



GFO-22-610 Pre-Application Workshop

Convenient, High-Visibility, Low-Cost Level 2 Charging (CHILL-2)

Fuels and Transportation Division
April 17, 2023 | 10:00 am



Workshop Agenda

- Welcome and Introductions
 - Diversity Survey
 - Empower Innovation
 - Clean Transportation Program
- Solicitation Overview
 - Process
 - Purpose
 - Eligibility and Requirements
- Application Components
- Application Evaluation
- Application Submittal
- Questions & Answers
- Next Steps
- Adjourn





Housekeeping

- Workshop is recorded on Zoom
- [Grant Funding Opportunity Webpage:](https://www.energy.ca.gov/solicitations/2023-03/gfo-22-610-convenient-high-visibility-low-cost-level-2-charging-chill-2)
<https://www.energy.ca.gov/solicitations/2023-03/gfo-22-610-convenient-high-visibility-low-cost-level-2-charging-chill-2>
- Virtual Participation via Zoom or telephone during the Q&A period
- Written Questions to Commission Agreement Officer:
Eilene Cary, email: eilene.cary@energy.ca.gov
Subject: GFO-22-610
Q&A Deadline: **Friday, April 28, 2023, 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



Scan the code on a phone or tablet with a QR reader to access the 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/EfbTHwaRYx>



Find Partners on EmpowerInnovation.net

Empower Innovation aims to accelerate your clean tech journey with easy access to funding opportunities from the Energy Commission and others, resources and events, and connections to people and organizations.

www.empowerinnovation.net

FIND A PARTNER

Announce your interest in funding opportunities and message potential project partners directly.

RESOURCES & TOOLS

Browse the collection of resources including Resource Libraries, Funding Sources, Tools, and Databases.



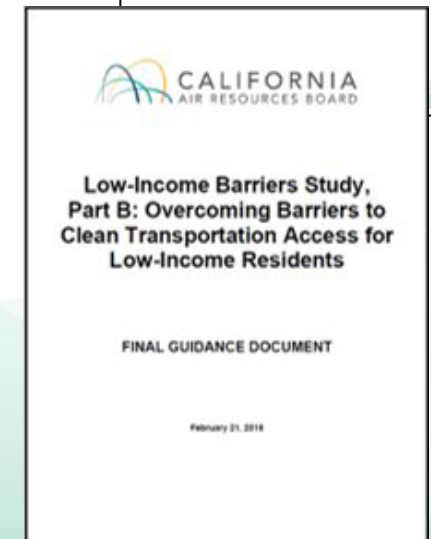
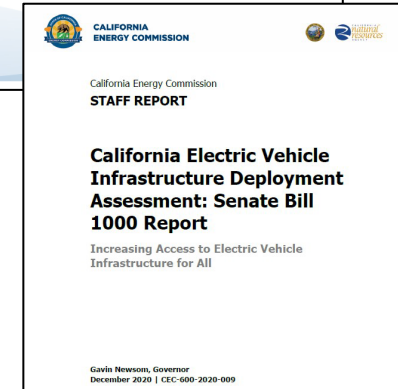
Clean Transportation Program

- 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



Policy Drivers

- 2022-2023 Investment Plan Update for the Clean Transportation Program
- Assembly Bill 2127 Electric Vehicle Charging Infrastructure Assessment – Analyzing Charging Needs to Support Zero-Emission Vehicles in 2030
- California Electric Vehicle Infrastructure Deployment Assessment: Senate Bill 1000 Report
- Senate Bill 350 Low-Income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-Income Residents
- Executive Order N-79-20





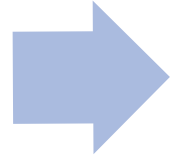
Solicitation Overview

Convenient, High-Visibility, Low-Cost Level 2 Charging
(CHiLL-2)

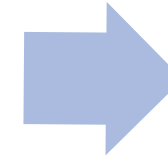


Solicitation Process

Pre-Solicitation Workshop
Sep 2022

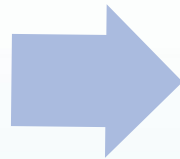


Solicitation Release
March 23, 2023

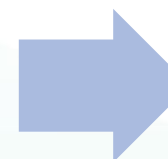


Applications Due
June 16, 2023

Notice of Proposed Awards
August 2023



CEC Business Meeting
Q4 2023



Project Start
Q4 2023



Purpose of Solicitation

- Competitive grant solicitation
- Demonstrate replicable and scalable business and technology models to deploy Level 2 electric vehicle (EV) chargers
- Improve public awareness of and confidence in Level 2 charging access through **high-density, high-visibility** installations
- Provide Level 2 charging access in disadvantaged and/or low-income communities
- Provide reliable and readily accessible chargers



Available Funding and Minimum/Maximum Award Amounts

- A total of \$24 million is available under this solicitation

Award Category	Minimum Award Amount	Maximum Award Amount
Larger Cities	\$2 million	\$10 million*
Smaller Cities and Tribal Lands	\$300,000	\$4 million*

*Or 75% of the total project costs, whichever is less



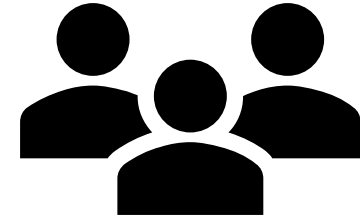
Applications and Awards

- Applicants may submit one application per Award Category
- The CEC will screen and score applications
- The projects with the highest ranking and at least the minimum passing score in each Award Category will be recommended for funding in order of application score
- After one application from each Award Category has been recommended for funding, if remaining solicitation funds are available, additional applications obtaining at least the minimum passing score will be recommended in ranked order



Eligible Applicants

- All public and private entities
- Local government agencies highly encouraged
- 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
- CA Native American Tribes must be federally recognized

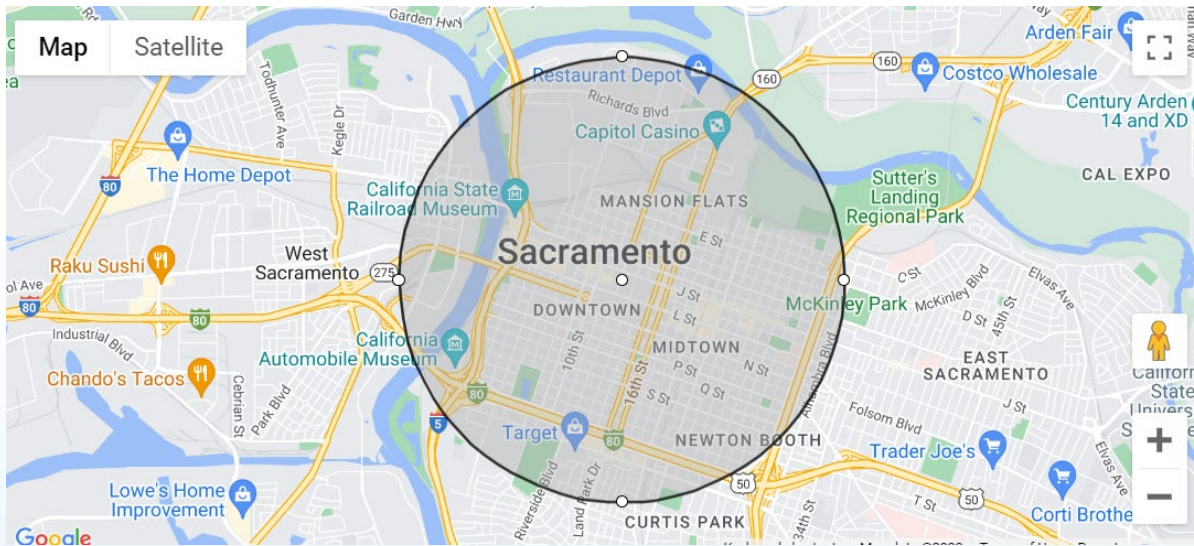




Project Requirements

All projects must:

- Install a minimum number of chargers based on Award Category within a **1.5-mile radius** of project area central point



source: <https://www.mapdevelopers.com/draw-circle-tool.php>

- Projects located in **Larger Cities** must install a minimum of 300 chargers
- Projects located in **Smaller Cities** must install a minimum of 15 chargers per every 10,000 people

Ex: Vallejo has 125,350 people, so projects here would require a minimum of 180 chargers ($12 \times 15 = 180$)

Ex: minimum population of 50,000 has a minimum of 75 chargers ($5 \times 15 = 75$)

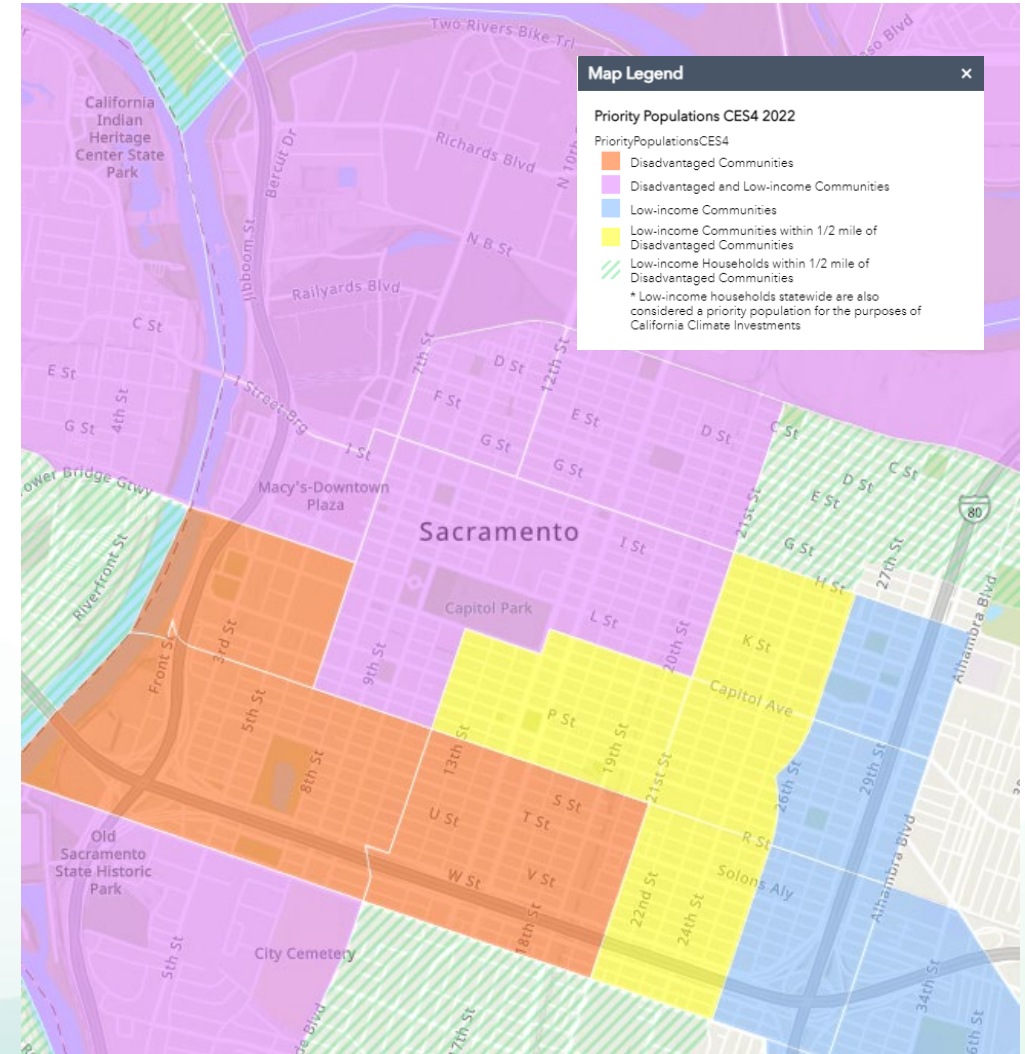
- Projects located on **Tribal Lands** must install a minimum of 50 chargers



Eligible Projects

Eligible projects must:

- Install at least 50% of chargers in disadvantaged and/or low-income communities
- Ensure a minimum of 5 chargers per site
- Ensure chargers are publicly available at least 18 hours per day
- Ensure locations are well-lit and safe
- Offer multiple point-of-sale methods
- Installations must occur at existing structures/facilities





Eligible Projects, Cont.

Projects must:

- Install chargers capable of outputting at least 6.2 kW of power
- Ensure all chargers are networked, support the SAE J1772 standard and OCPP v1.6 or later
- Ensure all chargers are ISO 15118 ready
- Use EVITP-certified technicians
- Include an Operations & Maintenance Plan
 - 97% uptime
 - Chargers installed must be operational for a minimum of 6 years
 - Provide customer support and dispatching services within 10 days



Project Costs

Eligible project costs include:

- Electric vehicle supply equipment (EVSE)
- Applicant's cost-share of utility installation:
 - Transformers, electric panels, conduit, wiring, meters
- Renewable distributed energy resources or energy storage equipment/systems capable of providing independent or supplemental power to the EV chargers (separately metered)
- Installation costs
- Planning and engineering design costs
- Stub-outs
- Demand management equipment
- Engagement and outreach to property owners, residents and potential users (no more than 10% of total project costs)
- Equipment warranties during the term of the agreement
- Maintenance
- Lighting and signage

Ineligible project costs include:

- Level 1 and DCFC charging equipment
- Vehicle purchases
- Standard outlets (110/120 volt or 208/240 volt)
- Nonrenewable distributed energy resources
- Distribution grid or other equipment costs that are otherwise covered by programs or tariff rules of the electric utilities
- Utility service upgrade costs covered by the utility
- Processes to comply with otherwise applicable legal requirements
- Paper studies or research projects
- Vehicle demonstrations or demonstrations of existing technologies
- Forgone profit



Match Funding

- Applicants must include a minimum of **25% match share**
 - 25% of total project costs (i.e. CEC share + Match share)
 - 50% of total match must be cash

Example for a Larger City:

- If the project costs \$10 million, at least \$2.5 million must be match (CEC share would be \$7.5 million)
- Of that \$2.5 million match share, at least \$1.25 million must be cash match

Example for a Smaller City:

- If the project costs \$2 million, at least \$500,000 must be match (CEC share would be \$1.5 million)
- Of that \$500,000 match share, at least \$250,000 must be cash match



Application Components

Convenient, High-Visibility, Low-Cost Level 2 Charging
(CHiLL-2)



Application Organization (p. 23)

Item	Action Needed by Applicant
Application Form (Attachment 1)	Complete the attachment
Project Narrative	Create document
Scope of Work (Attachment 2)	Complete the attachment
Schedule of Products and Due Dates (Attachment 4)	Complete the attachment
Proposal Budget (Attachment 5)	Complete the attachment
Resumes	Create document(s)
Contact List (Attachment 6)	Complete the attachment
Letters of Support/Commitment	Create document(s)
CEQA Worksheet (Attachment 7)	Complete the attachment
Localized Health Impacts Information Form (Attachment 8)	Complete the attachment
Past Performance Reference Form(s) (Attachment 10)	Complete the attachment(s)
Operations and Maintenance Plan	Create document
<i>Scope of Work Instructions (Attachment 3)</i>	<i>None</i>
<i>Clean Transportation Program Terms and Conditions (Attachment 9)</i>	<i>None</i>
<i>Special Terms and Conditions for Native American Tribes (Attachment 11)</i>	<i>None</i>



Application Form (Attachment 1)

- Applicants must complete Attachment 1
- Signature requirement on the application form is waived
- Include image of project radius

**ATTACHMENT 01
GFO APPLICATION FORM**

Image of project area showing radius

Ex:

Source: <https://www.mapdevelopers.com/draw-circle-tool.php>

**ATTACHMENT 01
GFO APPLICATION FORM**

This document provides the California Energy Commission (CEC) with basic information about the Applicant and Proposed Project. Each Applicant must complete and include this Application Form in its application.

Applicant's Legal Name		Federal ID Number
[Redacted]		[Redacted]
Title of Proposed Project		
[Redacted]		
Proposed Term		
Start Date		End Date
[Redacted] / [Redacted] / [Redacted]		[Redacted] / [Redacted] / [Redacted]
Proposed Project Funding		
Amount of Funds Requested		\$ [Redacted]
Total Match Funding		\$ [Redacted]
Cash Match \$ [Redacted]		
In-kind Match \$ [Redacted]		
Total Project Cost (sum of two previous rows)		\$ [Redacted]
Match Funding Percentage (Total Match Funding/Total Project Cost)		[Redacted] %
Proposed Project Location		
Project city	[Redacted]	
Project area central point (does not necessarily need to be a site identified for installation). Please indicate cross streets. Ex: Cesar Chavez Plaza on J & 10th in Downtown Sacramento	[Redacted]	
Project radius (miles)	[Redacted] miles	

Application Form Attachment 01 Page 1 of 5 GFO-22-610 CHILL-2



Project Narrative

- **Applicants must submit a project narrative**
- Limited to 25 pages
- Use 11-point font, single-spaced and a blank line between paragraphs
- Include page numbers
- **Project Narrative must address each scoring criterion (pp. 25-27) which directly correlate to the Evaluation Criterion (pp. 39-41)**

b. **Project Benefits**

- 1) Describe how the project will demonstrate replicable and scalable business and technology models to deploy Level 2 EV charging stations. Describe the business and technology models to be tested, including any innovative features. Describe evaluation of the success of the business and technology models, including the criteria that will be used, data to be collected, and data collection and analysis methods.
- 2) Describe how costs to users will be minimized.

E. EVALUATION CRITERIA

Criterion	Possible Points
1. Project Benefits Applications will be evaluated on the degree to which: <ul style="list-style-type: none"> • The project demonstrates replicable and scalable business and technology models to deploy Level 2 charging stations. • The business and technology models are feasible and innovative. • The evaluation of business and technology models will effectively measure the success of those models. The criteria, data, and methods support effective evaluation. • Costs to users will be minimized. 	25



Table of Contents

- The Project Narrative must include a Table of Contents
- Table of Contents will not count towards the 25-page limit

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Scope of Work (Attachment 2)

- Applicants must complete Attachment 2
- Describe exactly what the project will do
- Identify what will be delivered to the CEC
- Be sure to include in the technical tasks:
 - At least one product deliverable per task

**Attachment 2
Exhibit A
SCOPE OF WORK**

TECHNICAL TASK LIST
<Insert the Task numbers and Task names for your Agreement. Applicants may leave the CPR column blank.>

Task #	CPR	Task Name
1		Administration
2		<Insert Task Name>
3		<Insert Task Name>
<Etc.>		<Insert Task Name>
<Etc.>		<Insert Task Name>
<Third to Last Task>		Operations and Reliability
<Second to Last Task>		Data Collection and Analysis
<Last Task>		Project Fact Sheet

KEY NAME LIST
<Insert the Task numbers and the Key names for each Task in your Project. Include Key names only if the value of the project would significantly change without those personnel, subcontractors, or partners. Add additional lines as needed. Alternatively, you may delete this table if there are no key names.>

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	<Name>	<Name>	<Name>
2	<Name>	<Name>	<Name>
3	<Name>	<Name>	<Name>
<Etc.>	<Name>	<Name>	<Name>

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

Term/ Acronym	Definition
CAM	Commission Agreement Manager

<DATE>

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Attachment 2 - Scope of Work

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Schedule of Products and Due Dates (Attachment 4)

- Applicants must complete Attachment 4
- Add tasks and product deliverables that correspond to the Scope of Work
- Provide realistic dates for when product deliverables can be completed

Attachment 04
Exhibit A-1
Schedule of Products and Due Dates

Task Num	Task Name	Product(s)	Due Date
1.1	Attend Kick-off Meeting		
		Updated Schedule of Products	<Insert Date>
		Updated List of Match Funds	<Insert Date>
		Updated List of Permits	<Insert Date>
		Written Statement of Match Share Activities	<Insert Date>
		Kick-Off Meeting Agenda (CEC)	<Insert Date>
1.2	Critical Project Review Meetings		
		CPR Report	<Insert Date>
	1st CPR Meeting	CPR Meeting Agenda (CEC)	<Insert Date>
		Schedule for written determination (CEC)	<Insert Date>
		Written determination (CEC)	<Insert Date>
	<Add as many CPRs as required>	<Utilize same products as 1st CPR Meeting>	<Insert Date>
		<Utilize same products as 1st CPR Meeting>	<Insert Date>
1.3	Final Meeting		
		Written documentation of meeting agreements	<Insert Date>
		Schedule for completing closeout activities	<Insert Date>
1.4	Monthly Calls		
		Email to CAM concurring with call summary notes	Within 5 days of receipt
1.5	Quarterly Progress Reports		
		Quarterly Progress Reports	10th calendar day of each January, April, July, and October during the approved term of this Agreement
1.6	Final Report		
		Final Outline of the Final Report	<Insert Date>
		Draft Final Report	<Insert Date>
		Final Report (no less than 60 days before the end term of the agreement)	<Insert Date>
1.7	Identify and Obtain Match Funds		
		A letter regarding match funds or stating that no match funds are provided	<Insert Date>
		Copy(ies) of each match fund commitment letter(s) (if applicable)	<Insert Date>
		Letter(s) for new match funds (if applicable)	Within 10 days of identifying new match funds

Attachment 04 1 of 4 GFD-22-610



Proposal Budget (Attachment 5)

- Applicants must complete Attachment 5
- Follow Budget Instructions
- Identify how CEC funds and match funds will be spent to complete the project
- For more information on updates to the CEC budget forms, visit the [CEC ECAMS Resources](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) webpage at <https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources>

Template Version 2/17/2023

PROPOSAL BUDGET			
Category Budget			
Grant Funding Number	GFO-XX-XXX		
Name of Organization	Organization name here		
Select Recipient or Subrecipient			
Select your organization's California Business Certifications			
Cost Category	CEC Share	Match Share	Total
Direct Labor	\$ -	\$ -	\$ -
Fringe Benefits	\$ -	\$ -	\$ -
Total Labor	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ -
Materials/Miscellaneous	\$ -	\$ -	\$ -
Subrecipients/Vendors	\$ -	\$ -	\$ -
Total Other Direct Costs	\$ -	\$ -	\$ -
Indirect Costs	\$ -	\$ -	\$ -
Profit (not allowed for grant recipients)	\$ -	\$ -	\$ -
Total Indirect and Profit	\$ -	\$ -	\$ -
Grand Totals	\$ -	\$ -	\$ -
<i>Total CEC Reimbursable Funds Spent in California or Paid to California-Based Entities (if applicable)</i>	\$ -		
<i>Percentage of CEC Reimbursable Funds Spent in California or Paid to California-Based Entities</i>			



Resumes

- Applicants must include resumes for key personnel identified in the application
- Resumes are limited to a maximum of 2 pages each

FIRST LASTNAME

Construction Worker
Seattle, WA
firstlast@email.com
555-555-5555

Effective at using forklift's, hand trucks and pallet jacks to move merchandise. Skilled at inspecting stock, tagging product and updating computer tracking systems. Well-versed in warehouse operations, inventory audits and loading and unloading procedures.

Eligible to work for any employer in the U.S.

WORK EXPERIENCE

Construction Worker

NewCompany January 2018 to Present

Unpacked and assembled all new merchandise using variety of power tools and lean manufacturing. Heavy Lifting. Measuring. Organize Building Materials. Read and Interpret Drawings. Safety. Supported technicians in equipment maintenance and repair. Organized Warehouse Operations.

Crew Lead

CompanyCo, Inc July 2017 to December 2017

Trained employees so that they were well-educated in time management and the proper ways to complete their job duties. Utilized all machinery and equipment while observing various safety precautions and practices. Ensured that job tasks were completed to standards and in accordance with company guidelines. Maintained the job site on a daily basis and checked to see that all trash and refuse was removed. Completed daily forklift safety checklists. Located proper slots on storage racks and set pallets in place with forklift and pallet jack.

EDUCATION

High school or equivalent

Ged Program - NewCity, NC
April 2015 to February 2016



Contact List (Attachment 6)

- Applicants must complete Attachment 6
- Include the appropriate points of contact under the Recipient column
- The CEC will complete the CEC points of contact during agreement development

**Attachment 06
CONTACT LIST**

Please complete the information in the "Recipient" column.

California Energy Commission	Recipient
<p>Commission Agreement Manager: (TBD by Commission) California Energy Commission 715 P Street, MS-6 Sacramento, CA 95814 Phone: (916) XXX-XXXX e-mail:</p>	<p>Project Manager: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:</p>
<p>Confidential Deliverables/Products: California Energy Commission Contracts, Grants, and Loans Officer 715 P Street Sacramento, CA 95814 Phone: (916) 767-4991</p>	<p>Administrator: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:</p>
<p>Invoices, Progress Reports and Non-Confidential Deliverables to: California Energy Commission Accounting Officer 715 P Street Sacramento, CA 95814 e-mail: invoices@energy.ca.gov</p>	<p>Accounting Officer: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:</p>
<p>Legal Notices: Tatyana Yakshina Grants Manager California Energy Commission 715 P Street, MS-18 Sacramento, CA 95814 Phone: (916) 827-9294 e-mail: tatyana.yakshina@energy.ca.gov</p>	<p>Recipient Legal Notices: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:</p>

Attachment 06
Page 1 of 1
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Letters of Support/Commitment

- Applicants must include appropriate Letters of Commitment from:
 - Entities or individuals that are committing match funding (if applicable)
 - Key project partners that will make contributions to the project (if applicable)
- Applicants may include Letters of Support
- Limit of two pages per letter



CEQA Form (Attachment 7)

- Applicants must complete Attachment 7
- The CEC requires this information to assist in making its own CEQA determination
- Ensure CEQA information is provided in a timely manner to avoid cancellation of proposed award
- All deployments must be at existing structures or facilities and involve negligible or no expansion of former use

ATTACHMENT 7

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) WORKSHEET

The California Environmental Quality Act (CEQA) (Public Resources Code §§ 21000 et seq.) requires public agencies to identify the significant environmental impacts of their actions and to avoid or mitigate them, if feasible.¹ Under CEQA, an activity that may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment is called a "project." (Public Resources Code § 21065.) Approval of a contract, grant, or loan may be a "project" under CEQA if the activity being funded may cause a direct physical change or a reasonably foreseeable indirect physical change in the environment. Agencies must comply with CEQA before they approve a "project." This can include preparing a Notice of Exemption or conducting an Initial Study and preparing a Negative Declaration, a Mitigated Negative Declaration, or, if there are significant impacts, an Environmental Impact Report.

The Lead Agency is the public agency that has the greatest responsibility for preparing environmental documents under CEQA, and for carrying out, supervising, or approving a project. Where the award recipient is a public agency, the Lead Agency is typically the recipient. Where the award recipient is a private entity, the Lead Agency is the public agency that has greatest responsibility for supervising or approving the project as a whole.² When issuing contracts, grants or loans, the Energy Commission is typically a "Responsible Agency" under CEQA, which means that it must make its own CEQA findings based on review of the Lead Agency's environmental documents. If the Energy Commission is the only public agency with responsibility for approving the project, then the Energy Commission must act as the Lead Agency and prepare its own environmental documents before approving the project.

This worksheet will help the Energy Commission determine what kind of CEQA review, if any, is necessary before it can approve the award, and which agency will be performing that review as a Lead Agency. Please answer all questions as completely as possible. It may also help you to think through the CEQA process necessary for your proposed project. The Energy Commission may request additional information in order to clarify responses provided on this worksheet.

¹ For a brief summary of the CEQA process, please visit <http://ceres.ca.gov/ceqa/summary.html>.

² 14 C.C.R. §§ 15050, 15051. The Lead Agency typically has general governmental powers (such as a city or county), rather than a single or limited purpose (such as an air pollution control district).



Local Health Impacts Information Form (Attachment 8)

- Applicants must complete Attachment 8
- The CEC requires this information for a Localized Health Impacts report

Attachment 8

Local Health Impacts Information

Air Quality Guidelines (California Code of Regulations, Title 13, Chapter 8.1, Section 2343(c)(6)(A)) require the Energy Commission to analyze the aggregate locations of the funded projects, analyze the impacts in communities with the most significant exposure to air contaminants or localized air contaminants, or both, including, but not limited to, communities of minority populations or low-income populations, and identify agency outreach to community groups and other affected stakeholders.

This information must be provided for all AB 118 funding categories, including fueling stations, fuel production, feedstock production or procurement, and vehicle or technology component production.

INSTRUCTIONS

Please complete the following information for all sites where work for the proposed project that will require a permit will be done. Attach additional pages if necessary. If the project includes multiple sites, you may submit this information in a table format using the bolded font below as column headers.

PROJECT NAME

APPLICANT'S NAME AND ORGANIZATION

PROJECT SITE(S) DESCRIPTION

Provide the precise street address(es) of the site(s) and a description of existing infrastructure or facilities (if any), surrounding structures, reference to any regional plans or zoning requirements for each location, and its proximity to residences, day care facilities, elder care facilities, medical facilities, and schools.

(E.g., Site 1: 123 Main Street, Grand Terrace, CA, 92313, Vacant lot in a commercially-zoned area. Commercial buildings surround the lot. No residences, daycare facilities, elder care facilities, medical facilities or schools within ¼ mile; Site 2: 321 Beach Street, San Francisco, CA, Existing gasoline/diesel fueling station. Residential area within 200 on South and East ends of project site.)

DEMOGRAPHIC DATA

Provide demographic data at the city or Zip code level for either the project location or the location of the potential health impacts, including:

- Total population
- Median education level
- Unemployment rate
- Percentage of minorities (by ethnicity)



Past Performance Reference Form (Attachment 10)

- Applicants must complete Attachment 10 to provide references for:
 - Agreements 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 must include a contact person name and phone number or email address. These persons may be contacted by CEC staff
- Applicants should fill out a separate Past Performance Reference Form for each agreement reference
- If no previous agreements, no form necessary

Attachment 10
GFO-22-610
PAST PERFORMANCE REFERENCE FORM

Provide references for CEC agreements (e.g., contracts, grants, or loans) received by the Applicant in the last 10 years, including ongoing agreements, and the 5 most recent agreements with other public agencies within the last 10 years to verify Applicant's past performance. Each reference must include a contact person name and phone number (or email address). If contacted by California Energy Commission staff, references should be able to speak to Applicant's ability to successfully complete projects in a timely manner.

In response to Section III.D.2.e, Team Qualifications, if the team's experience and qualifications includes a specific project(s) under current or prior agreements with public funding (e.g., contract, grant, or loan), the Applicant must also submit a Past Performance Reference Form(s) for the project(s), even if the team member is not the primary Applicant.

Applicants should fill out a separate Past Performance Reference Form for each reference.

Name of Organization	
Address	
Contact Name	
Contact Title	
Contact Phone Number (or Email)	
Title of Project	
Agreement Number or Other Unique Identifier	
(For projects that did not complete (or timely complete) project objectives) Describe the challenges faced, what led to those challenges and indicate whether those challenges were within the Applicant's control.	
Describe any severe audit findings and how they were ultimately addressed and resolved.	

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Operation and Maintenance Plan

- Applicants must submit an Operation and Maintenance Plan
- Plans should address:
 - Preventative and corrective maintenance
 - Recordkeeping and reporting
- Elements to include:
 - Plans to maximize uptime
 - Remote monitoring and diagnostics
 - Customer service (including reporting non-operation)
- AB 2061
 - Chargers installed after Jan 1, 2024 must comply with recordkeeping and reporting standards





Application Evaluation

Convenient, High-Visibility, Low-Cost Level 2 Charging
(CHiLL-2)



How Will My Application Be Evaluated?

Stage One: Application Screening

- Administrative Screening Criteria (Pass/Fail)
- Technical Screening Criteria (Pass/Fail)

Stage Two: Application Evaluation

*Applicants must pass ALL screening criteria, or the application shall be disqualified and eliminated from further evaluation.



Administrative Screening Criteria

Criteria	Pass/Fail
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.	Pass or Fail
2. The applicant provides the required authorizations and certifications.	Pass or Fail
3. The applicant has not included a statement that is contrary to the required authorizations and certifications.	Pass or Fail



Technical Screening Criteria

Criteria	Pass/Fail
1. The applicant is an eligible applicant.	Pass or Fail
2. The project is an eligible project.	Pass or Fail
3. The applicant meets the minimum match share requirement, if any.	Pass or Fail
4. The applicant passes the past performance criterion.	Pass or Fail
5. The application is complete.	Pass or Fail



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

- The Evaluation Committee applies the scoring scale to the evaluation criteria
- Applications must obtain a minimum passing score of **70%** or **84 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 all scoring criteria



Application Evaluation and Scoring

Scoring Criteria	Possible Points
1. Project Benefits	25
2. Project Location	15
3. Project Readiness	20
4. Team Qualifications	15
5. Project Budget	10
6. Innovation and Sustainability	20
7. Operation and Maintenance Plan	15
Total Possible Points	120
Bonus Points Available	8
Minimum Points to Pass (70%)	84



Project Benefits (25 pts)

Applications will be evaluated on the degree to which:

- The project demonstrates replicable and scalable business and technology models to deploy Level 2 charging stations.
- The business and technology models are feasible and innovative.
- The evaluation of business and technology models will effectively measure the success of those models. The criteria, data, and methods support effective evaluation.
- Costs to users will be minimized.
- The project is likely to continue and provide benefits beyond the six-year period required by this solicitation.
- The project improves public awareness of and confidence in Level 2 charging access through high-density, high-visibility installations.



Project Benefits Continued (25 pts)

Applications will be evaluated on the degree to which:

- The evaluation of public awareness and confidence will effectively measure those variables. The criteria, data, and methods support effective evaluation.
- Level 2 charging access in disadvantaged and/or low-income communities is maximized.
- Benefits for disadvantaged and low-income communities are maximized and evaluation of benefits is effective.
- Visibility and driver awareness of Level 2 charging is enhanced through signage, mobile or website indicators, or other methods.
- User and vehicle safety is maximized.
- Charging equipment features deter or prevent vandalism and minimize downtime.
- Greenhouse gas emissions reductions and benefit-cost score are maximized.



Project Location (15 pts)

Applications will be evaluated on the degree to which:

- The characteristics of the project city or targeted area enhances utilization of the installed Level 2 chargers.
- Proposed Level 2 charger installations support a variety of user types (i.e. residents, employees, consumers, etc.).
- Past and/or proposed outreach supports the goals of this solicitation and is effective.
- The proposed installations will support charging by residents of multi-family housing.
- The targeted area for installations is capable of supporting the infrastructure for the proposed number of chargers.



Project Readiness (20 pts)

Applications will be evaluated on the degree to which:

- Specific sites have been identified and secured.
- The process for securing additional sites will be expedited.
- The timeline for obtaining chargers and other equipment is minimized.
- The timeline for installing chargers and beginning operation is minimized.
- Progress towards CEQA compliance is demonstrated and timelines for completion are minimized.
- Challenges or barriers to installations are identified and addressed.



Team Qualifications (15 pts)

Applications will be evaluated on the degree to which:

- The project team is well qualified for the tasks described in the proposed scope of work.
- The project team includes or has identified engagement with a local government agency that will benefit project progress.
- The project team has experience with large numbers of Level 2 charger installations.
- The project team has the ability to meet deadlines and complete milestones with large, complex projects.
- Collaborations with local planning agencies, community-based organizations, utilities, site hosts, multi-family housing residents, or other stakeholders will lead to project success.



Project Budget (10 pts)

Applications will be evaluated on the degree to which:

- The project budget is justifiable and reasonable relative to the project.
- CEC funds are needed.
- Costs, including cost per charger for installation and operation, are minimized.
- Match funding sources and commitments are sound and will lead to project success.



Innovation and Sustainability (20 pts)

Applications will be evaluated on the degree to which:

- Innovative or advanced charger technology is utilized to enhance user charging experience and maximize access and utilization.
- Grid impacts are minimized.



Operation and Maintenance Plan (15 pts)

Applications will be evaluated on the degree to which:

- The project will maximize uptime.
- Operation and maintenance, as described in the Operation and Maintenance Plan, exceeds the solicitation's minimum standards.
- The Operation and Maintenance Plan demonstrates availability of qualified technicians and replacement parts. Remote monitoring, diagnostics, updates, and repairs will effectively measure and reduce downtime.
- The Applicant effectively addresses interoperability of chargers and vehicles.
- Customer service and site host training support awareness of and prompt attention to chargers that are not operational.



Bonus Points

- Bonus points will be awarded to projects that install additional Level 2 chargers beyond the minimum requirement based on the following formula:
 - **+1 point added to the overall score for each additional 25 chargers beyond the minimum requirement**
- Example for a Larger City: applicants proposing to install 350 chargers will receive +2 bonus points (min charger count = 300; 50 additional chargers = 2 bonus points)
- Example for a Smaller City (population 150,000): applicants proposing to install 300 chargers will receive +3 bonus points (min charger count = 225; 75 additional chargers = 3 bonus points)



Special Note on Terms and Conditions

Convenient, High-Visibility, Low-Cost Level 2 Charging
(CHiLL-2)



Terms and Conditions

- Attachment 9 includes the Clean Transportation Program Terms and Conditions
 - Appendix 1 reflects the terms and conditions that have been updated through our ECAMS process
 - E.g. backup documentation required for invoicing
- More information is on the [ECAMS Resources webpage](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) at <https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources>
- Special Terms and Conditions for CA Native American Tribes and Tribal Organizations with Sovereign Immunity (Attachment 11)



Application Submittal

Convenient, High-Visibility, Low-Cost Level 2 Charging
(CHiLL-2)



GFO Submission Requirements (Electronic)

The method of delivery is the CEC's Grant Solicitation System (GSS), available at: <https://gss.energy.ca.gov>

- First time users must register as a new user
- Electronic files must be in Microsoft Word and Excel formats, unless originally provided in the solicitation in another format
- Until further notice, any requirement in CEC solicitations to provide a signature is waived. In the GSS, checking the "I Agree" box and clicking the "I Agree & Submit" button provides the required authorizations and certifications
 - Notice on CEC's waiver of the signature requirement appears here: <https://www.energy.ca.gov/funding-opportunities/solicitations>



GFO Submission

Submit applications early!

The GSS system will stop accepting application documents promptly at the deadline of 11:59 p.m. on **June 16, 2023**

Applications in the process of being submitted prior to the deadline will **NOT** be accepted after the deadline



GFO Submission Resources

- How to Apply via the Grant Solicitation System:
<https://www.energy.ca.gov/media/1654>
- This presentation explains how to:
 - Create an account
 - Create a new application
 - Select the correct solicitation
 - Upload application files
 - Edit application
 - Review and submit
- Tips and Frequently Asked Questions

A screenshot of the California Energy Commission's Grants Solicitation System login page. The page features a navigation bar with the CA.GOV logo, the California Energy Commission logo, and a menu with links: Home, About Us, Analysis & Stats, Efficiency, Funding, Power Plants, Renewables, Research, and Transportation. The main heading is "Grants Solicitation System". Below this is a "Log In" form with fields for "Email" (containing "Your Email Address") and "Password" (containing "Your Password"). There is a "Sign In" button and a link for "Forgot your password?". Below the form, there is a link for "Don't have an account?" and a "Register as a New User" button.



Key Dates

Activity	Action Date
Solicitation Release	March 23, 2023
Pre-Application Workshop	April 17, 2023
Deadline for Written Questions by 5:00 p.m.	April 28, 2023
Anticipated Distribution of Question/Answers	Week of May 8, 2023
Deadline to Submit Applications by 11:59 p.m.	June 16, 2023
Anticipated Notice of Proposed Awards Posting	Week of August 7, 2023
Anticipated Energy Commission Business Meeting	November 2023



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 eilene.cary@energy.ca.gov

Deadline: April 28, 2023, 5:00 p.m. PST

Note that an official CEC response will be provided in writing and posted on the GFO webpage in early May.



Written Questions

Please send all questions related to GFO-22-610 to:

Eilene Cary

Commission Agreement Officer

715 P Street, MS-1

Sacramento, CA 95814

(916) 776-0739

Eilene.cary@energy.ca.gov

(Please add subject line: GFO-22-610)

Deadline to submit questions: Friday, April 28, 2023, 5:00 p.m. PST

Deadline to submit applications: Friday June 16, 2023, 11:59 p.m. PST



Next Steps

Activity	Action Date
Deadline for Written Questions by 5:00 p.m.	April 28, 2023
Anticipated Distribution of Question/Answers	Week of May 8, 2023
Deadline to Submit Applications by 11:59 p.m.	June 16, 2023
Anticipated Notice of Proposed Awards Posting	Week of August 7, 2023

Updates to solicitation documents will be posted on the [GFO Webpage](https://www.energy.ca.gov/solicitations/2023-03/gfo-22-610-convenient-high-visibility-low-cost-level-2-charging-chill-2):
<https://www.energy.ca.gov/solicitations/2023-03/gfo-22-610-convenient-high-visibility-low-cost-level-2-charging-chill-2>



Thank You!

Applications are due June 16, 2023, by 11:59 p.m.