



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
November 12, 2025 Business Meeting
Backup Materials for Pilot Travel Centers 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: 25-1112-XX

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: Pilot Travel Centers 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 RNEV-25-004 with Pilot Travel Centers LLC for a \$640,000 grant. This project will install, operate, and maintain four public EV DC fast charging ports compliant with NEVI Formula Program requirements at one site in San Diego; 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 November 12, 2025.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Kim Todd
Secretariat



GRANT REQUEST FORM (GRF)

A. New Agreement Number

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

New Agreement Number: RNEV-25-004

B. Division Information

1. Division Name: Fuels and Transportation Division
2. Agreement Manager: Brittani Gallagher
3. MS-6
4. Phone Number: 916-232-8864

C. Recipient's Information

1. Recipient's Legal Name: Pilot Travel Centers LLC
2. Federal ID Number:

D. Title of Project

Title of project: California Round 2 NEVI Project - Corridor Group 15C – Pilot Travel Centers LLC

E. Term and Amount

1. Start Date: 11/12/2025
2. End Date: 04/30/2032
3. Amount: \$640,000

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? N/A
2. The Proposed Business Meeting Date: 11/12/2025
3. Consent or Discussion? Consent
4. Business Meeting Presenter Name: N/A
5. Time Needed for Business Meeting: N/A
6. The email subscription topic is: National Electric Vehicle Infrastructure Formula Program

Agenda Item Subject and Description:

Pilot Travel Centers LLC. Proposed resolution approving agreement RNEV-25-004 with Pilot Travel Centers LLC for a \$640,000 grant, and adopting staff's recommendation that this action is exempt from CEQA. This project will install, operate, and maintain four public EV DC fast charging ports compliant with NEVI Formula Program requirements at one site in San Diego. (NEVI Formula Program Funding) Contact: Brittani Gallagher

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: 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: Cal. Code Regs., tit. 14, §§ 15301, 15303

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

None

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

Cal. Code Regs., tit 14, sec. 15301 provides that projects that consist 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 the provisions of CEQA. This project involves the installation of four EV charging ports at one site located in San Diego. The site is located less than one mile from State Route 905, and is located within an existing, paved parking lot on commercial property. No historic buildings or resources will be impacted by the project. Minor modifications to the site may be needed such as installing electrical equipment including a transformer and switchgear, trenching to install electrical conduit to connect the transformer and switchgear to the utility connection. Because the existing sites of the project have been previously developed with minor alterations included, this project involves negligible or no expansion of existing or former use and will not have a significant effect on the environment. Therefore, this project is exempt under section 15301.

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. The project will be confined to the existing lot within an area of approximately 40 feet by 60 feet. Because this



project consists of the construction and location of limited numbers of new, small structures and/or the installation of small new equipment in small structures with only minor modifications to the structures, this project is exempt under section 15303.

Additionally, the project does not involve any unusual circumstances, will not result in damage to any scenic resources within a highway officially designated as a state scenic highway, none of the sites are included on any list compiled pursuant to Government Code section 65962.5, and the project will not cause a substantial adverse change in the significance of a historical resource. The project, when considered as a whole, will not result in a cumulative impact that is significant on the environment. Therefore, none of the exceptions to exemptions listed in CEQA Guidelines section 15300.2 apply to this project and this project will not have a significant effect on the environment.

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

Not applicable

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

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
No subcontractors to report	\$0	\$0

J. Vendors and Sellers for Equipment and Materials/Miscellaneous



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 01/2024)

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
EVgo Services LLC (Equipment)	\$640,000	\$160,000

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
ARFVTF	2023-24	901.004	\$640,000

TOTAL Amount: \$640,000

R&D Program Area: N/A

Explanation for "Other" selection N/A

Reimbursement Contract #: RMB600-23-001

Federal Agreement #: N/A

M. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Brandon Trama

Address: 5508 Lonas Drive

City, State, Zip: Knoxville, TN 37909

Phone: (865) 474-2684

E-Mail: brandon.trama@pilottravelcenters.com

2. Recipient's Project Manager

Name: Allie LaCroix

Address: 5508 Lonas Drive



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 01/2024)

City, State, Zip: Knoxville, TN 37909

Phone: (865) 206-6014

E-Mail: allie.lacroix@pilotcompany.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-24-606
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: Brittani Gallagher

Approval Date: 8/18/2025

Office Manager: Charles Smith

Approval Date: 9/24/2025

Deputy Director: Melanie Vail

Approval Date: 9/29/2025

Exhibit A SCOPE OF WORK

TECHNICAL TASK LIST

Task #	CPR	Task Name
1		Administration
2		Environmental Review and Engineering
3		Right-of-Way
4	X	Site Preparation and Equipment Procurement
5	X	Charging Station Construction and Commissioning
6	X	Operations and Reliability
7		Semi-Annual Electric Vehicle Charger Inventory Reports
8		Other Data Collection and Analysis
9		Federal Data Reporting
10		Project Fact Sheet

KEY NAME LIST

Task #	Key Personnel	Key Subrecipient(s)	Key Partner(s)
1	Allie LaCroix, Brandon Trama		
2	Joshua Copeland		
3	Joshua Copeland		
4	Joshua Copeland	EVgo Services LLC	
5	Joshua Copeland	EVgo Services LLC	
6	Scott Hundley, Tim Morse	EVgo Services LLC	
7	Allie LaCroix		
8	Allie LaCroix, Tim Morse		
9	Allie LaCroix		
10	Allie LaCroix		

GLOSSARY

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

Term/ Acronym	Definition
AB	Assembly Bill
AC Level 2	Alternating current. A charger that operates on a circuit from 208 volts to 240 volts and transfers AC electricity to a device in an electric vehicle (EV) that converts AC to direct current to charge an EV battery.
ADA	Americans with Disabilities Act
API	Application programming interface. A type of software interface that offers service to other pieces of software. An API allows two or more computer programs to communicate with each other.
Battery Energy Storage	Technology that stores electrical energy in batteries for later use, helping to stabilize the electric grid by balancing supply and demand, integrating renewable energy sources, and providing backup power during outages or peak demand periods.
Caltrans	California Department of Transportation
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CCS	Combined Charging System. A charging port standard for fast charging of EVs that can provide up to 350 kilowatts of power.
CEC	California Energy Commission
CEQA	California Environmental Quality Act
CFR	Code of Federal Regulations
Charge attempt	Any instance of an EV driver taking action to initiate a charging session by taking one or all of the following steps in any order: 1) attaching the connector to the EV appropriately or 2) attempting to authorize a charging session by use of radio frequency identification (RFID) technology, credit card, charging network provider smartphone application (app), screen input, or calling the charging network provider's customer service number.

Term/ Acronym	Definition
Charger	A device with one or more charging ports and connectors for charging EVs. Also referred to as electric vehicle supply equipment (EVSE). This definition excludes any charger used solely for private use at a single-family residence or a multifamily dwelling with four or fewer dwelling units.
Charging network	A collection of chargers located on one or more property(ies) that are connected via digital communications to manage the facilitation of payment, the facilitation of electrical charging, and any related data requests.
Charging network provider	The entity that provides the digital communication network that remotely manages the chargers. Charging network providers may also serve as charging station operators and/or manufacture chargers.
Charging port	The system within a charger that charges one EV. A charging port may have multiple connectors, but it can provide power to charge only one EV through one connector at a time. May also be referred to as “port.”
Charging session	The period after a charge attempt during which the electric vehicle is allowed to request energy. Charging sessions can be terminated by the customer, the EV, the charger, the charging station operator, or the charging network provider.
Charging station	The area in the immediate vicinity of one or more chargers and includes the chargers, supporting equipment, parking areas adjacent to the chargers, and lanes for vehicle ingress and egress. A charging station could comprise only part of the property on which it is located.
Charging station management system	A system that may be used to operate a charger, to authorize use of the charger, or to record or report charger data, such as by using OCPP.
Charging station operator	The entity that owns the chargers and supporting equipment and facilities at one or more charging stations. Although this entity may delegate responsibility for certain aspects of charging station operation and maintenance to subrecipients or vendors, this entity retains responsibility for operation and maintenance of chargers and supporting equipment and facilities. In some cases, the charging station operator and the charging network provider are the same entity.
Connector	The device that attaches an EV to a charging port to transfer electricity.

Term/ Acronym	Definition
Corrective maintenance	Maintenance that is carried out after failure detection and is aimed at restoring an asset to a condition in which it can perform its intended function.
CPR	Critical Project Review
DBA	Davis-Bacon Act
DCFC	Direct current fast charger. A charger that enables rapid charging by delivering direct-current (DC) electricity directly to an EV's battery.
Depot	Type of “home base” behind-the-fence location where a vehicle is typically kept when not in use (usually parked on a nightly basis).
Downtime	A period of time that a charger is not capable of successfully dispensing electricity or otherwise not functioning as designed. Downtime is calculated pursuant to Task 6.3.
DSA	Data Sharing Agreement
E-76	E-76 is the federal-aid authorization to proceed process. A Project Authorization/Adjustment Request Form (DOT LAPM 3-A , found at https://forms.dot.ca.gov/v2Forms/servlet/FormRenderer?frmid=DOTLAPM3A) is used to request FHWA authorization to begin reimbursable work for a specific project phase, such as construction. FHWA authorization or “E-76 approval” means the request to begin work is approved and establishes the date from which reimbursable work may begin.
EV	Electric Vehicle. A motor vehicle that is either partially or fully powered on electric power received from an external power source. In the NEVI regulation, EVs do not include golf carts, electric bicycles, or other micromobility devices.
EVITP	Electric Vehicle Infrastructure Training Program. It provides training and certification for electricians installing electric vehicle supply equipment.
EVSE	Electric vehicle supply equipment. A charger as defined.
EV-ChART	Electric Vehicle Charger Analytics and Reporting Tool
Excluded downtime	Downtime that is caused by events pursuant to Task 6.3.
Failed charging session	Following a charge attempt, the criteria for a successful charging session were not met.
FHWA	Federal Highway Administration

Term/ Acronym	Definition
FTD	Fuels and Transportation Division
GFO	Grant Funding Opportunity
Hardware	The machines, wiring, and other physical components of an electronic system including onboard computers and controllers.
Inoperative State	The charger or charging port is not operational.
Installed	Attached or placed at a location and available for use for a charging session. The date a charger is installed is the date it is first available for use for a charging session.
Interoperability	Successful communication between the software, such as the software controlling charging on the EV and the software controlling the charger. Interoperability failures are communication failures between the EV and charger that occur while the software of each device is operating as designed. Interoperability failure leads to failed charging sessions.
kW	Kilowatt
kWh	Kilowatt-hour
Maintenance	Any instance in which preventive or corrective maintenance is carried out on equipment.
NEPA	National Environmental Policy Act
Networked	A charger that can receive or send commands or messages remotely from or to a charging network provider or is otherwise connected to a central management system, such as by using OCPP 2.0.1, for the purposes of charger management and data reporting.
NEVI	National Electric Vehicle Infrastructure
Nonnetworked charger	A charger that is not networked.
OCPI	Open Charge Point Interface. An open-source communication protocol that governs the communication among multiple charging networks, other communication networks, and software applications to provide information and services for EV drivers.
OCPP	Open Charge Point Protocol. An open-source communication protocol that specifies communication between chargers and the charging networks that remotely manage the chargers.

Term/ Acronym	Definition
Operational	Or “up.” A charging port’s hardware and software are both online and available to use, or in use, and the charging port is capable of successfully dispensing electricity.
Operative State	The charger is operational.
Preventative maintenance	Maintenance that is performed on physical assets to reduce the chances of equipment failure and unplanned machine downtime.
Primary Vehicle Type	A vehicle type depending on the GVWR such as "light duty" or "LD" (GVWR <= 10,000), "medium duty" or "MD" (10,000 < GVWR <= 26,000), "heavy duty" or "HD" (GVWR > 26,000).
Private	Charging ports located at parking space(s) that are privately owned and operated, often dedicated to a specific driver or vehicle (for example, a charging port installed in a garage of a single-family home).
Public	Charging ports located at parking space(s) designated by the property owner or lessee to be available to and accessible by the public.
Real property interest	Any interest in land and any improvements thereto, with option to purchase or similar action to acquire and/or preserve the right of way (Caltrans Right of Way Manual, Section 5.01.02.00)
Recipient	Pilot Travel Centers LLC
RSA	Registered Service Agency. An entity that repairs a commercial device that is registered with the California Department of Food and Agriculture Division of Measurement Standards.
SB	Senate Bill
SAE J3400	A charging port standard for charging of EVs based on the North American Charging Standard (NACS) connector.
SCAR	Successful Charge Attempt Rate
Shared Private	Charging ports located at parking space(s) designated by a property owner or lessee to be available to, and accessible by, employees, tenants, visitors, and residents. Examples include workplaces and shared parking at multifamily residences.

Term/ Acronym	Definition
Small Business	Please refer to California Government Code §14837 (d)(1)(A)-(B). “Small business” means an independently owned and operated business that is not dominant in its field of operation, the principal office of which is located in California, the officers of which are domiciled in California, and which, together with affiliates, has 100 or fewer employees, and average annual gross receipts of \$15 million dollars or less over the previous three years, or is a manufacturer, as defined in subdivision (c), with 100 or fewer employees. For the purposes of public works contracts, as defined in Section 1101 of the Public Contract Code, and engineering contracts, as described in Section 4525, for public works projects, awarded through competitive bids or otherwise, “small business” means an independently owned and operated business that is not dominant in its field of operation, the principal office of which is located in California, the officers of which are domiciled in California, and which, together with affiliates, has 200 or fewer employees, and average annual gross receipts of \$36 million dollars or less over the previous three years.
Software	A set of instructions, data, or programs used to operate computers and execute specific tasks.
Solicitation	GFO-24-606 California’s National Electric Vehicle Infrastructure Formula Program – Solicitation 2
Subaward	For the Recipient, a subaward means all agreements it has with subrecipients and vendors. For a subrecipient, a subaward means all agreements it has with sub-subrecipients and vendors. For any lower-tiered level of sub-subrecipient, a subaward means all agreements it has with its own sub-subrecipients and vendors.
Subrecipient	A person or entity that receives grant funds directly from the Recipient and is entrusted by the Recipient to make decisions about how to conduct some of the grant’s activities. A subrecipient’s role involves discretion over grant activities and is not merely just selling goods or services.
Sub-Subrecipient	Has the same meaning as a subrecipient except that it receives grant funds from a subrecipient or any lower tier level of a sub-subrecipient.

Term/ Acronym	Definition
Successful charging session	Following a charging attempt, a customer's EV battery is charged to the state of charge the customer desires and is disconnected manually by the customer or by the EV's onboard software system terminating the charging session, without an additional charge attempt.
Uptime	The charging port uptime percentage for the reporting period, excluding downtime pursuant to Task 6.3
Vendor	A person or entity that sells goods or services to the Recipient, subrecipient, or any lower-tiered level of sub-subrecipient, in exchange for some of the grant funds, and does not make decisions about how to perform the grant's activities. The vendor's role is ministerial and does not involve discretion over grant activities.

BACKGROUND

The Infrastructure Investment and Jobs Act, signed into law in November 2021 (Public Law 117-58), authorizes hundreds of billions of dollars in new investments in a wide array of infrastructure categories, including roads and bridges, water infrastructure, passenger rail, energy, and broadband internet. Electric vehicle (EV) charging infrastructure will see significant new funding, with \$5 billion to accelerate EV infrastructure deployment nationally under the National Electric Vehicle Infrastructure (NEVI) formula program. California's share is expected to be \$384 million, allocated over 5 years.

NEVI is an initiative to create a coast-to-coast network of EV chargers focused on major highways that support the majority of long-distance trips. This national network will give drivers confidence they can always find a place to charge, and jump start private investment in charging infrastructure and EVs.

The California Energy Commission (CEC) is collaborating with the California Department of Transportation (Caltrans) on charging infrastructure deployment and has entered into an agreement with Caltrans to implement and administer California's NEVI formula program.

On December 19, 2024, the CEC released a Grant Funding Opportunity (GFO) entitled "California's National Electric Vehicle Infrastructure Formula Program – Solicitation 2." This competitive grant solicitation was to install high-powered direct current (DC) fast charging stations along California's alternative fuel corridors which will help establish a coast-to-coast network of EV charging stations to support long-distance travel. In response to GFO-24-606, the Recipient submitted application #22, which was proposed for funding in the CEC's Notice of Proposed Awards on July 23, 2025. GFO-24-606 and Recipient's application are hereby incorporated by reference into this Agreement in their entirety. This project is listed as Federal Project #NEVIL-7516(024) in Caltrans records.

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 this Agreement, this Agreement shall control. Similarly, in the event of any conflict or inconsistency between the terms of this Agreement and the Solicitation, the terms of this Agreement shall control.

Problem Statement:

Californians face adverse health, quality of life, and climate impacts from the harmful emissions associated with burning fossil fuels for mobility. Transportation electrification is one solution for reducing these emissions, and state and federal programs are providing investment for the transition to EVs. The State of California is responsible for building out a statewide network of publicly available direct current fast chargers (DCFCs) at charging stations along federally-designated Alternative Fuel Corridors under the NEVI formula program. This network of charging stations being built under the NEVI formula program will support the fueling needs of the growing number of EVs driving throughout the state and across the nation. The NEVI formula program is designed to support long-distance, interstate travel and to ensure that this travel of both passengers and freight via EV is not constrained.

Goals of the Agreement:

The goals of this Agreement are to deploy an interconnected network of DCFCs at a public charging station along the Corridor Segment 15C, defined below; operate that charging station; and collect data about station operations as required under the NEVI program.

Objectives of the Agreement:

The objectives of this Agreement are to:

- Complete, in conjunction with other existing and planned NEVI-compliant charging stations, the buildout of Corridor Segment 15C to meet all NEVI Formula Program requirements. Together, all existing and planned NEVI-compliant charging stations must be spaced at a maximum distance of 50 miles apart and within 1 mile of the designated roadway. Each EV charging station must be publicly accessible, include at least four 150+ kilowatt (kW) DCFCs with CCS ports, be capable of simultaneously charging four EVs at 150 kW or above at each port with a minimum station power capability at or above 600 kW, and meet the minimum standards and requirements of 23 CFR 680.

The Corridor Segment included in this Agreement is described in Table 1.

Table 1

Corridor Segment	Description
15C	Stand-alone Project: SR 905: Mexico Border to San Diego (I-5)

- Deploy a total of one (1) NEVI-compliant charging station composed of a total of four (4) DCFC CCS charging ports at the location listed in Table 2. The number of CCS charging ports per location is also specified in Table 2.

Table 2

Corridor Segment	Station Address	Number of CCS Charging Ports
15C	1497 Piper Ranch Rd, San Diego, CA 92154	4

- The total number of charging ports and the number of ports per station to be installed may be changed with prior Commission Agreement Manager (CAM) written approval. The CEC reserves the right to reduce the total grant amount in proportion to any reduction of the total number of charging ports to be installed.
- Operate the site for a minimum of five (5) years after the beginning of operation.
- Provide maintenance and support throughout the grant term with a warranty and maintenance program that achieves a minimum 97% station uptime.
- Achieve 25 percent small business participation.

APPROVAL TO COMMENCE WITH WORK

This Agreement will be reimbursed by federal funds under the NEVI Formula Program. The Federal Highway Administration (FHWA) must authorize funding for projects before match share or reimbursable expenditures may be incurred. Even where funds have already been obligated or work to be performed will not be reimbursable or will be done with match funds, it may still be necessary to obtain FHWA and Caltrans approval prior to commencing work.

The Recipient must receive written notice to proceed from the CAM before commencing with work on any task listed in this Scope of Work. CAM approval may be dependent on Caltrans or FHWA approval. No work may occur on any Task unless written notification to proceed is received, from the CAM, for that Task.

Even if the CAM gives approval for the Recipient to proceed with work on a Task, the project still may not move forward and any costs incurred by the Recipient are at their own risk.

For example, the CAM may approve the Recipient to use match funds to complete environmental review; adverse NEPA findings may be made; and the project may be unable to move forward despite the Recipient using their own resources to perform work.

As another example, the NEVI program may be halted by the FHWA. In that event, the CEC may be unable to reimburse the Recipient for work performed, despite having previously given approval to move forward with work.

TASK 1 ADMINISTRATION

Task 1.1 Kick-off Meeting

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement. The CAM shall designate the date and location of this meeting and provide an agenda to the Recipient prior to the meeting.

The CAM shall:

- Send the Recipient the *kick-off meeting agenda*

The Recipient shall:

- Attend a “Kick-Off” meeting that includes the CAM and may include 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* that no work has been completed using reimbursable or match funds prior to the execution of the agreement and FHWA’s authorization of the project (“E-76 approval”).
- Provide an *updated Schedule of Products, updated list of match funds, and updated list of permits*.
- Discuss the following administrative and technical aspects of this Agreement:
 - Agreement Terms and Conditions
 - Critical Project Review (Task 1.2)
 - Match fund documentation (Task 1.6). No reimbursable work may be done until this documentation is in place.
 - Permit documentation (Task 1.7)
 - Subawards and site host agreements needed to carry out project (Task 1.8)
 - Federal requirements including Davis-Bacon Act documentation (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)
 - Reporting (Task 6.3)

- Program Management Data Report (report template to be provided by CAM) (Task 8)
- EV Utilization Data Report (report template to be provided by CAM) (Task 8.1)
- Data Sharing Agreement (Task 8.2)
- Technical Products (Product Guidelines located in Section 5 of the NEVI Terms and Conditions)

CAM Product:

- Kick-Off Meeting Agenda

Recipient Products:

- Updated Schedule of Products
- Updated List of Match Funds (Private, Utility, Federal)
- Updated List of Permits
- Written Statement that no work has been done

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 *CPR meeting 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 NEVI 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:

- CPR meeting 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 NEVI 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, if applicable
- “Surviving” Agreement provisions
- Final invoicing and release of retention
- Provide *written documentation of meeting agreements*
- 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 and explain the Program Management Data Report Template during first monthly call and review with Recipient during subsequent 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.
- Complete the Program Management Data Report following the first monthly call and review and update with CAM during subsequent monthly calls as needed (Task 8)
- Provide verbal answers to the CAM during the call.
- *Send an email to CAM concurring with call summary notes.*

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 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 eligible project costs for reimbursement or match share under this Agreement. Match funds must be identified in writing and the associated commitments obtained before the Recipient can incur any costs for which the Recipient will request reimbursement. This Agreement must be executed and FHWA must authorize funding for projects before match share or reimbursable expenditures may be incurred. The CAM will provide a notice to proceed

to the Recipient once the required approvals are given for a task.

The Recipient shall:

- Prepare a *letter* documenting the match funding committed to this Agreement and submit it to the CAM at least two (2) working days prior to the kick-off meeting. 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 property, the Recipient shall identify its owner and provide a contact name, address and telephone number, and the address where the equipment or tangible property is located.
- Provide a *copy of the letter of match fund 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, including but not limited to, a *letter of new match fund commitment* to the CAM if during the course of the Agreement additional match funds are received.
- Provide the CAM *written notification* 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
- Copy(ies) of each match fund commitment letter(s)
- Letter(s) for new match fund commitment (if applicable)
- Written notification that match funds were reduced (if applicable)

Task 1.7 Identify and Obtain Required Permits

The goal of this task is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track. 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 two (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.
- Coordinate with CEC and Caltrans staff to verify if encroachment, right-of-way, or any other Caltrans permits will be required for any of the charging stations.
- 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 final 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 five (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 final 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)

Task 1.8 Obtain and Execute Subawards and Agreements with Site Hosts

The goal of this task is to ensure quality products and to execute subrecipient and site host agreements, as applicable, required to carry out the tasks under this Agreement consistent with the Agreement Terms and Conditions and the Recipient's own procurement and contracting policies and procedures.

The Recipient shall:

- Execute and manage subawards and coordinate subrecipient activities.
- 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.
- Submit a *letter* to the CAM describing the subawards and any site host agreements 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 to the CAM for review.
- If requested by the CAM, submit a *final copy of each executed subaward*.
- Submit a *final copy of each executed site host agreement*.
- If Recipient intends to add new subrecipients or change subrecipients, then the Recipient shall notify the CAM.

Products:

- Letter describing the subawards and any site host agreements needed, or stating that no subawards or site host agreements are required
- Draft subaward(s) (if requested)
- Final subaward(s) (if requested)
- Draft site host agreement(s) (if requested)
- Final site host agreement(s)

Task 1.9 Compliance with Federal Requirements

The goal of this task is to ensure compliance with all the federal requirements for work completed under this Agreement in a timely fashion to keep the Agreement on track. Failure to comply with federal requirements including Davis-Bacon Act may require repayment of grant funds under this Agreement. See Special Federal Award Terms and Conditions (Exhibit D Special Federal Terms and Conditions), subpart C., paragraph 4 for additional details.

The Recipient shall:

- Ensure that all laborers and mechanics employed by the Recipient, subrecipients, or vendors in the performance of construction, alteration, or repair work in excess of \$2,000, funded directly by or assisted in whole or in part by funds made available under this Agreement, shall be paid wages at rates not less than those prevailing on similar projects in the locality, as determined by the Secretary of Labor in accordance with subchapter IV of chapter 31 of title 40, United States Code commonly referred to as the “Davis-Bacon Act” (DBA).
- Obtain appropriate wage determinations from the Secretary of Labor or General Services Administration (sam.gov) as needed.
- Provide wage determinations at least 10 days prior to bid opening when subcontracting/making a subaward.
- When advertising for a public contract opportunity, Recipient must attach the applicable wage determinations to the solicitation, assistance agreement, and resulting contract or grant.
- Post wage rates and minimum wage rate posters onsite in a prominent and accessible place where they may easily be seen by employees.
- Collect, verify, and submit weekly to CEC all *payrolls for all laborers and mechanics employed or working on the project under this Agreement*, including those employed by the Recipient and any subrecipients or vendors. Include the *Fringe Benefit Statement* as needed.
- The payrolls submitted shall set out accurately and completely all of the information required to be maintained under 29 CFR Section 5.5(a)(3)(i), except that full social security numbers and home addresses shall not be included on weekly transmittals. Instead, the payrolls shall only need to include an individually identifying number for each employee (e.g., the last four digits of the employee's social security number).
- The Recipient is responsible for submittal of payrolls by all subrecipients and vendors under this Agreement.
- Each payroll submitted shall be accompanied by a “Statement of Compliance,” signed by the Recipient, subrecipient, or vendor, or his or her agent who pays or supervises the payment of the persons employed under the Agreement, and shall certify the following:

- That the payroll for the payroll period contains the information required to be provided under Section 5.5 (a)(3)(ii) of Regulations, 29 CFR part 5, the appropriate information is being maintained under Section 5.5 (a)(3)(i) of Regulations, 29 CFR part 5, and that such information is correct and complete.
- That each laborer or mechanic (including each helper, apprentice, and trainee) employed on the Agreement during the payroll period has been paid the full weekly wages earned, without rebate, either directly or indirectly, and that no deductions have been made either directly or indirectly from the full wages earned, other than permissible deductions as set forth in Regulations, 29 CFR part 3.
- That each laborer or mechanic has been paid not less than the applicable wage rates and fringe benefits or cash equivalents for the classification of work performed, as specified in the applicable wage determination.
- Ensure compliance with all applicable federal requirements, including and not limited to Davis-Bacon and related Acts.
- Collect, verify, and submit *other documentation of compliance with federal requirements*, as applicable and as needed. Provide daily construction site reports or similar to support verification of certified payroll records.

Products:

- Copies of weekly certified payrolls, including a Fringe Benefit Statement as needed
- Other documentation of compliance with federal requirements as needed

TECHNICAL TASKS

TASK 2 ENVIRONMENTAL REVIEW AND ENGINEERING

The goal of this task is to coordinate environmental review and complete preliminary charging station engineering for each charging station.

Site Changes: The CAM must approve any requested site changes.

The Recipient shall:

- Follow the Caltrans acquisitions process detailed in the Local Assistance Procedures Manual (LAPM) and Right of Way Manual as applicable.
- Prepare and submit to the CAM a *Site Assessment* of the charging station, for each charging station, which shall include, but not be limited to:
 - Evaluating site electrical capacity, including utility interconnection,

- service drop, transformer sizing, service activation, and billing procedures
 - Confirming optimal positioning of station equipment for best visibility, convenience, safety, and minimization of install costs
 - Assuring wireless communication suitability
 - As needed, perform a site survey to ensure that installation of charging equipment and associated infrastructure falls within the site host's land boundaries and does not fall within rights-of-way or easements
- Coordinate with CEC and Caltrans staff to complete all work necessary to complete National Environmental Policy Act (NEPA) compliance. This includes, but is not limited to, submitting a *completed PES Form/Exhibit 6-A* in Caltrans' LAPM.
- Finalize and submit to the CAM an engineer and utility-approved *Site Drawing* for each charging station.
- Receive NEPA approval (from Caltrans) prior to commencing with moving to Right of Way (Task 3).

Products:

- Site Assessment for each charging station
- Completed PES Form/Exhibit 6-A
- Site Drawing for each charging station

TASK 3 RIGHT OF WAY

The goal of this task is to conduct work to identify and secure necessary real property interests for the project and secure Right of Way Certification for the charging station. The Right of Way Certification is to document that real property interests have been or are being secured, and physical obstructions, including buildings, utilities, and railroads, have been or will be removed, relocated, or protected as required for the construction, operation, and maintenance of the proposed federally funded project. The Right of Way Certification also documents that right of way activities were conducted in accordance with applicable policies and procedures outlined in the Caltrans Local Assistance Procedure Manual (LAPM). The Recipient must provide proof of receiving NEPA approval (Task 2), provide an executed site host agreement for each charging station (Task 1.8), and receive written approval from the CAM before proceeding with this task.

The Recipient shall:

- Review right of way records and identify the need, if any, for additional right of way for each charging station.
- Identify the needed, if any, real property interests for each charging station.

- Prepare and submit to the CAM a *Property Interest Summary Report* which shall include, but not be limited to, details on necessary real property interests for each charging station, the grantor or authorized agent for each real property interest, and the anticipated timeline for finalizing each real property interest.
- Coordinate with the CAM to determine the project's right of way impacts, if any.
- Prepare a *draft of Right of Way Certification Form 13-B(NEVI)* for each charging station and submit it to the CAM.
- Coordinate with the CAM to ensure Right of Way Certification Form 13-B(NEVI) is completed to the satisfaction of the CEC.
- Receive Right of Way Certification approval prior to commencing with construction-related activities (Task 4 and Task 5).

Products:

- Property Interest Summary Report
- Draft Right of Way Certification Form 13-B(NEVI) for each charging station

TASK 4 SITE PREPARATION AND EQUIPMENT PROCUREMENT

The goal of this task is to prepare each charging station for construction. The Recipient must receive Right of Way Certification approval (Task 3) and written approval from the CAM before commencing with this task.

[A CPR meeting is scheduled to be held during this task and additional CPR meetings may be scheduled if necessary.]

The Recipient shall:

- Prepare and submit to the CAM an *Installation Plan* for each charging station, which shall include, but not be limited to:
 1. The site host business name
 2. The site host address
 3. The equipment being installed
 4. The name of the project manager for the site
 5. The planned installation schedule
- Procure all required equipment for installation after the Installation Plan is submitted and the CAM has provided written approval to proceed with procurement.
- Procure all necessary materials for construction.
- Verify safety, shelter, access, ADA compliance, signage, and lighting requirements are met.

- Coordinate site project kick-off meeting with host, suppliers, subrecipients, vendors, and local authority having jurisdiction for each charging station.
- Meet with project partners to track and evaluate project progress, goals, barriers, and project approach.
- Prepare and submit to the CAM a *Data Management and Cybersecurity Plan* prior to the commissioning of any station. The Data Management and Cybersecurity Plan must include the Recipient's data security policies, procedures, and remediation plan. The plan should include, at minimum, the following:
 1. Strong authentication and access control
 2. Network segmentation to isolate critical components to limit attack
 3. Intrusion detection and monitoring
 4. Integrating cybersecurity measures at the hardware level
 5. Firmware integrity of chargers
 6. User data privacy and protection
 7. Secure data transfer and protection at rest
 8. Secure communications protocols
 9. Payment systems
 10. Cloud protections
 11. System and data access management to ensure only authorized individuals have access
 12. Employee cybersecurity training
 13. Patching and updates
 14. Incident response reporting and recovery, including a communications plan
 15. Audits and assessments
 16. Continuity of operations
 17. Risk acceptance and mitigation
 18. Disaster recovery
- Prepare and submit to the CAM a *Written Notification of Readiness to Begin Installation* for each charging station that declares each site is completed with preconstruction and engineering activities and ready to move forward with the installations.

Products:

- Installation Plan for each charging station
- Data Management and Cybersecurity Plan

- Written Notification of Readiness to Begin Installation for each charging station

TASK 5 CHARGING STATION CONSTRUCTION AND COMMISSIONING

The goal of this task is to construct each charging station, ensure all equipment meets the solicitation and federal NEVI requirements, and commission each charging station for public use. The Recipient must receive Right of Way Certification approval (Task 3) and written approval from the CAM before commencing with this task.

[A CPR meeting is scheduled to be held during this task and additional CPR meetings may be scheduled if necessary.]

The Recipient shall:

- Utilize the *Site Assessments*, *Site Drawing*, and *Installation Plans* from Tasks 2 and 4 to prepare each charging station for installation work.
- Inform Caltrans of installation schedule to initiate preparation of highway signage.
- Install at each charging station charging equipment that meets the following specifications:
 - At least four (4) charging ports that can simultaneously supply at least 150 kW each to a vehicle, for a total of four (4) charging ports at one charging station.
 - Each charging port must support output voltages between 250 volts direct current (DC) and 920 volts DC.
 - Each charging port must have at least one permanently attached CCS connector. Additional connector types such as SAE J3400 are allowed to be installed if the previous requirement is still met.
 - Each connector should be rated with a current carrying capacity of greater than or equal to 375 Amps.
 - The chargers must conform to ISO 15118-3, and hardware must be capable of implementing both ISO 15118-2 and ISO 15118-20.
 - The chargers must include all necessary software and hardware to perform Plug-and-Charge using ISO 15118-2.
 - Conformance testing for charger software and hardware should follow ISO 15118-4 and 15118-5, respectively.
 - The chargers must conform to OCPP 2.0.1 or later. Manufacturers must attest that the charger conforms to OCPP 2.0.1 or later by detailing it on a publicly available charger specification sheet.
 - The charger's networking software must connect to a central management system using OCPP 2.0.1 for the purposes of charger management and data reporting, including for reliability data reporting requirements.

- The charging network must be capable of communicating with other charging networks in accordance with the Open Charge Point Interface (OCPI) 2.2.1.
- The chargers must be designed to securely switch network providers without any changes in hardware.
- The chargers must be networked and must include the following three abilities:
 1. Have network connectivity with one of the following:
 - IEEE 802.11n for high-bandwidth wireless networking, or
 - IEEE 802.3 for Ethernet for local- or wide-area network applications
 2. Be able to receive remote software updates, real-time protocol translation, encryption, and decryption, including:
 - Internet Protocol (IP)-based processor which must support multiple protocols, and
 - Compliance with Transmission Control Protocol (TCP)/IP and IPv6.
 3. Be able to connect to a network's back-end software.
- An Occupational Safety and Health Administration Nationally Recognized Testing Laboratory must have certified the charging equipment.
- Submit to the CAM an *AB 841 Certification* that certifies the project has complied with all AB 841 (2020) requirements specified in the NEVI Terms and Conditions (please see section 31) or describes why the AB 841 requirements do not apply to the project. The Recipient's authorized representative shall sign the certification.
- Submit to the CAM *Electric Vehicle Infrastructure Training Program (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.
- Ensure all electric vehicle supply equipment (EVSE) installed for commercial use has a type approval certificate issued through the California Type Evaluation Program (CTEP) administered by the California Department of Food and Agriculture Division of Measurement Standards or Certificate of Conformance issued by the National Type Evaluation Program (NTEP) administered through the National Conference on Weights and Measures. California accepts NTEP certificates so long as the device also meets CCR Title 4, Section 4002.11.

- Unless otherwise updated by the CDFA DMS, ensure installation, repair, or maintenance on commercial EVSE is performed by a Registered Service Agency (RSA) and after the device is placed in service, the RSA must report this information to the county within 24 hours. Device owners are responsible for registering their device with the county.
- Purchase a networking agreement for each charging port installed. The term of the networking agreement must cover at least five (5) years of operations. If Recipient is a charging network provider, the Recipient is not required to obtain a networking agreement.
- Prepare and submit to the CAM a *Build America, Buy America Compliance Report* which must document compliance with the Federal NEVI Build America, Buy America requirement.
- Assure each charging station and their associated chargers are accessible to the public 24 hours per day, 7 days per week, year-round (24/7/365).
- Coordinate utility interconnection, service drop, transformer sizing, service activation, and billing.
- Create and submit a *Signage Report* which may include, but is not limited:
 - Trailblazer signage that clearly identifies the route from the freeway to the station(s),
 - Which jurisdiction(s) and/or agency(ies) the Recipient must coordinate with to deploy the trailblazer signage for each charging station,
 - Signage that clearly identifies the charging site location to an approaching driver from any ingress,
 - Signage that identifies parking is for EVs only,
 - Signage that states non-EVs may be towed (if applicable),
 - Signage that that informs drivers of price per unit of measure,
 - Signage required for EV driver accessibility, and
 - Any additional signage that may be required by federal, state, or local laws, regulations, and ordinances.
- Send a copy of the *Signage Report* to each local jurisdiction identified in the Report.
- Install signage in accordance with the *Signage Report* to the extent possible given local jurisdictions' requirements and Caltrans requirements.
- Create and submit to the CAM *Written Training Materials* for the charging station equipment at each charging station. These materials may include, but are not limited to, how to operate the equipment, how to troubleshoot the equipment, who to contact for specific questions or issues, and site host requirements may be detailed in the site license agreement. Site host

requirements may include, but not be limited to, restroom availability and cleanliness, 24/7/365 public access to the charging station, and keeping the charging station well-lit and clean.

- Deliver *Written Training Materials* for the charging station to each charging station site host, who should always keep the Written Training Materials at the charging station.
- Provide training to site hosts based on the *Written Training Materials*.
- Perform final inspections and make corrections if necessary.
- Commission each charging station by verifying each installation was completed in accordance with its Site Drawings and Installation Plan completed in Task 4, the Federal NEVI requirements, and overall requirements of this Solicitation.
- Submit each charging station's information to the Alternative Fuels and Data Center, at a minimum. The Recipient may provide the information to additional charging station location programs as seen fit.
- Prepare and submit to the CAM, the *Written Notification of Intent to Operate* for each charging station that declares installation for the site has been completed, the final inspection card has been received, the site has been commissioned, and is available to the public for use.

Products:

- AB 841 Certification
- EVITP Certification Numbers for all electricians installing EVSE
- Build America, Buy America Compliance Report
- Signage Report
- Written Training Materials
- Written Notification of Intent to Operate for each charging station

TASK 6 OPERATIONS AND RELIABILITY

The goal of this task is to reliably operate the EV charging stations and provide information to measure and verify reliability.

Recipient shall comply with the reliability performance standards, recordkeeping, reporting, and maintenance requirements (Requirements) for EV chargers installed as part of this Agreement, excluding any charger used solely for private use at a single-family residence or a multifamily housing unit with four or fewer units. In the event the CEC adopts regulations that include Requirements, for example as required by AB 2061 (Chapter 345, Statutes of 2022) and/or AB 126 (Chapter 319, Statutes of 2023), those Requirements shall supersede the Requirements contained in this Scope of Work for this Agreement wherever, as determined by the CAM, they conflict or are redundant.

[A CPR meeting is scheduled to be held during this task and additional CPR meetings may be scheduled if necessary.]

Task 6.1 Operations

- **Operational requirement for all chargers:** The Recipient shall operate charging ports installed as part of this Agreement during the term of this Agreement.
- **Communication of charging price:** The Recipient shall ensure price is communicated to customers as prescribed in 23 CFR 680.116(a).
- **Uptime requirement for all chargers:** The Recipient shall ensure that the charging port uptime for each charging port installed in the project is at least 97 percent of each year for five years after the beginning of operation.
- **Successful charge attempt rate (SCAR) requirement for networked chargers:** The Recipient shall ensure that the charging port SCAR for each charging port installed in the project is at least 90 percent for each year for five years after the beginning of operation.
- **Maintenance requirements for all chargers:** The Recipient shall:
 - Conduct preventive maintenance, as specified by the charger manufacturer, on the charger hardware by a certified technician annually. The time interval between consecutive preventive maintenance visits to any charger shall be no more than 13 months.
 - Complete corrective maintenance within 5 business days of the beginning of a time when the charger or charging port is inoperative or exhibiting failures that result in an inability to charge.
- **OCPP requirements for networked chargers:** The Recipient shall retain the services of a charging network provider that meets the bulleted criteria below to record, retain, and transmit the Remote Monitoring data for networked chargers specified in Task 6.2.
 - The charging network provider must have an API of the CEC's choosing to permit the charging network provider to transfer the data required in this section directly to the CEC or the CEC's designee within 60 minutes of the record's generation.
 - The charging network provider must have Subset Certification of the Charging Station Management System in the Open Charge Alliance OCPP Certification Program for OCPP version 2.0.1, published May 24, 2023, or a subsequent version of OCPP for Core, Advanced Security, and ISO 15118 Support functionalities.

- The charging network provider's central system must have connection to the chargers using OCPP version 2.0.1 or a subsequent version of OCPP. This does not preclude the additional use of other communication protocols.
- The charging network provider and chargers must transmit the following protocol data units between the Central Management System and the charger(s) as specified in OCPP version 2.0.1 or a subsequent version of OCPP:
 - AuthorizeRequest shall be transmitted to the Central Management System by the charger.
 - AuthorizeResponse shall be transmitted by the Central Management System to the charger.
 - BootNotificationResponse shall be transmitted by the Central Management System to the charger in response to any received BootNotificationRequest.
 - HeartbeatRequest shall be transmitted to the Central Management System by the charger on a set interval.
 - HeartbeatResponse shall be transmitted to the charger by the Central Management System in response to any received HeartbeatRequest.
 - RequestStartTransactionRequest shall be transmitted by the Central Management System to the charger as specified in OCPP 2.0.1 or a subsequent version of OCPP.
 - StatusNotificationRequest shall be transmitted by the charger to the Central Management System any time the charger or an associated charging port's operative status changes.
 - TransactionEventRequest shall be transmitted to the Central Management System by the charger as specified in OCPP 2.0.1 or a subsequent version of OCPP.
 - The optional field meterValue must be populated when the eventType field is set to either "Started" or "Ended."
 - When populated, the sub-subfield Value of the subfield SampledValue of the field meterValue shall be transmitted in Watt-hours (Wh).
 - When populated, the sub-sub-subfield unit of the sub-subfield unitOfMeasure of the subfield SampledValue of the field meterValue shall be set to the default string, "Wh."

- When populated, the sub-sub-subfield multiplier of the sub-subfield unitOfMeasure of the subfield SampledValue of the field meterValue shall be set to the default integer, 0 (zero).
- When the meterValue field is populated, the measurand sub-subfield of the SampledValueType subfield, of the field meterValue shall be populated as specified in OCPP 2.0.1 or a later version.

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 the beginning of operation 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 6.2 Recordkeeping and Transmittals

The goal of this task is to collect, maintain, and transmit records of charging port operation and reliability and provide them to the CEC.

The Recipient shall:

- **For networked chargers**, ensure the charging network provider collects and retains the Remote Monitoring data below from each charging port installed and operated as part of this Agreement.
- **For networked chargers**, ensure the charging network provider automatically transmits the Remote Monitoring data below to the CEC, via API, within 60 minutes of the Remote Monitoring data's generation. Transmittals must begin within one month of the charger becoming operational.
- **For networked chargers**, ensure the charging network provider retains the Remote Monitoring data below for 2 years from the date of each record's generation. Provide *Remote Monitoring records* to the CEC within 10 business days of request.
 - Provide digital records in a comma separated values file unless another file format is approved by the CEC for the request.
 - Provide a clear and understandable *Data Dictionary* that describes each data element and any associated units with all digital records.
 - **Remote monitoring data for networked chargers**, which will serve as the foundation for the *Remote Monitoring records* that must be submitted include:
 - All instances of the following Protocol Data Units, specified in OCPP 2.0.1, that are transmitted between the charger and the central system.
 1. AuthorizeRequest

2. AuthorizeReponse
 3. BootNotificationRequest
 4. HeartbeatResponse
 5. RequestStartTransactionRequest
 6. StatusNotificationRequest
 7. TransactionEventRequest
- **For all chargers**, collect and retain the maintenance records specified below for each charging port installed and operated as part of this Agreement for five years from the date the charging port begins operation. Provide *Maintenance Records* to the CEC within 10 business days of request.
 - **Maintenance Records, for all chargers, Recipient shall collect and retain:**
 - Reports of inoperative charging ports or charging port failures resulting in inability to charge, such as a customer complaint, internal diagnostics, or inspection.
 - Records of any maintenance conducted on charging ports installed and operated as part of the agreement. Records should specify the following:
 1. Date and time of the maintenance event.
 2. Whether maintenance was corrective or preventive in nature.
 3. Whether and for how long the charging port was in an inoperative state prior to maintenance.
 4. Whether the charging port was in an operative state following maintenance.

Products:

- Remote Monitoring Records
- Data Dictionary
- Maintenance Records

Task 6.3 Reporting

The goal of this task is to provide reports on charger reliability and maintenance.

The Recipient shall:

- **For each charger**, after the charger becomes operational, prepare and submit to the CEC *Quarterly Reports on Charger and Charging Port Reliability and Maintenance*. This report must conform to a format approved by the CEC and is provided for five years after the charging ports are operational. Each report must include:
 - A summary of charging port downtime, including total downtime and the number and frequency of downtime events, the minimum, median, mean, and maximum duration, and the causes of downtime events. Downtime shall be determined on a per charging port basis by summing the durations of all downtime events during the reporting period. The duration of a downtime event shall be the longest of the following periods:
 - **For networked charging ports**, the time after the charger has transmitted a StatusNotificationRequest indicating that the charging port associated with that charger is in a “faulted” or “unavailable” state until a subsequent StatusNotificationRequest is transmitted by that charger indicating that the charging port has transitioned to an “available,” “occupied,” or “reserved” state. The timestamps in each StatusNotificationRequest shall be used to quantify downtime.
 - **For networked chargers**, the time between a BootNotificationResponse transmitted by the Central Management System and the last HeartbeatResponse transmitted by the Central Management System prior to the BootNotificationResponse. The timestamps in the relevant BootNotificationResponse and HeartbeatResponse shall be used to quantify downtime.
 - **For all charging ports**, the time between the earliest record that a charging port is not capable of successfully dispensing electricity or otherwise not functioning as designed and the time it is available to deliver a charge. First record that a charger is not capable of successfully dispensing electricity or otherwise not functioning as designed includes, but is not limited to, consumer notification, internal diagnostics, or inspection, whichever is earliest.
 - A summary of excluded downtime, including total excluded downtime and the number and frequency of excluded downtime events, the minimum, median, mean, and maximum duration, and the causes of excluded downtime events. ‘Excluded Downtime’ includes:
 - **Before Initial Installation:** Downtime before the charging port was initially installed.

- **Grid Power Loss:** Downtime during which power supplied by a third-party provider is not supplied at levels required for minimum function of the charging port. This may include, but is not limited to, service outages due to utility equipment malfunction or public safety power shutoffs. This does not include power generation or storage equipment installed to serve the charger(s) exclusively. Documentation from power provider detailing outage is required to claim this as excluded downtime.
- **Outage for Preventative Maintenance or Upgrade:** Downtime caused by any preventative maintenance or upgrade work that takes the charging port offline. This must be scheduled at least two weeks in advance of the charger being placed in an inoperative state. The maximum downtime that can be excluded for preventative maintenance or upgrade work is 24 hours for any 12-month period.
- **Vandalism or Theft:** Downtime caused by any physical damage to the charger or station committed by a third party. This may include, but is not limited to, theft of charging cables, damage to connectors from mishandling, or damage to screens. A maximum of 5 days may be claimed as excluded downtime for each Vandalism or Theft event. A police report or similar third-party documentation is required to claim this as excluded time.
- **Natural Disasters:** Downtime caused by any disruption of the charging port due to a natural event such as a flood, earthquake, or wildfire that causes great damage. Third party documentation such as news reporting must be provided along with a narrative of the direct impacts to the charger(s) to claim this as excluded downtime.
- **Communication Network Outages:** Downtime caused by loss of communication due to cellular or internet service provider system outages. A Communication Network Outage can be claimed as excluded downtime provided the chargers default to a free charge state during communication losses. A free charge state is when the charger is operational and dispenses energy free of charge to any consumer.
- **Operating Hours:** Hours in which the charging port is in an operative state but that are outside of the identified hours of operation of the charging station.
- A summary and calculation of uptime. Each report shall include the uptime percentage of each charging port (Uptime) installed and operated as part of this Agreement for the reporting period. Charging port uptime shall be calculated as:

$$U = \frac{T - D + E}{T} * 100\%$$

U = Charging Port Uptime

T =

1. Q1 reporting period = 129,600 minutes, except for a leap year, which is 131,040 minutes.
2. Q2 reporting period = 131,040 minutes.
3. Q3 and Q4 reporting periods = 132,480 minutes.

D = Total charging port downtime for the reporting period, in minutes.

E = Total charging port excluded downtime in the reporting period, in minutes.

- **For networked charging ports**, a charge attempt summary for each charging port. The charge attempt summary shall include, as defined below, the total number of charge attempts, the total number of successful charge attempts, the total number of failed charge attempts, and the successful charge attempt rate for the reporting period.

- **Charge Attempt.** A charge attempt occurs upon transmission of one or more of the protocol data units identified in following subsections (a) through (g) between the Central Management System and the charger as specified in OCPP Version 2.0.1 or a subsequent version of OCPP. Any number of the protocol data units described in (a) through (g) of this subsection timestamped within a three-minute interval shall be counted as one charge attempt. Any number of TransactionEventRequest described in (d) through (g) of this subsection transmitted with identical identifier strings in the transactionId subfield of the transactionInfo field shall be counted as one charge attempt.

- (a) An AuthorizeRequest message transmitted by the charger to the Central Management System.

The AuthorizeRequest message shall not count as a charge attempt if the Central Management System responds with an AuthorizeResponse message with the status subfield of the idTokenInfo field set to any of the following responses:

1. “Blocked”
2. “ConcurrentTx”
3. “Expired”

4. "Invalid"
5. "NoCredit"
6. "NotAllowedTypeEVSE"
7. "NotAtThisLocation"
8. "NotAtThisTime"
9. "Unknown"

- (b) A RequestStartTransactionResponse message transmitted by Central Management System charger to the charger Central Management System with the status field set to "Accepted"
- (c) A RequestStartTransactionResponse message transmitted by charger to the Central Management System with the status field set to "Rejected" A StatusNotificationRequest message transmitted by the charger to the Central Management System with the connectorStatus field set to "Occupied"
- (d) A TransactionEventRequest message transmitted by the charger to the Central Management System with the eventType field set to "Started" and the triggerReason field set to "CablePluggedIn"
- (e) A TransactionEventRequest message transmitted by the charger to the Central Management System with the triggerReason field set to "CablePluggedIn"
- (f) A TransactionEventRequest message transmitted by the charger to the Central Management System with the chargingState subfield of the transactionInfo field set to "EVConnected"
- (g) A TransactionEventRequest message transmitted by the charger to the Central Management System with the chargingState subfield of the transactionInfo field set to "Charging"

- **Charging Session.** A charging session begins and ends as follows:

- (a) A charging session begins when the charger transmits TransactionEventRequest to the Central Management System with the chargingState subfield of the transactionInfo field set to "Charging."
 - In the event that multiple TransactionEventRequest protocol data units

are transmitted with the chargingState subfield of the transactionInfo field set to 'Charging' AND identical identifier strings in the transactionId subfield of the transactionInfo field, the charging session shall begin when the first of those protocol data units are sent. Which protocol data unit was sent first shall be determined based on the lowest value in the seqNo field.

- (b) A charging session ends when the charger transmits a subsequent TransactionEventRequest to the Central Management System with the chargingState subfield of the transactionInfo field set to any of the following values:
 - “EVConnected”
 - “SuspendedEV”
 - “SuspendedEVSE”
 - “Idle”
- (c) The identifier string contained in the transactionId subfield of the transactionInfo field must be identical in the messages described in (a) and (b) of this subsection.
- (d) The date and time found in the timestamp field of the messages described in (a) and (b) of this subsection shall be used to determine the start and stop time of a charging session.

- **Successful Charge Attempt.** A successful charge attempt is a charge attempt that is followed by either (a) or (b) of this subsection prior to another charge attempt.

- (a) A charging session that lasts for 5 minutes or longer as determined by the timestamps described above.
- (b) The stoppedReason subfield of the transactionInfo field of the TransactionEventRequest protocol data unit ending the charging session is set to one of the following:
 - “EnergyLimitReached”
 - “Remote”
 - “Local”
 - “SOCLimitReached”

- **Failed Charge Attempt.** A failed charge attempt is any charge attempt that is not followed by a successful charge attempt prior to a subsequent charge attempt.
- **Successful Charge Attempt Rate.** The successful charge attempt rate for a charging port shall be calculated using the following formula:

$$SCAR = \frac{CA - FCA}{CA} * 100\%$$

Where:

SCAR = Successful Charge Attempt Rate

CA = Total Charge Attempts for the reporting period

FCA = Total Failed Charge Attempts for the reporting period

- **For all chargers,** a summary of the total number of maintenance dispatch events that occurred since the last report, the number of days to complete each maintenance event reported, and a narrative description of significant maintenance issues. Include details of all excluded downtime and a narrative description of events that caused the excluded downtime. Include the summary in each Quarterly Report on Charger and Charging Port Reliability and Maintenance.

Product:

- Quarterly Report on Charger and Charging Port Reliability and Maintenance, submitted in a manner specified by the CEC for five years after charging ports are operational.

TASK 7 SEMI-ANNUAL ELECTRIC VEHICLE CHARGER INVENTORY REPORTS

The goal of this task is to provide information on the total number of chargers in the Recipient's charging network in California, including both public and shared private, serving all vehicle sectors (light-, medium-, and heavy duty) excluding any charger used solely for private use at a single-family residence or a multifamily housing unit with four or fewer units. In the event the CEC adopts regulations that include Requirements, for example as required by AB 2061 (Chapter 345, Statutes of 2022) and/or AB 126 (Chapter 319, Statutes of 2023), those Requirements shall supersede the Requirements contained in this Scope of Work for this Agreement wherever, as determined by the CAM, they conflict or are redundant.

The Recipient shall:

- Prepare an *Electric Vehicle Charger Inventory Report*, in a template provided by the CAM, on the total number of chargers in the Recipient's charging network in California that includes:

- For chargers serving light-duty electric vehicles:
 - Number of public AC charging ports aggregated at the county level by charging network provider
 - Number of shared private AC charging ports aggregated at the county level by charging network provider
 - Number of public DC fast charging ports aggregated at the county level by charging network provider
 - Number of shared private DC fast charging ports aggregated at the county level by charging network provider
- For chargers serving medium- and/or heavy-duty vehicles:
 - Number of public AC charging ports aggregated at the county level by charging network provider
 - Number of shared private AC charging ports aggregated at the county level by charging network provider
 - Number of public DC fast charging ports aggregated at the county level by charging network provider
 - Number of shared private DC fast charging ports aggregated at the county level by charging network provider
 - Number of other publicly available charging ports at the county level by charging network provider
 - Number of other depot charging ports by power output (less than 50 kilowatts (kW), between 50 – 150 kW, 150 kW – 350 kW, 350 kW and above) at the county level by charging network provider (if applicable)
- Submit the *Electric Vehicle Charger Inventory Report* to the CAM, no later than 30 calendar days after the Agreement is executed and then each calendar half-year thereafter. Reports are due at the end of July and end of January.

Product:

- Electric Vehicle Charger Inventory Report

TASK 8 OTHER DATA COLLECTION AND ANALYSIS

The goal of this task is to collect operational and programmatic data from the project. In the event the CEC adopts regulations that include Requirements, for example as required by AB 2061 (Chapter 345, Statutes of 2022) and/or AB 126 (Chapter 319, Statutes of 2023), those Requirements shall supersede the Requirements contained in this Scope of Work for this Agreement wherever, as determined by the CAM, they conflict or are redundant.

The Recipient shall:

- Prepare and provide a *Program Management Data Report* in a format chosen by the CEC following the first monthly call (Task 1.4) and update during subsequent monthly calls as needed.
- Collect and provide the following programmatic data for all electric vehicle chargers and include in the *Program Management Data Report*. The programmatic data shall include, but not be limited to the following:
 - Electric Vehicle Charger Information:
 - Funding
 - The subsidy from a federal program, utility program, and private funding
 - Vehicles
 - Primary Vehicle Type served such as light duty (GVWR ≤ 10,000), medium duty (10,000 < GVWR ≤ 26,000), heavy duty (GVWR > 26,000)
 - Milestone Dates
 - Key milestone dates, such as permit request and received date, charger energization date, charger operational date, and other dates as requested by the CAM
 - Location
 - Primary site access type such as publicly available, shared private, private
 - Location/site use type, such as hotel, restaurant, or multi-unit housing
 - Charger address
 - Parking location type, such as street, parking lot or parking garage
 - Other Equipment (as applicable)
 - Battery Energy Storage CEC cost and kWh capacity
 - Non-battery Distributed Generation CEC cost, kW capacity and type
 - ZEV Infrastructure Information:
 - Charger Information
 - Charger make and model, serial number, level (Level 1, Level 2, DCFC, MCS), nameplate capacity (kW), number ports per charger

Products:

- Program Management Data Report

TASK 8.1 Utilization

The Recipient shall:

- Collect and provide to the CAM, at minimum, quarterly utilization data from the project for all installed chargers in an *EV Utilization Data Report*, in the format of the CEC's choosing, for three years after the charging ports are operational, including, but not limited to:
 - EV Charging Port:
 - Charging network provider name
 - Charger site address, city, zip code
 - Charger make, model, and manufacturer serial number
 - EV service equipment charger and charging port ID
 - Peak Power (kW)
 - Charging session start/end date and times
 - Charging session energy consumed (kW)
 - Plug in/un-plugged timestamp Coordinated Universal Time (UTC)
 - Charging interval peak demand
 - Charging interval start/end times
 - Charging interval energy consumed
 - If a bidirectional charger, energy (kWh) discharged back to grid or facility
 - Total transacted amount
 - Payment method

Products:

- EV Utilization Data Report provided, at a minimum, quarterly for three years after charging ports are operational.

TASK 8.2 Data Sharing Agreement

The goal of this subtask is to ensure a data sharing agreement with the parameters outlined below is in place for the purposes of facilitating data collection and reporting on EV charging ports.

The Recipient shall:

- Enter into a data sharing agreement with a charging network provider that shall include the following, and if the Recipient is a charging network provider, the Recipient shall enter into a data sharing agreement with the CEC that shall include the following:
 - The charging network provider fulfills all the data collection and reporting requirements described in Task 6.2, Recordkeeping and Transmittals (Excluding Maintenance Records), Task 6.3 Reporting, Task 7 SEMI-ANNUAL ELECTRIC VEHICLE CHARGER INVENTORY REPORTS, and Task 8.1 Utilization, on behalf of Recipient
 - The charging network provider's reports adhere to CEC-approved formatting, report templating, and delivery methods.
 - CEC is identified as a third-party beneficiary to the data sharing agreement.
- Be responsible for ensuring the charging network provider fulfills all requirements described in the data-sharing agreement.
- Submit the *dually signed data-sharing* agreement to the CEC within 30 calendar days of selecting a charging network provider and no later than when the first charging port under this agreement is energized.
- Notify the CAM in writing within 30 calendar days if Recipient changes its selected charging network provider's selection.
- If a new charging network provider is selected, the new dually signed data-sharing agreement shall be submitted to the CEC within 30 calendar days of the charging network provider's selection.

Products

- Dually signed data-sharing agreement.

TASK 8.3 GHG Intensity Reporting

The Recipient shall:

- For electric vehicle chargers: collect and report the source and greenhouse gas emissions intensity, on an annual basis, of the electricity used and dispensed by the EV charging station(s) at the meter, consistent with the disclosure methodology set forth in Article 14 (commencing with Section 398.1) of Chapter 2.3 of Part 1 of Division 1 of the Public Utilities Code. Data must be reported to the CEC semiannually in the GHG Intensity Report specified by the CAM.

Product:

GHG Intensity Report

TASK 9 FEDERAL DATA REPORTING

The goal of this task is to provide and report data as specified in 23 CFR 680.

The Recipient shall:

- Collect, maintain, and report *data* for at least five (5) years to the Joint Office of Energy and Transportation as prescribed in 23 CFR 680.112. Data Submittal. The data listed below shall be submitted to the CEC via the [Electric Vehicle Charger Analytics and Reporting Tool](https://driveelectric.gov/evchart) , (EV-ChART) online platform, found at <https://driveelectric.gov/evchart>, or in the manner prescribed by FHWA, if no longer EV-ChART. All data must be formatted and prepared in accordance with the [EV-ChART Data Format and Preparation Guidance](#), or any superseding FHWA guidance
 - Submit the following data on a quarterly basis to EV-ChART or in the manner prescribed by FHWA:
 - Charging station identifier that the following data can be associated with. This must be the same charging station name or identifier used to identify the charging station in data made available to third-parties in § 680.116(c)(1).
 - Charging port identifier. This must be the same charging port identifier used to identify the charging port in data made available to third-parties in § 680.116(c)(8)(ii).
 - Charging session start time, end time, and any error codes associated with an unsuccessful charging session by charging port.
 - Energy (kWh) dispensed to EVs per charging session by charging port.
 - Peak session power (kW) by port.
 - Payment method associated with each charging session.
 - Charging station port uptime, T_outage, and T_excluded calculated in accordance with the equation in § 680.116(b) for each of the previous 3 months.
 - Duration (minutes) of each outage.
 - Submit the following data on an annual basis on or before March 1 to EV-ChART or in the manner prescribed by FHWA:
 - Maintenance and repair cost per charging station for the previous year.

- For private entities identified in paragraph (c)(1) of this section, identification of and participation in any State or local business opportunity certification programs including but not limited to minority-owned businesses, Veteran-owned businesses, woman-owned businesses, and businesses owned by economically disadvantaged individuals.
- Submit the following data one time, as soon as available, to EV-ChART or in the manner prescribed by FHWA:
 - The name and address of the private entity(ies) involved in the operation and maintenance of chargers.
 - Distributed energy resource installed capacity, in kW or kWh as appropriate, of asset by type (e.g., stationary battery, solar, etc.) per charging station.
 - Charging station real property acquisition cost, charging equipment acquisition and installation cost, and distributed energy resource acquisition and installation cost.
 - Aggregate grid connection and upgrade costs paid to the electric utility as part of the project, separated into:
 - Total distribution and system costs, such as extensions to overhead/underground lines, and upgrades from single-phase to three-phase lines.
 - Total service costs, such as the cost of including poles, transformers, meters, and on-service connection equipment.
- Provide *third-party data sharing* as prescribed in 23 CFR 680.116(c). Make available, free of charge, to third-party software developers, via API:
 1. Unique charging station name or identifier
 2. Address (street address, city, state, and zip code) of the property where the charging station is located
 3. Geographic coordinates in decimal degrees of exact charging station location
 4. Charging station operator name
 5. Charging network provider name
 6. Charging station status (operational, under construction, planned, or decommissioned)
 7. Charging station access information:
 - (i) Charging station access type (public or limited to commercial vehicles)

- (ii) Charging station access days/times (hours of operation for the charging station)
- 8. Charging port information:
 - (i) Number of charging ports
 - (ii) Unique port identifier
 - (iii) Connector types available by port
 - (iv) Charging level by port (DCFC, AC Level 2, etc.)
 - (v) Power delivery rating in kilowatts by port
 - (vi) Accessibility by vehicle with trailer (pull-through stall) by port (yes/no)
 - (vii) Real-time status by port in terms defined by Open Charge Point Interface 2.2.1
- 9. Pricing and payment information:
 - (i) Pricing structure
 - (ii) Real-time price to charge at each charging port, in terms defined by Open Charge Point Interface 2.2.1
 - (iii) Payment methods accepted at charging station.

Products:

- Data submittals to EV-ChART or in manner prescribed by FHWA
- API for third-party data sharing

TASK 10 PROJECT FACT SHEET

The goal of this task is to create 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 includes but is not limited to: a description of the project; the actual benefits resulting from the project; lessons learned from implementing the project; data on potential job creation, economic development, and increased state revenue as a result of expected future expansion; and a comparison of any project performance and expectations provided in the proposal to CEC with actual project performance and accomplishments. 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