the case study.
  - The organization that will be conducting the case study and the plan for conducting it.
  - A list of professions and practitioners involved in the technology's deployment.
  - Specific activities the recipient will take to ensure the learning that results from the project is disseminated to those professions and practitioners.
  - Presentations/webinars/training events to disseminate the results of the case study.
- Present the draft *Project Case Study Plan* to the TAC for review and comment.

## Exhibit A Scope of Work Current Trucking LLC

- Develop and submit a *Summary of TAC Comments* that summarizes comments received from the TAC members on the draft *Project Case Study Plan*. This document will identify:
  - TAC comments the Recipient proposes to incorporate into the final *Technology Transfer Plan*.
  - TAC comments the Recipient does not propose to incorporate with and explanation why.
- Submit the final *Project Case Study Plan* to the CAM for approval.
- Execute the final Project Case Study Plan and develop and submit a Project Case Study.
- When directed by the CAM, develop presentation materials for a CEC sponsored conference/workshop(s) on the project.
- When directed by the CAM, participate in annual EPIC symposium(s) sponsored by the California CEC.
- 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:**

- Project Case Study Plan (draft and final)
- Summary of TAC Comments
- Project Case Study (draft and final)
- High Quality Digital Photographs

### **V. PROJECT SCHEDULE**

Please see the attached Excel spreadsheet.