Workshop Agenda

• Welcome and Introductions
  - Diversity Survey
  - Empower Innovation
  - Clean Transportation Program

• Solicitation Overview

• Questions & Answers

• Next Steps

• Adjourn
Housekeeping

• Workshop is recorded on Zoom

• Grant Funding Opportunity Webpage:
  https://www.energy.ca.gov/solicitations/2021-10/gfo-21-602-ideal-zev-workforce-pilot

• Virtual Participation via Zoom or telephone during the Q&A period

• Written Questions to Commission Agreement Officer:
  Keyvn Piper, email: Kevyn.Piper@energy.ca.gov, Subject: GFO-21-602
  Q&A Deadline: Friday, October 15, 2021, by 5:00 PM
Commitment to Diversity

The CEC adopted a resolution strengthening its commitment to diversity in our funding programs. The CEC continues to encourage disadvantaged and underrepresented businesses and communities to engage in and benefit from our many programs.

To meet this comment, CEC staff conducts outreach efforts and activities to:

- Engage with disadvantaged and underrepresented groups throughout the state;
- Notify potential new applicants about the CEC’s funding opportunities;
- Assist applicants in understanding how to apply for funding from the CEC’s programs;
- Survey participants to measure progress in diversity outreach efforts.
Diversity Survey

One Minute Survey
The information supplied will be used for public reporting purposes to display anonymous overall attendance of diverse groups.

Zoom Participants, please use the link in the chat to access the survey or scan the QR code on the left of the screen with a phone or tablet to access the survey.

Survey will be closed at the end of the day.

Survey Link: https://forms.office.com/g/Td4SPDZtiU
Empower Innovation strives to accelerate your clean tech journey with easy access to funding opportunities from the CEC and other funding providers, curated resources and events, and connections to people and organizations.

**FIND A PARTNER**
Announce your interest in this funding opportunity and message other interested parties to find potential partners.

**RESOURCES & TOOLS**
Browse the collection of resources for clean tech innovators including Resource Libraries, Funding Sources, Tools, and Databases.

To search for funding opportunities, please go to:
https://www.empowerinnovation.net/en/custom/funding/directory

Please direct questions for the Empower Innovation platform to:
https://www.empowerinnovation.net/en/contact_us
Clean Transportation Program

- Formerly known as the Alternative and Renewable Fuel and Vehicle Technology Program
- Established in 2007 by Assembly Bill 118 (2007)
- Extended to January 1, 2024, by Assembly Bill 8 (2013)
- Provides approximately $95 million of funding per year through 2023
- Investment Plan determines funding allocations across various categories
- Supports workforce training and development
Clean Transportation Program: Workforce Portfolio

Partnerships
- CA Community Colleges
- Employment Training Panel
- Employment Development Department
- Workforce Development Board
- CA Public Schools

Current Projects
- Electric School Bus Training Project
- ZEV College Training Project
- ZEV High School Pilot Project
- Sustainable Freight Workforce Pilot Project
- ZEV Drayage Truck and Infrastructure Pilot
- Transportation Electrification Training Project

Zero Emissions Vehicle High School Pilot Program

$2 Million Total Funding

- 28 High Schools Funded
- 19 High Schools Reporting...
- 1,800 Students/Year Enrolled in Auto Courses with New EV Curriculum
- 36 Faculty (High School and Community College) Trained to Date
Policy Drivers

- 2020-2023 Investment Plan Update for the Clean Transportation Program
- FY 2019-20 Funding Plan for Clean Transportation Incentives
- Senate Bill 350 Low-Income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-Income Residents
- Executive Order N-79-20
- Executive Order B-10-11
- Putting California on the High Road: A Jobs and Climate Action Plan for 2030 Report
- California’s 2020-2023 Unified Strategic Workforce Development Plan

Solicitation Manual pg. #9, “Reference Documents”
Solicitation Overview

IDEAL ZEV Workforce Pilot
Solicitation Process

- Pre-Solicitation Workshop
  - February 2021

- Solicitation Release
  - October 2021

- Notice of Proposed Awards
  - January 2022

- CEC Business Meeting
  - Q1 2022

- Execute Agreement
  - Q1 2022

- Project Start
  - Q2 2022
Purpose of Solicitation

• Competitive grant solicitation

• Seeks projects that will provide workforce training and development that support zero-emission vehicle (ZEVs), ZEV infrastructure, and ZEV-related commercial technologies in California.

• Pathway toward ZEV jobs.
Available Funding

• A total of $6,815,000 is available for awards under this solicitation. The California Air Resources Board is a project partner and is contributing $1,000,000 to this solicitation.

• CEC, at its sole discretion, reserves the right to increase or decrease the amount of funds available under this solicitation.

• Administrative costs are capped at 10%.

• Costs for “supportive services” are capped at a maximum of 5% of the CEC award amount. There is no cap for supportive services provided as a match share expense.
Minimum and Maximum Award Amounts

- The solicitation has two (2) categories for funding:
  - Small Grants: the minimum award amount is $75,000 and the maximum award amount is $250,000
  - Large Grants: the minimum award amount is $250,001 and the maximum award amount is $500,000

- The CEC will recommend awards to the five highest ranked projects (according to final overall application score), and which achieve at least the minimum passing score within each funding category: five projects under Small Grants and five projects under Large Grants.

- With any remaining funding, the CEC will recommend awards to the next overall highest-ranked projects achieving at least the minimum passing score regardless of funding categories, until available funding for this solicitation has been exhausted.

- If an insufficient number of passing projects are received in one of the funding categories, the CEC reserves the right to transfer funding between the funding categories in order to fund additional passing projects received under this solicitation.
Number of Applications

- Applicants are only eligible to submit one (1) application under this solicitation.
- Each proposed project must adhere to all requirements contained in this solicitation.
- Each Applicant must identify a separate and unique federal identification number (FIN).
Eligible Applicants

- California public entities, private entities, community-based organizations (CBO), non-profits (NP), non-governmental organizations (NGOs), California Community Colleges, California State Universities, the University of California, California Native American Tribes, and California Tribal Organizations.

- **Ineligible** applicants include California state agencies, boards, and commissions.

- The Applicant does not need to have its company headquarters in California, but it must have at least one existing physical office within the State of California.

- Applicants must accept the Clean Transportation Program Terms and Conditions, without negotiation.

- Applicants are required to register with the California Secretary of State and be in good standing to enter into an agreement with the CEC.
Project Requirements

• All projects:
  • Must be in California
  • Must focus on plug-in electric and/or hydrogen fuel types only
  • Must provide a minimum of six (6) months of qualitative and quantitative data collection and analysis.

• Must provide training for at least one of these commercially available ZEV technology products:
  • On- and/or off-road vehicles and equipment.
  • Light-, medium-, and/or heavy-duty vehicles.
  • Electric vehicle chargers and their components, systems, and/or parts.
  • Hydrogen fueling stations and their components, systems, and/or parts.
Eligible Projects

Eligible projects include:

• Piloting new and/or expanding existing workforce training and development programs that provide career pathways in ZEV industries and occupations.
• Participant/attendee training.
• Instructor training.
• Developing new ZEV curriculum and/or integrating new ZEV curriculum into existing curriculum, instructional materials, and training activities.
• Leveraging local/regional workforce entities and programs, workforce systems, education partners, and learning centers to increase job recruitment, job retention, and job placement in the ZEV sector.
Eligible Projects (cont.)

- Providing supportive services such as transportation costs and childcare costs for trainees/participants from priority communities to increase access to training opportunities. Supportive services are capped at a maximum of 5% of the CEC award amount. There is no cap for supportive services provided as a match share expense. For a definition of priority communities, please see Section V, “A. Definition of Key Words”

- Training, certification, and/or degree programs in existing ZEV automotive and truck programs.

- Translation services of training resources.
Ineligible Projects

The following are *ineligible*:

- Capital improvements and construction.
- Operations expenses.
- Training for internal combustion engine and related fossil-fuel technologies (i.e., non-ZEV) and hybrid technologies.
- Non-vehicle and/or non-transportation equipment technologies.
- Market studies, literature reviews and surveys, feasibility studies, case studies, proof-of concepts, technology surveys and development, and data-analysis studies.
- Fuel or technology research, development, or deployment.
- Vehicle and equipment tests for compliance and/or certification.
- Software/firmware/hardware technology development.
- Marketing, advertising, and promotional materials.
Match Funding

• There is a 5 percent (5%) match share requirement.
• There is no (0%) match share requirement for California Native American Tribes and California Tribal Organizations.
• Match can be in the form of cash and/or in-kind.
## Application Organization

<table>
<thead>
<tr>
<th>Item</th>
<th>Attachment Number</th>
<th>Action Needed by Applicant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Form</td>
<td>Attachment 1</td>
<td>Complete form</td>
</tr>
<tr>
<td>Project Narrative</td>
<td>Attachment 2</td>
<td>Create referenced document</td>
</tr>
<tr>
<td>Scope of Work Template/Instructions</td>
<td>Attachment 3</td>
<td>Create document from template</td>
</tr>
<tr>
<td>Schedule of Products and Due Dates</td>
<td>Attachment 4</td>
<td>Complete form</td>
</tr>
<tr>
<td>Budget Forms</td>
<td>Attachment 5</td>
<td>Complete form</td>
</tr>
<tr>
<td>Resumes</td>
<td>Attachment 6</td>
<td>Complete referenced document</td>
</tr>
<tr>
<td>Contact List</td>
<td>Attachment 7</td>
<td>Complete form</td>
</tr>
<tr>
<td>Letters of Support/Commitment</td>
<td>Attachment 8</td>
<td>Create referenced document</td>
</tr>
<tr>
<td>CEQA Worksheet</td>
<td>Attachment 9</td>
<td>Complete form</td>
</tr>
<tr>
<td>Localized Health Impacts Information Form</td>
<td>Attachment 10</td>
<td>Complete form</td>
</tr>
<tr>
<td>Conflict of Interest Declaration</td>
<td>Attachment 11</td>
<td>Create referenced document</td>
</tr>
<tr>
<td>Past Performance Reference Form(s)</td>
<td>Attachment 12</td>
<td>Complete form</td>
</tr>
<tr>
<td>Clean Transportation Program Terms and Conditions</td>
<td>Attachment 13</td>
<td>None</td>
</tr>
<tr>
<td>Special Terms and Conditions for California Native American Tribes</td>
<td>Attachment 14</td>
<td>None</td>
</tr>
</tbody>
</table>
Applicants must include a completed full Application Form which describes the project, funds requested, partnerships, applicant eligibility, and other information.

Signature requirement on the application form is waived.
The Application must include a table of contents.

Table of Contents will not count towards page limitations (30-page limit).
Project Narrative

- Limited to 30 pages.
- Project Narrative must include:
  - A detailed description of the approach to complete the proposed project.
  - An explanation of how the project will be implemented through the tasks described in the Scope of Work.
- Respond to each scoring criteria described in Evaluation Criteria (page 37).
Scope of Work (Attachment 3)

- Tell us exactly what you are proposing to do in your project.
- Comprehensive, credible, and logical.
- Identify what will be delivered to the CEC.
- Be sure to include in the technical tasks:
  - At least one product deliverable per task.
Schedule of Products and Due Dates (Attachment 4)

- Product deliverables that correspond with the Scope of Work.
- Realistic dates on when product deliverables can be completed.
- Complete Attachment 4
Budget (Attachment 5)

- Complete all forms in Attachment 5.
- Follow Budget Instructions.
- Identify how CEC funds and match funds will be spent to complete the project.

<table>
<thead>
<tr>
<th>Cost Category</th>
<th>Grant Share</th>
<th>Match Share</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Labor</td>
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<tr>
<td>fringe benefits</td>
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<td>equipmnet</td>
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<tr>
<td>materials/miscellaneous</td>
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</tr>
<tr>
<td>subcontractors</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>total other direct costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>indirect costs</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>profit (not allowed for grant recipients)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>total indirect and profit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>grand total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Solicitation Manual pg. #27
Applicants must include resumes for key personnel identified in the application.

Resumes are generated and labeled as Attachment 6.

Resumes are limited to a maximum of 2 pages each.
Contact List (Attachment 7)

- Applicants must include a completed Contact List (Attachment 7) by including the appropriate points of contact for the Applicant.

- The CEC will complete the CEC points of contact during agreement development.
Letters of Support/Commitment

• Follow guidelines provided for letters of support and/or commitment.
  - Commitment letters are required for entities or individuals that are committing match funding, including the Applicant.
  - Support letters describe a project stakeholder’s interest or involvement in the project.
• Any project partners that will make contributions to the project must submit a commitment letter.
• Limit of two pages per letter.
CEQA Worksheet (Attachment 9)

• Applicants must submit a completed CEQA Worksheet (Attachment 9) to determine CEQA compliance obligations.

• The CEC requires this information to assist it in making its own determination under CEQA.

• Failure to complete the worksheet may lead to disqualification of the proposal.
Applicants must complete and submit a Local Health Impacts Information Form (Attachment 10).

The CEC requires this information to assist in developing and publishing a localized health impacts report.
Past Performance Reference Form (Attachment 12)

- Provide references for:
  - Agreements (e.g., contract, grant, or loan) with the CEC received by the Applicant in the last 10 years.
  - The five most recent agreements with other public agencies received by the Applicant within the past 10 years.
  - References may be contacted by CEC staff.
  - Applicants should fill out a separate Past Performance Reference Form for each reference addressed in the Project Narrative.

Solicitation Manual pp. #30
How Will My Application Be Evaluated?

Stage One: Administrative Screening Criteria (Pass/Fail)

Stage Two: Technical Screening Criteria (Pass/Fail)

Stage Three: Application Evaluation and Scoring

*Applicants must pass BOTH the administrative and technical screening criteria, or the application shall be disqualified and eliminated from further evaluation.
### Administrative Screening Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Pass/Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The application is received by CEC’s Contracts, Grants, and Loans Office by the due date and time specified in the “Key Activities Schedule” in Section I of this solicitation.</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>2. The applicant provides the required authorizations and certifications.</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>3. The applicant has not included a statement that is contrary to the required authorizations and certifications.</td>
<td>Pass or Fail</td>
</tr>
</tbody>
</table>
## Technical Screening Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Pass/Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The Applicant is an eligible applicant.</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>2. The project is an eligible project.</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>3. The applicant meets the minimum match share requirement, if any.</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>4. The applicant does not have a conflict of interest preventing the ability of the applicant to fulfill the duties of the proposed project. Applications that fail this screening criteria may be disqualified and eliminated from further evaluation. The CEC and CARB may consider the nature and extent of any conflict of interest in applying this screening criteria to disqualify an application. Further, the applicant signs the Conflict-of-Interest Declaration document (Attachment 11).</td>
<td>Pass or Fail</td>
</tr>
<tr>
<td>5. The applicant passes the past performance criterion.</td>
<td>Pass or Fail</td>
</tr>
</tbody>
</table>
Past Performance Screening

1. An Applicant may be disqualified due to **severe performance issues** characterized by significant negative outcomes under one or more prior or active CEC agreement(s) within the last 10 years.

2. Any applicant that does not have an active or prior agreement equates to no severe performance issues and therefore would pass this screening criteria.
Application Technical Evaluation and Scoring

• Evaluation Committee applies the scoring scale to the evaluation criteria.

• Applications must obtain a minimum passing score of **70%** or **133 points** in order to be considered for funding.

• Review Section IV of the solicitation manual and ensure the application provides a clear and complete response to each scoring criteria.
### Application Evaluation and Scoring

<table>
<thead>
<tr>
<th>Scoring Criteria</th>
<th>Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Team Experience and Qualifications</td>
<td>30</td>
</tr>
<tr>
<td>2. Community, Partnerships, and Engagement</td>
<td>25</td>
</tr>
<tr>
<td>3. Budget</td>
<td>30</td>
</tr>
<tr>
<td>4. Project Readiness and Implementation</td>
<td>30</td>
</tr>
<tr>
<td>5. Innovation and Future Prospects</td>
<td>25</td>
</tr>
<tr>
<td>6. Benefits</td>
<td>30</td>
</tr>
<tr>
<td>7. Performance Metrics and Data Collection</td>
<td>20</td>
</tr>
</tbody>
</table>

**Total Possible Points**: 190

**Minimum Points to Pass (70%)**: 133
Preferred method of delivery is the CEC’s Grant Solicitation System, available at: https://gss.energy.ca.gov

• First time users must register as a new user to access system.

• Electronic files must be in Microsoft Word (.doc, .docx) and Excel (.xls, .xlsx) formats, unless originally provided in the solicitation in another format.

• Until further notice, any requirement in CEC solicitations to provide a signature is waived (even if it is in the screening criteria). No signature, even electronic is necessary.

• Notice on CEC’s waiver of the signature requirement appears here: https://www.energy.ca.gov/funding-opportunities/solicitations
GFO Submission Requirements

• Due to COVID-19, application hard copies will **NOT** be accepted.
  • In order to be consistent with orders and recommendations from state and local officials to encourage physical distancing to slow the spread of COVID-19, in-person delivery of applications will **NOT** be allowed.

• All applicants must submit their applications through the CEC’s Grant Solicitation System.

• Submit applications early! GSS system will stop accepting application documents promptly at 5pm.

• **NOTE:** Highly recommend that Applicants well in advance of the 5:00 pm deadline as the GSS will automatically lock down and not accept documents after 5:00 pm.
GFO Submission Resources

• How to Apply via the Grant Solicitation System (YouTube): https://youtu.be/571TZWtWGxo

• How to Apply PowerPoint Presentation: https://www.energy.ca.gov/sites/default/files/2019-05/GSS_How_to_Apply.pptx

# Key Dates

<table>
<thead>
<tr>
<th>Activity</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitation Release</td>
<td>Oct. 1, 2021</td>
</tr>
<tr>
<td>Pre-Application Workshop</td>
<td>Oct. 11, 2021</td>
</tr>
<tr>
<td><strong>Deadline for Written Questions by 5:00 p.m.</strong></td>
<td>Oct. 15, 2021</td>
</tr>
<tr>
<td>Anticipated Distribution of Question/Answers</td>
<td>Oct. 29, 2021</td>
</tr>
<tr>
<td><strong>Deadline to Submit Applications by 5:00 p.m.</strong></td>
<td>Dec. 2, 2021</td>
</tr>
<tr>
<td>Anticipated Notice of Proposed Awards Posting</td>
<td>Jan. 2022</td>
</tr>
<tr>
<td>Anticipated Energy Commission Business Meeting</td>
<td>1st Quarter 2022</td>
</tr>
</tbody>
</table>
Question and Answers

Three ways to ask questions:
Please state your name and affiliation. Keep questions under 3 minutes to allow time for others.

1. **Use the raise hand function in Zoom**
   Zoom Phone Controls:
   - *6 – Toggle mute/unmute
   - *9 – Raise hand

2. **Type questions in the Zoom Q&A Box**

3. **Submit written questions**
   Send written questions to Kevyn.Piper@energy.ca.gov
   Deadline: October 15, 2021, 5:00 p.m. PST

Note that an official CEC response will be provided in writing and posted on the GFO webpage in approximately two weeks.
Written Questions

Please send all questions related to GFO-21-602 to:

Kevyn Piper
Commission Agreement Officer
1516 Ninth Street, MS-18
Sacramento, CA 95814
(916) 827-9241
Kevyn.Piper@energy.ca.gov
(Please add subject line: GFO-21-602)

Deadline to submit questions: **Friday, October 15, 2021, 5:00 p.m. PST**

Deadline to submit applications: **Thursday, December 2, 2021, 5:00 p.m. PST**
# Next Steps

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<tr>
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Updates to solicitation documents will be posted on the GFO Webpage: https://www.energy.ca.gov/solicitations/2021-10/gfo-21-602-ideal-zev-workforce-pilot
Thank You!

Applications are due December 2, 2021, by 5:00 pm.