**GRANT FUNDING OPPORTUNITY**

**Clean Transportation Program**

**Electric School Bus Bi-Directional Infrastructure**



**Addendum 1**

GFO-22-612

[Solicitation Information](http://www.energy.ca.gov/contracts/index.html)

https://www.energy.ca.gov/funding-opportunities/solicitations

State of California

California Energy Commission

[~~March 2023~~] **May 2023**

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# I. Introduction

## Purpose of Solicitation

This is a two-phased competitive grant solicitation. The California Energy Commission’s (CEC’s) Clean Transportation Program announces the availability of up to $15,000,000 in grant funds for Phase 1 projects that will install bi-directional direct current fast charging stations at key building sites throughout California **that support** school districts. (See sections below for information on Phase 2). The purpose of this solicitation is to fund projects that support the ability to enable managed charging and bi-directional power flow for electric school buses and their associated infrastructure.

As California has seen over the last few summers, and as is expected to be the case for years to come, extreme heat and other climate change impacts threaten the reliability of California’s electrical grid. California must now account for increasing levels of large fires, droughts beyond historical levels, and increased energy demand due to hotter temperatures. Additionally, with the continuing threat of wildfires, utilities may proactively schedule Public Safety Power Shutoff (PSPS) events to reduce the risk of their infrastructure causing or contributing to a wildfire. These events can leave communities and essential facilities without power for extended periods of time, creating hardships for vulnerable communities.

The objective of this solicitation is to mitigate the impact of PSPS events and wildfires and to create additional energy resources during periods of high electricity demand. Electric school buses with bi-directional capabilities can help offset some of the impacts and challenges of grid reliability and PSPS events. Some California school districts already have electric school buses that are ready to take advantage of the benefits of vehicle-to-grid integration (VGI), with many more electric school buses expected to be ordered throughout the state in the near future. These districts will need the expertise to understand the most beneficial uses for their new technologies and how they can positively impact their communities.

## Key Activities and Dates

This solicitation will be conducted in two phases. Projects awarded through Phase 1 will install bi-directional charging stations at key building sites throughout California **that support** school districts and create bi-directional charging infrastructure Blueprints that will assist other school districts in planning for installation of bi-directional charging infrastructure. Phase 2 will allow project teams awarded in Phase 1 to utilize the bi-directional charging infrastructure Blueprints to replicate the initial projects [~~in]~~ **that support** additional California school districts.

Phase 1 project teams will be invited to submit applications for Phase 2, following Phase 1 completion. A second solicitation manual will be released outlining further details for Phase 2. A second Notice of Proposed Award (NOPA) and CEC Business Meeting vote will occur for projects selected for Phase 2.

Key activities including dates and times for this solicitation are presented below. An addendum will be released if the dates change for the asterisked (\*) activities. Times listed are Pacific Standard Time or Pacific Daylight Time, whichever is being observed.

|  |  |
| --- | --- |
| **ACTIVITY** | **ACTION DATE** |
| **Phase 1 Activity** | |
| Solicitation Release | April 3, 2023 |
| Pre-Application Workshop\* | April 25, 2023 |
| Deadline for Written Questions\* | May 5, 2023 |
| Anticipated Distribution of Questions/Answers | Week of May 22, 2023 |
| **Deadline to Submit Applications by 11:59 p.m.\*** | **July 12, 2023** |
| Anticipated Notice of Proposed Awards Posting | Week of August 28, 2023 |
| Anticipated CEC Business Meeting | December 2023 |
| **Phase 2 Activity** | |
| Estimated Solicitation Release | December 2025 |
| Estimated Deadline to Submit Applications | March 2026 |
| Estimated Notice of Proposed Awards Posting | May 2026 |
| Estimated CEC Business Meeting | August 2026 |

## Background

The Budget Act of 2021 (Assembly Bill (AB) 128, Ting, Chapter 21, Statutes of 2021, as amended by Senate Bill (SB) 129, Skinner, Chapter 69, Statutes of 2021 and SB 170, Chapter 240, Statutes of 2021) appropriated $785 million from the General Fund to support infrastructure deployments and manufacturing projects for zero-emission light-duty and medium- and heavy-duty vehicles.

AB 118 (Nuñez, Chapter 750, Statutes of 2007), created the Clean Transportation Program. The statute authorizes the CEC to develop and deploy alternative and renewable fuels and advanced transportation technologies to help attain the state’s climate change policies. AB 8 (Perea, Chapter 401, Statutes of 2013) re-authorized the Clean Transportation Program through January 1, 2024, and specified that the CEC allocate up to $20 million per year (or up to 20 percent of each fiscal year’s funds) in funding for hydrogen station development until at least 100 stations are operational.

The Clean Transportation Program has an annual budget of approximately $100 million and provides financial support for projects that:

* Reduce California’s use and dependence on petroleum transportation fuels and increase the use of alternative and renewable fuels and advanced vehicle technologies.
* Produce sustainable alternative and renewable low-carbon fuels in California.
* Expand alternative fueling infrastructure and fueling stations.
* Improve the efficiency, performance and market viability of alternative light-, medium-, and heavy-duty vehicle technologies.
* Retrofit medium- and heavy-duty on-road and non-road vehicle fleets to alternative technologies or fuel use.
* Expand the alternative fueling infrastructure available to existing fleets, public transit, and transportation corridors.
* Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

## Commitment to Diversity

The CEC is committed to ensuring that participation in its Clean Transportation Program reflects the rich and diverse characteristics of California and its people. To meet this commitment, CEC staff conducts outreach efforts and activities to:

* Ensure potential new applicants throughout the state are aware of CEC’s Clean Transportation Program and the funding opportunities the program provides.
* Encourage greater participation by underrepresented groups including disabled veteran-, women-, minority-, and LGBT-owned businesses.
* Assist applicants in understanding how to apply for funding from CEC’s Clean Transportation Program.

## How Award is Determined

Applicants passing administrative and technical screening will compete based on evaluation criteria and will be scored and ranked based on those criteria. Unless CEC exercises any of its other rights regarding this solicitation (e.g., to cancel the solicitation or reduce funding), applications obtaining at least the minimum passing score will be recommended for funding in ranked order until all funds available under this solicitation are exhausted.

If the funds available under this solicitation are insufficient to fully fund a grant proposal, CEC reserves the right to recommend partially funding that proposal. In this event, the proposed Applicant/Awardee and Commission Agreement Manager (CAM) shall meet and attempt to reach agreement on a reduced scope of work commensurate with the level of available funding.

## Availability of Funds

A total of $15,000,000 is available for awards under Phase 1 of this solicitation. There will be additional funding, amount to be determined, available for Phase 2 awards. CEC, at its sole discretion, reserves the right to increase or decrease the amount of funds available under this solicitation.

## Minimum and Maximum Award Amounts

For Phase 1, projects are eligible for up to 90 percent of the total project costs or $3,000,000, whichever is less. The minimum award amount is $1,000,000. Minimum and maximum funding amounts for Phase 2 projects will be released in the solicitation manual for Phase 2 applications.

## Maximum Number of Applications

Applicants may submit multiple applications under this solicitation for Phase 1 projects. Each proposed project must be separate and distinct and adhere to all requirements contained in this solicitation. If multiple applications are submitted for the same school district, only the highest scoring application will be eligible for funding.

## Pre-Application Workshop

There will be one Pre-Application Workshop for Phase 1; participation in this meeting is optional but encouraged. The Pre-Application Workshop will be held remotely through Zoom, which is the CEC’s online meeting service, at the date and time listed below. Please call the Commission Agreement Officer (CAO) listed in paragraph L below or refer to the [CEC’s solicitation information website](http://www.energy.ca.gov/contracts) at <https://www.energy.ca.gov/funding-opportunities/solicitations> to confirm the date and time.

**Tuesday, April 25, 2023**

10:00 a.m.

## Participation Through Zoom

Zoom is the CEC’s online meeting service. When attending remotely, presentations will appear on your computer/laptop/mobile device screen, and audio may be heard via the device or telephone. Please be aware that the Zoom meeting will be recorded.

**Zoom Instructions:**

To join this workshop, go to Zoom at: https://energy.zoom.us/webinar/register/WN\_ia2I6d8wQNqt2BI54DBP6w. You may also access the workshop by going to the [Zoom webpage](https://join.zoom.us) at https://join.zoom.us and enter the unique meeting ID and password below:

**Meeting ID:** 878 6189 1584

**Meeting Password:**  294011

**Topic:** Electric School Bus Bi-Directional Infrastructure

**Telephone Access Only:**

Call (888) 853-5257 or (888) 475-4499 (toll-free). When prompted, enter the unique meeting ID number above. To comment over the telephone, dial \*9 to “raise your hand” and \*6 to mute/unmute your phone line.

**Access by Mobile Device:**

Download the application from the Zoom Download Center, <https://energy.zoom.us/download>

**Technical Support:**

For assistance with problems or questions about joining or attending the meeting, please call Zoom technical support at (888) 799-9666 ext. 2, or you may contact the CEC’s Public Advisor’s Office at [publicadvisor@energy.ca.gov](mailto:publicadvisor@energy.ca.gov), or (800) 822-6228.

To determine whether your computer is compatible with Zoom, visit:

https://support.zoom.us/hc/en-us/articles/201362023-System-requirements-for-Windows-macOS-and-Linux.

## Questions

Applicants may ask questions at the Pre-Application Workshop, and may submit written questions via e-mail to the CAO listed in Part I of this solicitation. However, all technical questions must be received by the deadline listed in the “Key Activities and Dates” table above. Questions received after the deadline may be answered at the CEC’s discretion. Non-technical questions (e.g., questions concerning application format requirements or attachment instructions) may be submitted to the CAO at any time prior to 5:00 p.m. of the application deadline date.

The question and answer will be posted on the [CEC’s solicitation information website](http://www.energy.ca.gov/contracts/index.html) at [www.energy.ca.gov/contracts/index.html](http://www.energy.ca.gov/contracts/index.html).

Any verbal communication with a CEC employee concerning this solicitation is not binding on the State and shall in no way alter a specification, term, or condition of the solicitation. All communication must be directed in writing to the CAO assigned to the solicitation.

## Contact Information

Crystal Willis, Commission Agreement Officer

California Energy Commission

715 P Street, MS-18

Sacramento, California 95814

Telephone: (916) 529-1108

E-mail: Insert [crystal.willis@energy.ca.gov](mailto:crystal.willis@energy.ca.gov)

## Reference Documents

Applicants responding to this solicitation may want to familiarize themselves with the following documents:

1. [2022-2023 Investment Plan Update for the Clean Transportation Program (CEC-600-2022-062)](https://www.energy.ca.gov/publications/2022/2022-2023-investment-plan-update-clean-transportation-program)  https://www.energy.ca.gov/publications/2022/2022-2023-investment-plan-update-clean-transportation-program
2. [Senate Bill 129 Budget Act of 2021](file:///C:\Users\LJansen\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\Senate%20Bill 129%20Budget%20Act%20of%202021 )

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=202120220SB129

1. [Senate Bill 170 Budget Act of 2021](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB170) https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=202120220SB170
2. [Senate Bill 154 Budget Act of 2022](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB154)

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=202120220SB154

1. [Assembly Bill 178 Budget Act of 2022](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB178)
2. https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\_id=202120220AB178
3. [CalEnviroScreen](https://caenergy.sharepoint.com/sites/FTD/Shared%20Documents/FTD%20Shared%20Files/Solicitations/2022/GFO-22-%23%23%23%20(Electric%20School%20Bus%20Bi-Directional%20Infrastructure)/1.%20Original%20Solicitation/Routing%20Package/CalEnviroScreen)

https://oehha.ca.gov/calenviroscreen

1. [California Climate Investments Priority Populations Map](https://webmaps.arb.ca.gov/PriorityPopulations/) https://webmaps.arb.ca.gov/PriorityPopulations/
2. [Energy Commission Agreement Management System (ECAMS)](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources
3. [Grant Recipient and Contractor Past Performance Evaluation](https://www.energy.ca.gov/sites/default/files/2022-01/Contractor_Past_Performance_Evaluation_FTD_ADA.pdf) https://www.energy.ca.gov/sites/default/files/2022-01/Contractor\_Past\_Performance\_Evaluation\_FTD\_ADA.pdf
4. [Executive Order N-79-20](https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf)

https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf

1. [Executive Order B-48-18](https://www.ca.gov/archive/gov39/2018/01/26/governor-brown-takes-action-to-increase-zero-emission-vehicles-fund-new-climate-investments/index.html) <https://www.ca.gov/archive/gov39/2018/01/26/governor-brown-takes-action-to-increase-zero-emission-vehicles-fund-new-climate-investments/index.html>
2. California Public Utilities Commission High Fire Threat District https://capuc.maps.arcgis.com/apps/webappviewer/index.html?id=5bdb921d747a46929d9f00dbdb6d0fa2

# II. Eligibility Requirements

## Applicant Requirements

1. **Eligibility**

Phase 1 of this solicitation is open to all private entities with a business presence in California. To be eligible, Applicants must be involved in the electric vehicle or charging equipment business, including, but not limited to:

* Electric vehicle (EV) charging product manufacturers – Entities that manufacture and develop charging equipment and products.
* Electric vehicle service providers (EVSPs) – Entities that manage connectivity across a network of chargers and/or offer software solutions using EV charging equipment.

Applicants **are required** **to partner with at least one school district and are** encouraged to partner with **other** school districts, utilities, local city or county government authorities, nonprofit entities, community-based organizations, environmental organizations, local workforce development agencies, technology vendors, researchers, and financiers throughout the application process.

Phase 2 of this solicitation is open to all project teams awarded in Phase 1.

1. **Responsibilities of Awardee and Project Team**

Should an Applicant be awarded a grant, the Awardee will be responsible for administration of the project.

The Awardee’s major responsibilities will include, but are not limited to, the following:

* Developing and maintaining a project team that includes technology manufacturers, subcontractors, end-users, community-based organizations (CBOs), and a data collection and analysis provider.
* Administering the project.
* Ensuring completion of required California Environmental Quality Act (CEQA) documents.
* Overseeing construction and installation subcontractors.
* Overseeing project budget, completion of milestones, and verifying the receipt of deliverables and the amount of funds being used for the project’s match requirement.
* Reporting to the CEC on project status, grant performance, and match expenditures.
* Submitting quarterly project reports to the CEC.
* Preparing and presenting at least two Critical Project Reviews to the CEC.
* Submitting periodic grant disbursement requests to the CEC.
* Submitting data, as requested by the CEC.
* Coordinating periodic project status update meetings.

1. **Terms and Conditions**

Each grant agreement resulting from this solicitation will include terms and conditions that set forth the grant recipient’s rights and responsibilities. By providing the authorizations and certifications required under this solicitation, each Applicant agrees to enter into an agreement, if awarded, with the CEC to conduct the proposed project according to the terms and conditions that correspond to its organization, without negotiation: (1) University of California and California State University terms and conditions; (2) U.S. Department of Energy terms and conditions; or (3) standard terms and conditions. The standard terms and conditions are located at CEC’s funding resources website: https://www.energy.ca.gov/funding-opportunities/funding-resources.

Failure to agree to the terms and conditions by taking actions such as failing to provide the required authorizations and certifications or indicating that acceptance is based on modification of the terms may result in rejection of the application. Applicants must read the terms and conditions carefully. CEC reserves the right to modify the terms and conditions prior to executing grant agreements.

1. **California Secretary of State Registration**

All corporations, limited liability companies (LLCs), limited partnerships (LPs) and limited liability partnerships (LLPs) that conduct intrastate business in California are required to be registered and in good standing with the California Secretary of State prior to its project being recommended for approval at a CEC Business Meeting. If not currently registered with the California Secretary of State, Applicants are encouraged to contact the Secretary of State’s Office as soon as possible to avoid potential delays in beginning the proposed project(s) (should the application be proposed for funding). For more information, contact the Secretary of State’s Office via the Secretary of State Office’s website at www.sos.ca.gov. Sole proprietors using a fictitious business name must be registered with the appropriate county and provide evidence of registration to CEC prior to their project being recommended for approval at a CEC Business Meeting.

## Project Requirements (Phase 1)

* + - 1. **Eligible Projects**

All projects must deploy and demonstrate EV charging infrastructure with capabilities for bi-directional power flow at two or more locations **that support** school districts in California. Projects should propose an integrative community design to tailor technologies and equipment to suit a school district’s needs. The demonstration period will cover the 12 months of required data collection.   
  
Examples of project types may include, but are not limited to:

* One school district installing bi-directional depot charging at a primary location and at a secondary location.
* Multiple school districts, in different geographic locations throughout the state, demonstrating bi-directional charging infrastructure to allow for a variety of scenarios and data to be tested and collected. Scenarios could include, but are not limited to:
  + - * Operating in different climates or terrain.
      * Operating with different route lengths.
      * Operating with different bus sizes or manufacturers.
* Multiple school districts with varying fleet sizes, demonstrating what size of fleets are ideal for bi-directional use cases.
* Multiple school districts installing bi-directional charging infrastructure in different utility use areas.

1. **Serving Underserved Communities**

Applicants must demonstrate how proposed projects will support air quality improvements in and provide benefits to disadvantaged and low-income communities, priority populations, and/or tribal lands.   
  
Proposed projects located in low-income communities[[1]](#footnote-2), disadvantaged communities[[2]](#footnote-3), communities that have high percentages of free and reduced-price lunch program use, are in grid constrained areas, or are in tier 2 or 3 fire risk districts will be prioritized in accordance with the evaluation criteria.

1. **Charging Equipment**

All infrastructure must be utilized by electric school buses with existing VGI capabilities using a CCS-1 connector. Bi-directional charging systems used or installed during this project shall meet all Minimum Technical Requirements listed below. Projects may exceed the Minimum Technical Requirements listed below.

**Table 1: Minimum Technical Requirements**

|  |  |
| --- | --- |
| **Requirement** | **Minimum Technical Requirement** |
| Capable of bi-directional charging | * Using the CCS-1 connector |
| Capable of digital communication | * Hardware ready for ISO 15118-20 |
| Compliant with Open Charge Point Protocol | * 1.6 or later |
| Certified to Underwriter Laboratories (UL) Inverter Certifications | * Technical design with the most current UL 1741 Supplement required to support interconnection of the charger in California |
| Capable of responding to a Demand Response Program | * Export Compensation Program enrollment (such as Emergency Load Reduction Program (ELRP) or the Demand Side Grid Support (DSGS) Program) * 3-year participation in program of choice * Waived for installations where a demand response program is not available |
| Number of Buses per Project | * Minimum of 3 Bi-Directional-Capable Electric School buses at each project location |
| Maintenance and Operation | * Minimum of 9 years maintenance and operation records of bi-directional equipment and buses after the end of the project term |

1. **Electric Vehicle Infrastructure Training Program (EVITP)**

All projects must meet the requirements of AB 841 (Ting, 2020) which added Public Utilities Code (PUC) section 740.20, and requires Electric Vehicle Infrastructure Training Program (EVITP) certification to install EV charging infrastructure and equipment for work performed on or after January 1, 2022, subject to certain exceptions.

All EV charging infrastructure and equipment located on the customer side of the electrical meter shall be installed by a contractor with the appropriate license classification, as determined by the Contractors’ State License Board, and at least one electrician on each crew, at any given time, who holds an EVITP certification. Projects that include installation of a charging port supplying 25 kilowatts or more to a vehicle must have at least 25 percent of the total electricians working on the crew for the project, at any given time, who hold EVITP certification. One member of each crew may be both the contractor and an EVITP certified electrician. The requirements stated in this paragraph do not apply to any of the following:

* Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility.
* Electric vehicle charging infrastructure funded by moneys derived from credits generated from the Low Carbon Fuel Standard Program (Subarticle 7 (commencing with Section 95480) of Article 4 of Subchapter 10 of Chapter 1 of Division 3 of Title 17 of the California Code of Regulations).
* Single-family home residential EV chargers that can use an existing 208/240-volt outlet.

1. **Blueprint Requirements**

All projects must use their experience in this project installing bi-directional charging infrastructure for school buses to develop a bi-directional charging infrastructure Blueprint that will assist other school districts in planning for installation of bi-directional charging infrastructure. Blueprints will include a baseline assessment of existing transportation and electrical needs and a detailed description of the planning and process utilized to gain utility approval; the technologies chosen by the school districts for their buses, infrastructure, and charging control; recommendations for next steps; an evaluation of the facility infrastructure; a resiliency plan; and full cost analysis. The Blueprint for bi-directional charging infrastructure should be structured as follows:

* Identify the actions and milestones needed for implementation of bi-directional charging infrastructure.
  + Identify optimal locations for bi-directional charging infrastructure deployment and the rationale for being considered optimal.
  + Electric school bus usage and driving patterns in order to maximize and optimize the type and placement of bi-directional charging infrastructure to support the buses and the grid.
* Minimize the risks and uncertainties surrounding the design, permitting, planning, and financing of bi-directional charging infrastructure network through engagement.
  + Engage utilities to support grid delivery, reliability, and resiliency.
  + Address impacts of increased charging on utility rates.
  + Engage local jurisdictions and planning organizations to ensure they are involved in the planning and permitting of the infrastructure.
  + Engage regional workplaces, business owners, and operators in the planning process and education on the benefits of bi-directional charging infrastructure.
  + Engage regional CBOs, community leaders, California Native American Tribes, and potentially affected local residents in the planning process and education on the benefits of zero-emission vehicle (ZEV) transportation. With regional organizations, determine if a community-needs assessment is warranted and develop an appropriate scope.
  + Engage financial institutions to ensure they are educated, involved, and committed to participate in the implementation of the bi-directional charging infrastructure blueprint.
* Analyze the combination of technologies and systems that offer the best mix of economic, environmental, and technical performance specific to the project/region.
  + Explore innovative bi-directional charging infrastructure options to address potential infrastructure barriers. Technology options may include wireless charging, high-powered charging, overhead catenary systems, solar chargers, robotic chargers, mobile chargers/refuelers, curbside, streetlamp, and intersection chargers, or autonomous garages.
  + Include appropriate VGI standards and open standards-based network communications.
    - * + Include the ability to support emerging connectors and/or interfaces for heavy-duty vehicles, open standards-based network communications, the inclusion of appropriate VGI standards, and/or other methods for enhancing grid-reliability by providing data to utilities to predict charging behavior and associated impacts on the grid.
        + Include the use of interoperable medium- and heavy-duty (MD/HD) charging connectors and/or charging interfaces compatible with MD/HD vehicles sold by multiple original automotive equipment manufacturers for widespread use across California and North America.
        + Include other methods for enhancing grid-reliability by providing data to utilities to predict charging behavior and associated impacts on the grid.
* Document actions or steps adopted by the local jurisdiction and the impact of those actions or steps on the development of bi-directional charging infrastructure.
* Identify analytical tools, software applications, and data needed to improve future bi-directional charging infrastructure planning activities.
* Identify each task or area of responsibility required of the project partners and stakeholder groups to develop a replicable approach for other fleets transitioning to zero-emission and bi-directional charging infrastructure.
* Describe the outreach strategy necessary for local communities, supported by education and outreach materials appropriate for potentially affected residents, in the languages needed for those communities.
* Describe collaboration with community colleges, CBOs and community leaders to develop workforce development strategies that enable training, education, and readiness for the local community workforce to obtain the requisite knowledge, skills, and ability to develop, support, and maintain the MD/HD ZEV fleets.
* Summarize the types of jobs that could be created for the local community.
* Identify goals to reduce greenhouse gas (GHG) emissions, criteria air pollutants, and toxic air contaminants for the region, and the emitters at the local level that would need to be targeted.
* Identify the benefits that would accrue to High Fire-Threat Districts, disadvantaged communities (DACs), low-income communities, priority populations, and/or tribal lands to the maximum extent possible. Address health and safety, access and education, financial benefits, economic development, and consumer protection.

1. **Requirements for Charging Equipment Installed After January 1, 2024**

In addition to the other requirements set forth in this application manual and the law, EV chargers and charging stations installed on or after January 1, 2024 must comply with recordkeeping and reporting standards which CEC is currently in the process of developing. As background, AB 2061 (Ting, 2022) and Cal. Pub. Resources Code sect. 25231.5 require the CEC, in consultation with the CPUC, to develop recordkeeping and reporting standards for EV chargers and charging stations. CEC is working to develop regulations in compliance with AB 2061. Other requirements, including but not limited to uptime and operation and maintenance requirements, may also be adopted by regulation. Once these regulations are finalized, chargers which are installed on or after January 1, 2024, including chargers installed under agreements resulting from this solicitation, will need to comply with the new regulations. Applicants to this solicitation must be prepared to comply with any new or updated regulations, even if the regulations are not in existence at the time of application to this solicitation.

1. **Operations and Reliability**

The Recipient will be required to meet operations and reliability standards as specified in the Scope of Work (Attachment 2).

The Recipient will be responsible for payment of all operating costs, including but not limited to payment of leases, rents, royalties, licenses, fees, taxes, revenue sharing, utilities, and electric power supply for the charging equipment and supporting elements, such as area lighting.

The Recipient will be responsible for ensuring the maintenance of the charging station pedestals, and all ancillary equipment, including but not limited to any awnings, canopies, shelters and information display kiosks or signage associated with the charging station. “Maintain,” as used in this solicitation means “to provide all needed repairs or desired and approved alteration, as well as to clean the equipment and keep it safe, clean, and presentable.”

The CEC may reimburse for maintenance of the equipment during the term of the agreement if maintenance is in the executed agreement budget. Eligible maintenance costs must meet the following general requirements. In some instances, whether costs meet these general requirements will be determined by the CEC in its sole discretion, on a case-by-case basis.

* Costs must be documentable and measurable.
* Costs must be non-duplicative of other reimbursed or match share costs.
* Costs must be reasonable and allocable to the eligible charging stations.

## Eligible Project Costs

* + - * 1. Costs incurred for the following are eligible for CEC reimbursement or as the Applicant’s match share and can include, but are not limited to:
* Bi-directional capable electric vehicle supply equipment (EVSE or chargers)
* Transformers
* Electric panels
* Electricity transmission materials (wiring, conduit, hangers, etc.)
* Energy storage equipment
* Photovoltaic solar panels or other distributed energy resources (DER) separately metered for electric vehicle charging (total cost not to exceed 20 percent of total project cost)
* Installation/construction costs for eligible equipment
* Maintenance facility upgrades for eligible equipment
* Utility service upgrades and integration (only if these costs will not be reimbursed by an existing utility program)
* Planning and engineering design costs
* Network agreement with network provider
* Extended warranties
* Stub-outs
* Demand management equipment
* Equipment maintenance, facility maintenance, or maintenance agreements
* Data collection equipment
* Outreach, project management, reporting, and blueprint development
* Training (including safety training) for school bus fleet staff who work with electric school buses and infrastructure.

## D. Match Funding Requirements

**1.** **Total Match Share Requirement**

Applications must include a minimum match of 10 percent of the total project costs.

“Match funding” or “match share” means cash or in-kind (non-cash) contributions provided by the Applicant/grant recipient, subrecipients, or other parties that will be used in performance of the proposed project.Match share percentage is calculated by dividing the total match share contributions by the total allowable project cost. *“*Total allowable project cost” is the sum of the CEC’s reimbursable share and Recipient’s match share of the project costs. Match share expenditures have the following requirements:

* At a minimum, total match share must conform to the “Cash Match Share Requirement” contained in this solicitation.
* All match share expenditures must conform to the terms and conditions of this solicitation and the resulting grant agreement (see Attachment 9).
* Applicants must disclose the source and provide verification and documentation for the match share funding committed to the project. (For any match share committed by a third party (i.e., other than match share committed by the Applicant), Applicants are encouraged to submit a letter from each match share partner identifying the source(s) and availability of match funding.)
* During the term of the agreement, grant recipients will be required to document and verify all match share expenditures through invoices submitted to CEC.
* Match share funding may be in the form of cash or in-kind contributions such as donated labor hours, equipment, facilities, and other property.
* Equipment, facilities, and property may count as match funds as long as the value of the contribution is based on documented market values or book values, prorated for its use in the project, and depreciated or amortized over the term of the project using generally accepted accounting principles (GAAP).
* Match share expenditures (cash and/or in-kind) must be documented, reasonable, allowable, and allocable to the project as determined by CEC.
* Match share expenditures are allowable under an agreement only if they are incurred after CEC notifies the Applicant that its project has been proposed for an award through the release of a Notice of Proposed Awards (NOPA). Match expenditures incurred after the release of the NOPA but prior to the execution of an agreement are made at the Applicant’s own risk. CEC is not liable for Applicant’s match share costs if the grant is not approved, if execution is delayed, or if the match share expenditure is not allowable under the terms and conditions of the grant agreement or this solicitation. Please note that all non-match expenditures incurred prior to agreement execution are not reimbursable from CEC funds.
  + - * 1. **Cash Match Share Requirement**

Cash match share is not required under this solicitation. Match may be in-kind or cash.

Cash match means the net of any funds actually expended by the Applicant for the project. Net means after any sort of discount or rebate is applied. Expenditures for Applicant’s compensated labor hours, including allowable fringe benefit and overhead rates, travel, materials, supplies, equipment, subrecipient costs, and other miscellaneous expenditures may be claimed as cash match if the expenditures are included in the approved agreement budget, paid in full with funding sources other than grant funds, and supported with appropriate documentation, including proof of payment. For indirect overhead, backup documentation, such as a cost allocation plan based on actual expenditures incurred and paid, is required. Cost allocations must be reasonable and allocable to the proposed project.

* + - * 1. **In-Kind Match Share**

The balance of the total match share requirement beyond the cash match share requirement (if any) may be met through in-kind match share contributions.

In-kind match share contributions are: 1) non-cash contributions provided by the Applicant; 2) cash or non-cash contributions provided by a subrecipient; and 3) cash or non-cash contributions provided by other third parties. Applicant in-kind match share can be in the form of volunteer labor, real property, existing equipment, existing supplies, services provided by a third-party or subrecipient, and other expendable property. The value of in-kind match is based on the fair market value of the goods and services provided at the time it is claimed as match. In-kind match share must be included in the approved agreement budget and supported with appropriate documentation. Cost allocations must be reasonable and allocable to the proposed project.

* + - * 1. **Match Share Restrictions**
* ***Other Sources of CEC Funding*** – Other sources of CEC funding may not be claimed as match share.
* ***Electric School Buses*** – Electric school buses or other vehicles already in a fleet or purchased during the term of the agreement may not be claimed as match share.
* ***Property Not Owned by the Applicant*** – Donated property may be claimed as match based on the fair market value of renting or leasing the property. Fair market value is based on rental costs of comparable property (if any), market conditions in the area, alternatives available and the type, life expectancy, condition, and value of the property.
* ***Existing Property Owned by the Grant Recipient*** – Applicants may use the property’s depreciation expense as a method to allocate the value of the property to the project. Valuation will need to be documented to support the initial acquisition costs as well as the method of depreciation.
* ***Valuation of Land*** – Land cannot be depreciated. If the value of land is claimed as match, the Applicant must provide documentation to support a fair market value for the use of the land (i.e., rent or lease cost) for the time period it is used. Appraised value of land cannot be used since this represents the full value of the land if it is sold which includes value beyond the term of the proposed project.
* ***Property Owned by a Related Party*** – Related parties are individuals or other entities that are able to control or substantially influence the actions of the Applicant and includes spouses, board members, family members of principals or employees of the Applicant as well as property owned by principals/employees of the Applicant. Because an agreement between an Applicant and a related party is a “less than arms-length” transaction, Applicants must disclose to CEC the relationship between the Applicant and the related party and be able to support the fair market value of property that is claimed as match.

If CEC funds are used to reimburse lease/rental payments for property owned by a related party, the Applicant can only claim the ***lesser*** of fair market value or actual lease payments, regardless of lease agreement terms.

* ***Prorated Value of Property*** – The allowable claimed value of property must be prorated based on the percentage the property is used for the proposed project. For example, if only half of a building is being used for the proposed project, then only 50 percent of the monthly fair market value of the entire building can be claimed as match while the building is being used for the project.
* ***Documentation*** – If selected for an award, all claimed match share expenditures must be adequately documented to CEC during the agreement invoicing process which may include, but is not limited to: the fair market value of existing property, methodology to allocate existing property on a prorated basis, lease agreements, and other appropriate documentation.

## Unallowable Costs (Reimbursable or Match Share)

For an item of cost to be allowable for reimbursement with CEC funds or as a match share expenditure, it must be included in the executed agreement budget and allowable per the terms and conditions of the resulting agreement. The following are examples of unallowable costs under an agreement resulting from this solicitation. This list is not comprehensive and additional items of cost may be unallowable in accordance with the agreement terms and conditions.

1. ***Purchase of Electric School Buses*** – Projects are expected to provide infrastructure for existing electric school bus fleets.
2. ***Forgone Profit*** – For example, if a company usually charges 10 percent profit but only charges 4 percent to CEC, the unclaimed difference is not an allowable item of cost.
3. ***Forgone Rent*** – For example, rent that is not paid is not an allowable item of cost.
4. ***Discounted or Refunded Equipment Costs*** – For example, a claim that equipment costs $10,000 but the grant recipient only pays $6,000 due to some “special” discount. The difference of $4,000 is not an allowable match share expense. Another example is if the grant recipient actually pays $10,000 but the vendor refunds $4,000 – only the net $6,000 is an allowable item of cost.
5. ***Foregone Salary, Fringe, Indirect or Other Types of Cost*** – For example, a person normally charges or is paid $100 per hour, but will only charge $50 per hour towards the CEC award. Only actual costs incurred and paid to the employee are allowable. Therefore, if an employee is ***actually*** paid $100 per hour and CEC only reimburses at $40 per hour, then the unreimbursed $60 per hour is an allowable match share cost because this is an actual payment as opposed to a foregone salary amount. Volunteer labor (i.e., labor from a person who does not receive any compensation for their labor) may be an allowable in-kind match share expense if the value of the labor is reasonable and justified.

# III. Application Format, Required Documents, and Delivery

## Required Format for an Application

This section contains the format requirements and instructions on how to submit an application. The format is prescribed to assist the Applicant in meeting State requirements and to enable CEC to evaluate each application uniformly and fairly. Applicants must follow all application format instructions, answer all questions, and supply all requested information.

All applications submitted under this solicitation must be typed or printed using a standard 11-point font, single-spaced and a blank line between paragraphs. Pages must be numbered and sections titled.

## Method For Delivery

The method of delivery for this solicitation is the [CEC’s Grant Solicitation System](https://gss.energy.ca.gov/)(GSS), available at https://gss.energy.ca.gov/. This online tool allows Applicants to submit their electronic documents to CEC prior to the date and time specified in this solicitation. Electronic files must be in Microsoft Word (.doc format) and Excel Office Suite formats unless originally provided in the solicitation in another format. Completed Budget Forms, Attachment 5, must be in Excel format.

The deadline to submit grant applications through the CEC’s GSS is **11:59 p.m**. The GSS system automatically closes at 11:59 pm. If the full submittal process has not been completed before 11:59 p.m., your application will not be considered. NO EXCEPTIONS will be entertained.

The CEC strongly encourages Applicants to upload and submit all applications by 5:00 p.m. because CEC staff will not be available after 5:00 p.m. or on weekends to assist with the upload process. And please note that while we endeavor to assist all would-be applicants, we can’t guarantee staff will be available for in-person consultation on the due date, so please plan accordingly.

Please give yourself ample time to complete all steps of the submission process: do not wait until right before the deadline to begin the process. Due to factors outside the CEC’s control and unrelated to the GSS system, upload times may be much longer than expected. For example, some past applicants experienced unexpected issues on their end, causing long delays that prevented timely submission. They spent significant time and resources on applications the CEC will not consider. Please plan accordingly. For instructions on how to apply using the GSS system, please see the How to Apply document available on the CEC website at: [https://www.energy.ca.gov/media/1654](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.energy.ca.gov%2Fmedia%2F1654&data=04%7C01%7C%7C817e9b823203445df9fb08d99e6003f0%7Cac3a124413f44ef68d1bbaa27148194e%7C0%7C0%7C637714957481962127%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=0kp4Rrki60lwhuOQrx%2F%2BM7B48HdUhQtmDQX1dGbf6Rc%3D&reserved=0).

First time users must register as a new user to access the system. Applicants will receive a confirmation email after all required documents have been successfully uploaded. A tutorial of the system will be provided at the pre-application workshop and you may contact the CAO identified in the Questions section of the solicitation for more assistance.

## Page Limitations

The number of pages for the project narrative for each application is limited to 30 pages.

## Application Content

All items listed below are required as part of the application package. Failure to provide any items may result in disqualification of the application. Attachment requirements are expanded and explained below in this section and in the attachments themselves. The items that have “N/A” in the “Attachment Number” column are required to be submitted as part of the application package, but do not have an associated attachment provided in this solicitation package.

|  |  |  |
| --- | --- | --- |
| **Item** | **Attachment Number (if applicable)** | **Action Needed by Applicant** |
| Application Form | Attachment 1 | Complete form |
| Table of Contents | N/A | Create referenced document |
| Project Narrative | N/A | Create referenced document |
| Scope of Work | Attachment 2 | Complete document |
| Schedule of Products and Due Dates | Attachment 4 | Complete document |
| Budget Forms | Attachment 5 | Complete form |
| Resumes | N/A | Create referenced document |
| Contact List | Attachment 6 | Complete document |
| Operation and Reliability Plan | N/A | Create referenced document |
| Letters of Support/Commitment | N/A | Create referenced document |
| CEQA Worksheet | Attachment 7 | Complete document |
| Localized Health Impacts Information Form | Attachment 8 | Complete form |
| Past Performance Reference Form(s) | Attachment 10 | Complete form |

1. **Application Form (Attachment 1)**

Applicants must include a completed Application Form.

All applicants must authorize CEC to make any inquiries necessary to verify the information presented in the application. Further, all Applicants must authorize CEC to obtain a credit report on the Applicant’s organization.

All Applicants must certify under penalty of perjury under the laws of the State of California that:

* The application does not contain any confidential or proprietary information.
* All information in the application is correct and complete to the best of the Applicant’s knowledge.
* The Applicant has read and understands the terms and conditions and will accept them without negotiation if awarded.
* The Applicant has received any required licenses (such as copyrights or trademarks) applicable to the submitted application.
* The person electronically submitting the application through the Grant Solicitation System is an authorized representative of the Applicant.

***For Applicants using the electronic submission through the Grant Solicitation System***, checking the “I Agree” box and clicking the “I Agree & Submit” button provides the required authorizations and certifications.

The CEC **may** have waived the requirement for a signature on application materials for this solicitation. If a notice regarding the CEC’s waiver of the signature requirement appears on the [CEC's solicitation information website](https://www.energy.ca.gov/funding-opportunities/solicitations): https://www.energy.ca.gov/funding-opportunities/solicitations, the waiver applies to this solicitation. In the event of a conflict between the notice and any language in this solicitation regarding signatures, the notice will govern.

1. **Table of Contents**

Each application must include a Table of Contents that allows for easy navigation and location of relevant information. This will not count towards the page limitation.

1. **Project Narrative**

The Project Narrative is limited to a maximum of 30 pages. It must include a table of contents (which will not count towards the page limitations) and a detailed description of the proposed project, its operational goals and objectives, and an explanation of how these will be implemented through the tasks described in the Scope of Work.

Applicants must address each of the scoring criteria described in this solicitation by providing sufficient, unambiguous detail so that the evaluation team will be able to evaluate the application against each scoring criterion.

The Project Narrative must respond directly to each criterion with the headings as titled below, and must include the following information:

1. **Project Implementation** 
   1. Explain how the proposed project locations will benefit California**, at least one school district,** and grid reliability.
   2. Explain how the locations in the proposal have a strong need for the grid benefits of bi-directional charging and grid integration.
   3. Explain any capabilities to support the grid during grid emergencies, such as automated response to Flex Alerts and participation in demand response programs such as the Emergency Load Reduction Program or Demand Side Grid Support Program.
   4. Explain any integration, enrollment, and managed charging with time-varying electricity rates such as time of use rates, EV rates (including those supporting export), or dynamic rates. Explain any charger management strategies to automate charging during low-price periods while ensuring vehicles are ready for transport when needed.
   5. Provide the percentage of the locations in the proposal that are in low-income communities, disadvantaged communities, have high percentages of free and reduced-price lunch program use, are in grid constrained areas, are in tier 2 or 3 fire risk districts or otherwise demonstrate a need for bi-directional charging.
   6. Explain how the equipment to be deployed is appropriate for the proposed project and will lead to the successful deployment of bi-directional charging infrastructure for electric school buses and demonstration of the benefits for school districts.
   7. Describe any plans to use bi-directional chargers and electric school buses to provide power to local loads during grid outages. Describe any site integration and engineering to accommodate islanded bi-directional charger operation.
   8. Provide details about the commercial availability of the proposed equipment.
   9. Explain how the project team will work with electrical utility providers to ensure sufficient local grid capacity to support bi-directional charging and electric school buses. Explain coordination with electrical utility providers to ensure timely interconnection of bi-directional chargers. Describe whether bi-directional chargers will be used for grid export or simply for local load reductions.
   10. Explain how the proposed project will lead to understanding utility and district requirements for grid integration.
   11. Explain how the project team will accomplish required government certification and verification protocols, such as infrastructure construction permits, and licenses to operate.
   12. Explain how the equipment used in the project will comply with relevant codes and standards, and support interoperable and scalable bi-directional charging, including but not limited to:
       * 1. UL 1741, including the most current UL 1741 Supplement required to support interconnection of the charger in California.
         2. ISO 15118-20. Explain how the project will build upon ISO 15118 hardware ready chargers and implement ISO 15118-20 software for bi-directional charging, smart charging, Plug and Charge, and/or other use cases. Explain how the project will support interoperable bi-directional charging.
         3. Open Charge Point Protocol. Explain plans to ensure that chargers installed during the project are compliant with Open Charge Point Protocol, including any plans for certifying chargers through the Open Charge Alliance. Describe support for easy network migration (that is, switching from one Open Charge Point Protocol network to another). Explain any use of Open Charge Point Protocol to manage the bi-directional chargers installed during the project.
   13. Provide plans to maintain and operate the electric school buses and infrastructure as required in the Scope of Work.
   14. Explain how the proposed project will successfully lead to future VGI for other school districts and similar fleets.
   15. Explain how the project will maximize the dissemination of data, results, and lessons for knowledge transfer.
2. **Project Readiness**

Describe how the project will be effectively implemented addressing:

1. Complete and sequential tasks in the Scope of Work and dates in the Project Schedule and Due Dates that will lead to successful and timely completion of the proposed project.
2. Demonstrated site control for the proposed project sites.
3. Demonstrated commitment from school districts, technology providers, and utilities.
4. Progress in obtaining permits for the proposed project sites.
5. Progress in achieving compliance under California Environmental Quality Act (CEQA) or expedited plans for obtaining CEQA compliance by December 1, 2023.
6. **Project Benefits**

Describe how:

* + - 1. The proposed project will support grid reliability and customer savings. Describe any plans for integrating with and participating in the Emergency Load Reduction Program, the Demand Side Grid Support Program, other demand response programs, EV rates, dynamic rates, and/or other strategies and programs supporting grid reliability and customer savings.
      2. The proposed project will maximize kilowatt-hour (kWh) storage capacity.
      3. The number of electric school buses involved will maximize electricity supply when exporting electricity.
      4. The proposed equipment will be able to provide power, if necessary, when the grid is unavailable.
      5. The project will benefit communities, including emission reductions, public health, economic, and cost-saving benefits.
      6. The project will benefit the distribution grid and support reliability. Benefits may include, but are not limited to:
         1. Reducing load, particularly as a demand response resource during net peak hours (4 pm – 9 pm).
         2. Safely exporting power to the grid.
         3. Reducing local grid congestion.
      7. The project will be capable of handling general daily or weekly grid condition net peaks.
      8. The project will be capable of handling emergency situations such as flex alerts and extreme annual conditions.

1. **Team Experience and Qualifications**

Describe how:

* + - 1. The project team’s qualifications are suitable to the tasks described in the proposed Scope of Work.
      2. The project team demonstrates the ability to establish and adhere to realistic and expeditious timelines.
      3. The project team has verifiable experience and knowledge related to the following:
         1. Installation of high-quality bi-directional charging infrastructure projects.
         2. Understanding of current UL and SAE standards relevant to this project. Understanding of communication protocols needed to enable and manage interoperable bi-directional charging, including Open Charge Point Protocol and ISO 15118-20.
         3. Working with school districts, utilities, and charging infrastructure providers.
         4. California-specific needs and opportunities related to permitting and other requirements.
         5. Conducting outreach and education about bi-directional charging infrastructure projects, and how to get such projects completed.
         6. Collecting project data from subrecipients.
         7. Bringing project-related benefits to Priority Populations.
         8. Knowledge of industry entities that are likely to participate in bi-directional charging infrastructure projects.
         9. Working with small businesses, rural communities, community-based organizations, community leaders, Native American tribes, low-income communities, and disadvantaged communities.
         10. Collection, management, maintenance, and reporting on large amounts of data.
      4. The technology providers are established and have records of supporting their products.
      5. The Applicant and project team have demonstrated exceptional administrative and technical performance under existing or prior funding agreements (CEC and/or other public agencies), if the Applicant worked on such projects, including:
      6. Adherence to schedule and due dates.
      7. Effective and timely issue resolution.
      8. Quality of deliverables.
      9. Objectives of past projects have been attained.
      10. Honest, timely, and professional communication with staff from the funding entity.
      11. Effective coordination with project partners, subrecipients, and other stakeholders.
      12. Timely and accurate invoicing.

1. **Project Budget**

Describe how:

1. The proposed project budget is cost-effective and appropriate to the purpose of this solicitation.
2. Administrative and overhead expenses are minimized.
3. State funds are necessary for the proposed project.
4. The source, type, and amount of Match Share funds are described, documented, and committed to the proposed project.
5. **Operation and Reliability Plan**

Describe how:

* 1. The project will maximize uptime.
  2. Operation and reliability, as described in the Operation and Reliability Plan, exceeds the solicitation’s minimum standards as set in the Scope of Work.
  3. The Operation and Reliability Plan demonstrates availability of qualified technicians and replacement parts. Remote monitoring, diagnostics, updates, and repairs will effectively measure and reduce downtime.
  4. The Applicant effectively addresses interoperability of chargers and vehicles.
  5. Customer service and site host training support awareness of and prompt attention to chargers that are not operational.

1. **Innovation**

Describe how:

1. The project is innovative and fits the specific locations, use case, and utility.
2. The project addresses limited power distribution capacity and/or mitigates negative grid impacts.
3. The project demonstrates the ability to improve resiliency of California’s grid and response to extreme weather events and other emergencies.
4. The project includes innovative approaches to operations for enhanced customer experience, providing innovative business models or technologies, and methods to reduce operations and maintenance costs.
5. **Scope of Work (Attachment 2)**

Applicants must include a completed Scope of Work utilizing the template contained in Attachment 2. Instructions for completing the Scope of Work as well as a sample are included in Attachment 3. The description of activities proposed in the Project Narrative must conform to the tasks described in the Scope of Work. Electronic files for the Scope of Work must be in MS Word.

Applicants must present a comprehensive and credible Scope of Work which includes (presented in a logical manner) comprehensive and sequential tasks, products resulting from the individual tasks, and how the tasks are related to or are dependent on each other.

1. **Schedule of Products and Due Dates (Attachment 4)**

Applicants must include a completed Schedule of Products and Due Dates. All project work must be scheduled for completion by no later than **March 31, 2026**, to allow timely processing of final invoices before the liquidation date of the CEC funds. Instructions for the Schedule of Products and Due Dates are included in Attachment 4. The Schedule of Products and Due Dates must be in MS Excel.

1. **Budget Forms (Attachment 5)**
2. The Applicant must submit information on ***all*** tabs of the budget forms. The salaries, rates, and other costs entered must reflect the salaries, rates, and other costs the Applicant would include if selected as a grant recipient. A separate set of complete budget forms is required for the Applicant and for each subaward containing $100,000 or more of CEC funds.
3. Detailed instructions for completing these forms are included at the beginning of Attachment 5.
4. Rates and job descriptions shown must reflect rates and job descriptions charged under an agreement resulting from this solicitation. The salaries, rates, and other costs entered on these forms become a part of the final agreement. The entire term of the agreement and projected rate increases must be considered when preparing the budget. Unless a federally approved indirect rate is used, indirect rates proposed are considered capped and shall not change during the term of the agreement. The grant recipient shall only be reimbursed for their ***actual*** rates up to the indirect rate cap. A description of available indirect rate options is available on the ECAMS Resources webpage under [Budget Category Guidance](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources/budget-category-guidance?auHash=cEItgat6JNbO9BFGeVqe4E5T6koCOgTaqliFX6bmwtg) for indirect rates. Unlike indirect rates, the rates for Direct Labor and Fringe Benefits are treated as estimates; a grant recipient can invoice at higher rates as long as it is only invoicing for ***actual*** expenditures it has made. The hourly or monthly rates provided shall be unloaded (before fringe benefits or indirect costs).
5. The information provided in these forms will ***not*** be kept confidential.
6. All reimbursable expenditures must be expended within the approved term of the grant agreement. Expenditures may be counted as match share only after CEC notifies the Applicant that its project has been proposed for an award through the release of a Notice of Proposed Awards (NOPA). However, match expenditures incurred after release of the NOPA but prior to the execution of a grant agreement are made solely at the Applicant’s own risk.
7. Applicants must budget for the expenses of a Kick-off Meeting, at least two (2) Critical Project Review meetings, and a Final meeting. Meetings may be conducted at the CEC or by conference call, as determined by the CAM.
8. Applicants must budget for permits, insurance, etc. CEC will not reimburse expenditures for permitting or insurance. However, these expenditures can be included as match share expenditure.
9. Applicants must budget for the preparation and submission of quarterly progress reports during the term of the agreement, and a Final Report. Instructions for preparing the Final Report will be provided to Applicants that are proposed for funding.
10. The purchase of equipment (defined as items with a unit cost greater than $5,000 and a useful life of greater than one year) with CEC funds will require disposition of purchased equipment at the end of the project. Typically, grant recipients may continue to utilize equipment purchased with CEC funds as long as the use is consistent with the intent of the original agreement. ***There are no disposition requirements for equipment purchased with match share funding.***
11. The Budget must reflect estimates for ***actual*** costs to be incurred during the approved term of the agreement. CEC can only approve and reimburse for actual costs that are properly documented in accordance with the grant agreement terms and conditions.
12. Applicants shall ***NOT*** budget for, and ***CANNOT*** be reimbursed for, more than their actual allowable expenses (i.e., the budget cannot include profit, fees, or markups) under the agreement. Subrecipients (all tiers) are allowed to include up to a maximum total of 10 percent profit, fees, or mark-ups on their own actual allowable expenses less any expenses budgeted to sub-subrecipients (i.e., profit, fees and markups are not allowed on lower tier subrecipient expenses). For example, if a subrecipient has $100,000 in actual allowable costs but has budgeted $20,000 to a sub-subrecipient, then the subrecipient can only include up to 10 percent profit on $80,000 ($100,000 minus $20,000). See terms and conditions for additional restrictions and requirements.
13. ***IMPORTANT - Payment of Prevailing Wage:*** Applicants must read and pay particular attention to the terms and conditions section related to Public Works and payment of Prevailing Wages. Prevailing wage rates can be significantly higher than non-prevailing wage rates. Failure to pay legally required prevailing wage rates can result in substantial damages and financial penalties, termination of the grant agreement, disruption of projects, and other complications.
14. **Resumes**

Applicants must include resumes for key personnel identified in the application. “Key personnel” are individuals that are critical to the project due to their experience, knowledge, and/or capabilities. Resumes are limited to a maximum of 2 pages each.

1. **Contact List**

Applicants must include a completed Contact List (Attachment 6) by including the appropriate points of contact for the Applicant. CEC will complete the CEC points of contact during agreement development.

1. **Operation and Reliability Plan**

Applicants must submit an Operation and Reliability Plan detailing operation and reliability of charging equipment for at least six years after the beginning of operation, to meet the Operation and Reliability requirements described in the Scope of Work (Attachment 2). The Plan should address, but is not limited to, preventive and corrective maintenance, recordkeeping, and reporting. The Plan should describe plans to maximize uptime, including availability of qualified technicians and replacement parts; remote monitoring, diagnostics, updates, and repairs; minimizing response time when an error is detected; proactive and ongoing efforts to ensure interoperability of chargers and vehicles; customer service, including processes for customers to report that a charger is not operational; and site host training, if applicable.

The Operation and Reliability Plan must address maintenance of the charging station pedestals, and all ancillary equipment, including but not limited to any awnings, canopies, shelters, and information display kiosks or signage associated with the charging station.

1. **Letters of Support/Commitment**

Applicants must include appropriate letters of support/commitment. Letters must include sufficient contact information, so CEC is able to efficiently contact and verify the support or commitment. Letters must be limited to 2 pages each.

* 1. **Key Project Partners:** Key project partners, **including a minimum of one participating school district,** identified in the application must provide letters demonstrating their commitment to the proposed project and their ability to fulfill their identified roles.
  2. **Third-party Match Share Contributors (if applicable):** Any third-party match share contributors must identify the amount of match that will be committed to the project, the funding source(s), and state that the match share contributor will provide the identified match funding. Letters of commitment from third party match share contributors must contain a telephone number and email address to allow CEC to contact the match share partner or representative to confirm their authority to commit matching funds to the proposed project.
  3. **Letters of Support (optional):** Applicants are encouraged to submit letter(s) of support that substantiate the estimated demand and/or the potential benefits of the proposed project. Third-party letters of support can be provided by, but are not limited to: air districts, state or federal agencies, local safety officials, potential users of the proposed project, and any other relevant organizations.

1. **CEQA Worksheet (Attachment 7)**

Each proposed project may be subject to California Environmental Quality Act (CEQA) compliance, as well as permitting and other requirements (Ca. Public Resources Code Section §§ 21000 et seq.). All applications must adhere to the requirements specified in this section.

CEQA requires public agencies to identify the significant environmental impacts of their discretionary actions and to avoid or mitigate them, if feasible. Under CEQA, an activity that may cause either a direct or reasonably foreseeable indirect physical change in the environment is generally considered a project. Any project funded under this solicitation may be considered a project under CEQA if it will cause a direct or reasonably foreseeable indirect physical change in the environment. Agencies must comply with CEQA before they discretionally approve a project. For projects that are exempt from CEQA, agencies may prepare and file a Notice of Exemption.

Applicants must complete the detailed CEQA Worksheet and submit it with their application. This worksheet will help Applicants and the CEC determine CEQA compliance obligations by identifying which projects may require more extensive CEQA review. Failure to complete the worksheet may lead to disqualification of the application. In the worksheet, the Applicant shall provide a detailed description of the project and all of its components, as well as any direct physical changes and reasonably foreseeable indirect changes to the surrounding environment.

The Applicant must provide in Attachment 7 the following information as it pertains to the proposed project prior to execution of any agreement:

Proposed Location: The Applicant must provide the specific address or equivalent location information for the proposed project.

Permits: The Applicant must identify the permits necessary for the project in the proposal narrative. If no permits are necessary, then the Applicant must state that in Attachment 7.

Project Impacts: The Applicant must describe the direct physical changes and reasonably foreseeable indirect changes to the surrounding environment that may result from the project, if any. Please see CEQA Worksheet (Attachment 7).

Identify CEQA Lead Agency: The lead agency is the public agency that has the greatest responsibility for carrying out or approving a project and for preparing environmental review documents under CEQA. The lead agency is the public agency that has the greatest responsibility for approving the project as a whole. When issuing grants, CEC is typically a Responsible Agency under CEQA, which means that they must make CEQA findings based on review of the lead agency’s environmental documents approving the physical project subject to funding. While rare, if CEC is the only public agency with discretionary approval authority over the project, then CEC may act as the lead agency and prepare its own environmental documents (based on analysis provided by the Applicant). The lead agency will be identified using the following process:

Where the proposed project would require a discretionary approval from another permitting agency, the Applicant must identify the CEQA lead agency in the application and include documentation demonstrating that contact has been made with the lead agency with jurisdiction over the project for purposes of complying with CEQA. The documentation may be in the form of a letter from the lead agency that is stamped as received by the local agency.

If CEC is the only agency with discretionary approval over the proposed project, then CEC will act as the lead agency and will work with the Applicant to satisfy CEQA requirements.

Regardless of which agency is the lead agency for a proposed project, the Applicant shall be responsible for all costs associated with preparation of environmental review documents. The Applicant may also be required to retain a consultant to perform environmental studies as appropriate.

Projects recommended for funding must complete the CEQA process by December 1, 2023. The CEC reserves the right to cancel proposed awards that do not meet this CEQA compliance deadline and recommend funding for the next highest-scoring passing proposal submitted under this solicitation.

Applicants are encouraged to provide documentation of communication with the local lead agency, if one exists (e.g., a county or city). Documentation such as a completed notice of exemption, a letter from the local agency acknowledging its role in the CEQA process, or a permit application to the lead agency that is stamped as received. If no CEQA review would be required by the local lead agency, provide documentation (e.g. a letter or e-mail) from the local agency explaining why CEQA review is not required.

Prior to approval of a proposed award, the CEC must comply with CEQA. To comply with CEQA, the CEC must have CEQA-related information from Applicants and sometimes other entities, such as local governments, in a timely manner. Unfortunately, even with this information, the CEC may not be able to complete its CEQA review prior to the encumbrance deadline for every project. For example, if a project requires an Environmental Impact Report, the process to complete it can take many months. For these reasons, it is critical that Applicants organize project applications in a manner that minimizes the time required for the CEC to comply with CEQA and provide all CEQA-related information to the CEC in a timely manner such that the CEC is able to complete its review in time to meet encumbrance deadlines.

1. **Localized Health Impacts Information Form (Attachment 8)**

Applicants must complete and submit a Localized Health Impacts Information Form. CEC requires this information to assist in developing and publishing a localized health impact report.

1. **Past Performance Reference Form(s) (Attachment 10)**

Information provided to address past performance will not count towards the page limitations.

The Applicant should address performance under current or prior agreements using public funding (e.g., contract, grant, or loan), including agreements with the CEC, other public agencies, and those that used Settlement Funds administered by a public agency. This must include all CEC agreements (e.g., contract, grant, or loan) within the last 10 years (if any) and the 5 most recent agreements with other public agencies within the past 10 years (if any). Applicants should indicate whether the projects were successfully completed in a timely manner. Applicants should:

* + - Provide a list of all agreements with the CEC received by the Applicant in the last 10 years (if applicable).
    - Provide a list of the 5 most recent agreements (e.g., contract, grant, or loan) with other public agencies received by the Applicant within the past 10 years (if applicable).
    - Provide references for the agreements received by the Applicant and identified above, to verify the Applicant’s past performance. Each reference must include a contact person name and phone number (or email address). If contacted by CEC staff, references should be able to speak to the Applicant’s ability to successfully complete projects in a timely manner and their performance.

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.
    - Describe the final outcome of the project.

# IV. Evaluation Process and Criteria

## Application Evaluation

Applications will be evaluated and scored based on the responses to the information requested in this solicitation and on any other information available such as past performance of CEC agreements.[[3]](#footnote-4) The entire evaluation process from receipt of applications to posting of the Notice of Proposed Award is confidential.

To evaluate Phase 1 applications, CEC will organize an Evaluation Committee that consists of CEC staff or staff of other California state entities. Applications that are successfully awarded and executed as part of Phase 1 will be eligible to apply for Phase 2. Evaluation criteria for Phase 2 will be provided in the solicitation manual at a later date.

* 1. **Screening Criteria**

The Contracts, Grants and Loans Office will screen applications for compliance with the Administrative Screening Criteria. The Evaluation Committee will screen applications for compliance with the Technical Screening criteria. Applications that fail any of the Administrative or Technical Screening Criteria shall be disqualified and eliminated from further evaluation.

* 1. **Administrative Screening Criteria**

| **ADMINISTRATIVE Screening Criteria**  *The Application must pass ALL administrative screening 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  Fail |
| 1. The Applicant provides the required authorizations and certifications. | Pass  Fail |
| 1. The Applicant has not included a statement that is contrary to the required authorizations and certifications. | Pass  Fail |

* 1. **Technical Screening Criteria**
  2. The Applicant is an eligible Applicant.
  3. The project is an eligible project, based on project requirements.
  4. The project meets the minimum match share requirement.
  5. The Applicant passes the past performance screening criterion.
  6. **Applicant’s Past Performance Screening Criterion (Pass/Fail)**

An Applicant may be disqualified under this solicitation due to severe performance issues under one or more prior or active CEC agreement(s) within the last 10 years. An Applicant is defined as at least one of the following: the business, principal investigator, or lead individual acting on behalf of themselves—received funds from the CEC (e.g., contract, grant, or loan) and entered into an agreement(s) with the CEC. Any Applicant that does not have an active or prior agreement equates to no severe performance issues and therefore would pass this screening criteria.

Severe performance issuesare characterized by significant negative outcomes under an agreement and may include:

* + - * Agreement was terminated with cause.
      * CEC filed litigation against the Applicant.
      * Severe audit findings are not resolved to CEC’s satisfaction. Severe audit findings may include but are not limited to: incomplete or unsatisfactory deliverables; grant funds used inappropriately (i.e., other than as represented); or questioned costs.
      * Project objectives were not met and were caused by factors that are, or should have been, within the Applicant’s control.
      * Significant delays in project completion resulting in delayed benefits for California. Project completion delays of one year or more from the originally proposed project schedule and caused by factors within the Applicant’s control may be considered significant.
      * Deliverables were not submitted to the CEC or were of poor quality. For example, Applicant delivered poorly written reports that required significant rework by staff prior to acceptance or publication.
      * Demonstrated and documented poor or delayed communication when significant issues or setbacks were experienced that materially and negatively impacted the project. For example, delays in informing the CEC when the Applicant experienced loss of a key project partner or site control may be considered significant.
  1. **Grounds to Reject an Application or Cancel an Award**

In addition to the Screening Criteria identified within this solicitation, CEC reserves the right to reject an application and/or cancel an award for reasons including, but not limited to the following:

1. The application contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Applicant.
2. The application is intended to erroneously and fallaciously mislead the State in its evaluation of the application and the attribute, condition, or capability is a requirement of this solicitation.
3. The application does not comply or contains caveats that conflict with the solicitation and the variation or deviation is material or it is otherwise non-responsive.
   1. **Technical Evaluation**

Applications passing all screening criteria and are not rejected as described above will be submitted to the Evaluation Committee to review and score based on the Evaluation Criteria in this solicitation.

The Evaluation Committee reserves the right to schedule a clarification interview with an Applicant that will either be held by telephone or in person at CEC for the purpose of clarification and verification of information provided in the application. However, these interviews may not be used to change or add to the contents of the original application. Applicants will not be reimbursed for time spent answering clarifying questions.

The total score for each application will be the average of the combined scores of all Evaluation Committee members. A minimum score of 70 percent overall (70 points), and a minimum score of 70 percent (21 points) on Criteria a.: Project Implementation are both required for the application to be eligible for funding.

CEC will recommend awards to the highest ranked projects (according to total score) until available funding under this solicitation has been exhausted.

## Notice of Proposed Awards

The results of the evaluation will be posted in a Notice of Proposed Awards (NOPA) and will include (1) the total proposed funding amount; (2) the rank order of Applicants; and (3) the amount of each proposed award. CEC will publish the NOPA on the CEC’s website.

## Debriefings

Applicants that are not proposed for funding may request a debriefing after the release of the NOPA by emailing the CAO listed in Part I. A request for debriefing should be received no later than 15 days after the NOPA is released.

## Scoring Scale

Using this Scoring Scale, the Evaluation Committee will give a score for each criterion described in the Evaluation Criteria.

|  |  |  |
| --- | --- | --- |
| **% of Possible Points** | **Interpretation** | **Explanation for Percentage Points** |
| 0% | Not Responsive | Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable. |
| 10-30% | Minimally Responsive | Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable. |
| 40-60% | Inadequate | Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution. |
| 70% | Adequate | Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable. |
| 75% | Between Adequate and Good | Response better than adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable. |
| 80% | Good | Response fully addresses the requirements being scored with a good degree of confidence in the Applicant’s response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable. |
| 85% | Between Good and Excellent | Response fully addresses the requirements being scored with a better than good degree of confidence in the Applicant’s response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable. |
| 90% | Excellent | Response fully addresses the requirements being scored with a high degree of confidence in the Applicant’s response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations. |
| 95% | Between Excellent and Exceptional | Response fully addresses the requirements being scored with a better than excellent degree of confidence in the Applicant’s response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations. |
| 100% | Exceptional | All requirements are addressed with the highest degree of confidence in the Applicant’s response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution. |

## Evaluation Criteria

|  |  |
| --- | --- |
| **Criterion** | **Possible Points** |
| **a. Project Implementation:**  Applications will be evaluated on the degree to which:   1. The proposed project locations will benefit California, **at least one school district,** and grid reliability. 2. Grid benefits of bi-directional charging and grid integration are needed at the proposed locations. 3. The proposed project is capable of providing support to the grid during grid emergencies, such as automated response to Flex Alerts and participation in demand response programs such as the Emergency Load Reduction Program or the Demand Side Grid Support Program. 4. The project contains integration, enrollment, and managed charging with time-varying electricity rates such as time of use rates, EV rates (including those supporting export), or dynamic rates. Project descriptions for charger management strategies optimize automation of charging during low-price periods while ensuring vehicles are ready for transport when needed. 5. The proposed locations are in low-income communities, disadvantaged communities, have high percentages of free and reduced-price lunch program use, are in grid constrained areas, are in tier 2 or 3 fire risk districts, or otherwise demonstrate a need for bi-directional charging. 6. Equipment to be deployed is appropriate for the proposed project and leads to the successful deployment of bi-directional charging infrastructure for electric school buses and demonstration of the benefits for school districts. 7. The proposed project demonstrates how bi-directional chargers and electric school buses will provide power to local loads during grid outages and site integration and engineering will accommodate islanded bi-directional charger operation. 8. The proposed equipment is commercially available. 9. The project team will work with electrical utility providers to ensure sufficient local grid capacity to support bi-directional charging and electric school buses, coordinate with electrical utility providers to ensure timely interconnection of bi-directional chargers, and bi-directional chargers will be used for grid export or simply for local load reductions. 10. The proposed project will lead to understanding utility and district requirements for grid integration. 11. The project team has demonstrated its ability to accomplish required government certification and verification protocols, such as infrastructure construction permits, and licenses to operate. 12. The proposed project will comply with the relevant codes and standards, including but not limited to:     1. UL 1741     2. ISO 15118-20     3. Open Charge Point Protocol 13. The Applicant has demonstrated a plan to maintain and operate the electric school buses and infrastructure throughout and beyond the term of the agreement, as required in the Scope of Work. 14. The proposed project will successfully lead to future VGI for other school districts and similar fleets. 15. The proposed project will maximize the dissemination of data, results, and lessons for knowledge transfer.   ***Note: Applications must obtain a minimum score of 21 points within this evaluation criterion to be eligible for funding.*** | 30  (Applications must achieve a 70% score on this criterion to be eligible for funding.) |
| **b. Project Readiness**  Applications will be evaluated on the degree to which:   1. The Scope of Work and dates in the Project Schedule are complete and demonstrate a clear path to successful implementation of the proposed project. 2. Site control is secured for the proposed sites. 3. Commitment from school districts, technology providers, and utilities is secured. 4. Required permitting for the proposed project has been completed or the permitting schedule ensures successful project completion within the timeframes specified in this solicitation. 5. The proposed project has achieved compliance under CEQA or can be completed within the timeframes specified in this solicitation. | 15 |
| **c. Project Benefits**  Applications will be evaluated on the degree to which:   1. The proposed project will support grid reliability and customer savings. Detailed and realistic plans for integration and participation in the Emergency Load Reduction Program, the Demand Side Grid Support Program, other demand response, EV rates, dynamic rates, and/or other strategies and programs supporting grid reliability and customer savings are provided. 2. The proposed project will maximize kWh storage capacity. 3. The number of electric school buses involved will maximize electricity supply when exporting electricity. 4. The proposed equipment will be able to provide power, if necessary, when the grid is unavailable. 5. The proposed project will benefit communities, including emission reductions, public health, economic, and cost-saving benefits. 6. The proposed project will benefit the distribution grid and support reliability. Benefits may include, but are not limited to:    * + - 1. Reducing load, particularly as a demand response resource during net peak hours (4 pm – 9 pm).          2. Safely exporting power to the grid.          3. Reducing local grid congestion. 7. The proposed project will be capable of handling general daily or weekly grid condition net peaks. 8. The proposed project will be capable of handling emergency situations such as flex alerts and extreme annual conditions. | 15 |
| **d. Team Experience and Qualifications**  Applications will be evaluated on the degree to which:   1. The project team’s qualifications are suitable to the tasks described in the proposed Scope of Work. 2. The project team demonstrates the ability to establish and adhere to realistic and expeditious timelines. 3. The project team has verifiable experience and knowledge related to the following: 4. Installation of high-quality bi-directional charging infrastructure projects. 5. Understanding of current UL and SAE standards relevant to this project. 6. Working with school districts, utilities, and charging infrastructure providers. 7. California-specific needs and opportunities related to permitting and other requirements. 8. Conducting outreach and education about bi-directional charging infrastructure projects, and how to get such projects completed. 9. Collecting project data from subrecipients. 10. Bringing project-related benefits to Priority Populations. 11. Knowledge of industry entities that are likely to participate in bi-directional charging infrastructure projects. 12. Working with small businesses, rural communities, community-based organizations, community leaders, Native American tribes, low-income communities, and disadvantaged communities. 13. Collection, management, maintenance, and reporting on large amounts of data. 14. The technology providers are established and have records supporting their products. 15. The Applicant and project team have demonstrated exceptional administrative and technical performance under existing or prior funding agreements (CEC and/or other public agencies), if the Applicant worked on such projects, including: 16. Adherence to schedule and due dates. 17. Effective and timely issue resolution. 18. Quality of deliverables. 19. Objectives of past projects have been attained. 20. Honest, timely, and professional communication with staff from the funding entity. 21. Effective coordination with project partners, subrecipients, and other stakeholders. 22. Timely and accurate invoicing. | 10 |
|  |  |
| **e. Project Budget**  Applications will be evaluated on the degree to which:   1. The proposed project budget is cost-effective and appropriate to the purpose of this solicitation. 2. Administrative and overhead expenses are minimized. 3. State funds are necessary for the proposed project. 4. The source, type, and amount of Match Share funds are described, documented, and committed to the proposed project. | 10 |
| **f.** Operation and Reliability Plan  Applications will be evaluated on the degree to which:   1. The project will maximize uptime. 2. Operation and reliability, as described in the Operation and Reliability Plan, exceeds the solicitation’s minimum standards as set in the Scope of Work. 3. The Operation and Reliability Plan demonstrates availability of qualified technicians and replacement parts. Remote monitoring, diagnostics, updates, and repairs will effectively measure and reduce downtime. 4. The Applicant effectively addresses interoperability of chargers and vehicles. 5. Customer service and site host training support awareness of and prompt attention to chargers that are not operational. | 10 |
| **g. Innovation**  Applications will be evaluated on the degree to which:   1. The project is innovative and fits the specific locations, use case, and utility. 2. The project addresses limited power distribution capacity and/or mitigates negative grid impacts. 3. The project demonstrates the ability to improve resiliency of California’s grid and response to extreme weather events and other emergencies. 4. The project includes innovative approaches to operations for enhanced customer experience, providing innovative business models or technologies, and methods to reduce operations and maintenance costs. | 10 |
| **Total Possible Points** | 100 |
| **Minimum Passing Score (70%)** | 70 |

## Tie Breakers

If the score for two or more applications are tied, the application with a higher score in the Project Benefits criterion will be ranked higher. If still tied, an objective tiebreaker (such as a random drawing) will be utilized.

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# V. Administration

## Definition of Key Words

Important definitions for this solicitation are presented below:

|  |  |
| --- | --- |
| **Word/Term** | **Definition** |
| Applicant | Respondent to this solicitation |
| Application | Formal written response to this document from Applicant |
| CAM | Commission Agreement Manager |
| CAO | Commission Agreement Officer |
| CARB | California Air Resources Board |
| CBO | Community Based Organization |
| CEC | California Energy Commission |
| DER | Distributed Energy Resource |
| Disadvantaged Communities (DACs) | Disadvantaged communities are census tracts that score within the top 25th percentile of California Environmental Protection Agency (CalEPA) CalEnviroScreen 4.0 scores. <https://oehha.ca.gov/calenviroscreen/sb535> |
| GAAP | Generally Accepted Accounting Principles |
| Low Income Communities | Low-income communities are census tracts with median household incomes at or below 80 percent of the statewide median income or with household incomes at or below the threshold designated as low income by the Department of Housing and Community Development’s list of state income limits adopted pursuant to Section 50093 of the California Health and Safety Code, State and Federal Income, Rent, and Loan/Value Limits. https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits |
| Priority Populations | Residents of (1) census tracts identified as disadvantaged by California Environmental Protection Agency per SB 535, (2) census tracts identified as low-income per AB 1550, or (3) a low-income household per AB 1550. |
| Solicitation | Grant Funding Opportunity, which refers to this entire solicitation document and all its attachments and exhibits |
| State | State of California |
| Tribal Lands | Lands located in the State of California that are tribally owned lands, buildings, or facilities |
| US EPA | United States Environmental Protection Agency |
| VGI | Vehicle-grid Integration |

## Cost of Developing Application

The Applicant is responsible for the cost of developing an application, and this cost cannot be charged to the State.

## Confidential Information

CEC will not accept or retain any applications that have any portion marked confidential.

## Solicitation Cancellation and Amendments

It is CEC’s policy not to solicit applications unless there is a bona fide intention to award an agreement. However, if it is in the State’s best interest, CEC reserves the right, in addition to any other rights it has, to do any of the following:

* Cancel this solicitation;
* Revise the amount of funds available under this solicitation;
* Amend this solicitation as needed; and/or
* Reject any or all applications received in response to this solicitation.

If the solicitation is amended, CEC will post an addendum on CEC’s solicitation information website at https://www.energy.ca.gov/funding-opportunities/solicitations.

## Errors

If an Applicant discovers any ambiguity, conflict, discrepancy, omission, or other error in the solicitation at any time prior to 5:00 p.m. of the application deadline date, the Applicant shall immediately notify CEC of the error in writing and request modification or clarification of the solicitation. The CEC will provide modifications or clarifications by written notice to all entities that requested the solicitation. The CEC shall not be responsible for failure to correct errors.

## Modifying or Withdrawal of Application

An Applicant may, by email to the CAO, withdraw or modify a submitted application before the deadline to submit applications. Applications cannot be changed after that date and time. An application cannot be “timed” to expire on a specific date. For example, a statement such as the following is non-responsive to the solicitation: “This application and the cost estimate are valid for 60 days.”

## Immaterial Defect

The CEC may waive any immaterial defect or deviation contained in an application. The CEC’s waiver shall in no way modify the application or excuse an Applicant proposed for funding from full compliance with solicitation requirements.

## Disposition of Applicant’s Documents

The entire evaluation process from receipt of applications up to the posting of the Notice of Proposed Award is confidential. On the Notice of Proposed Award posting date, or date of solicitation cancellation, all applications and related material submitted in response to this solicitation become a part of the property of the State and public record. Applicants who want any work examples they submitted with their applications returned to them shall make this request and provide either sufficient postage or a Courier Charge Code to fund the cost of returning the examples.

## Applicants’ Admonishment

This solicitation contains the instructions governing the requirements for a firm quotation to be submitted by interested Applicants, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Applicant responsibilities. Applicants are responsible for carefully reading the entire solicitation, asking appropriate questions in a timely manner, submitting all required responses in a complete manner by the required date and time, and making sure that all procedures and requirements of the solicitation are followed and appropriately addressed.

## Agreement Requirements

The content of this solicitation shall be incorporated by reference into the final agreement. See the sample agreement terms and conditions included in this solicitation.

The CEC reserves the right to negotiate with Applicants to modify the project scope, the level of funding, or both. If CEC is unable to successfully negotiate and execute a funding agreement with an Applicant, CEC, at its sole discretion, reserves the right to cancel the pending award and fund the next highest ranked eligible project.

CEC must formally approve all proposed grant awards. Clean Transportation Program agreements for over $75,000 must be scheduled and considered at a CEC Business Meeting for approval by the CEC.

Public agencies that receive funding under this solicitation must provide an authorizing resolution approved by their governing authority to enter into an agreement with CEC and designating an authorized representative to sign.

CEC will send the approved agreement, including the general terms and conditions and any additional terms and conditions, to the grant recipient for review, approval, and signature. Once the grant recipient signs, CEC will fully execute the agreement. Recipients are approved to begin the project only after full execution of the agreement.

## No Agreement Until Signed and Approved

No agreement between CEC and an Applicant is in effect until the agreement is approved at a CEC Business Meeting and signed by both the grant recipient and the CEC. CEC reserves the right to modify the award documents prior to executing the agreement.

1. <https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits>  [↑](#footnote-ref-2)
2. <https://oehha.ca.gov/calenviroscreen/sb535> [↑](#footnote-ref-3)
3. The Past Performance Evaluation is available on the CEC website at: https://www.energy.ca.gov/media/6595 [↑](#footnote-ref-4)