



# **GFO-23-605 Pre-Application Workshop**

Zero Emission School Bus Charging and Fueling Infrastructure Block Grant

Fuels and Transportation Division  
November 28, 2023 | 09:00 a.m.



# Workshop Agenda

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



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# Housekeeping

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- Workshop is recorded on Zoom
- [Grant Funding Opportunity Webpage:](https://www.energy.ca.gov/solicitations/2023-11/gfo-23-605-zero-emission-school-bus-charging-and-fueling-infrastructure-block)  
<https://www.energy.ca.gov/solicitations/2023-11/gfo-23-605-zero-emission-school-bus-charging-and-fueling-infrastructure-block>
- Virtual Participation via Zoom or telephone during the Q&A period
- Written Questions to Commission Agreement Officer:  
Laura Williams, email: [Laura.Williams@energy.ca.gov](mailto:Laura.Williams@energy.ca.gov)  
Subject: GFO-23-605  
Q&A Deadline: Thursday, November 30, 2023



# Commitment to Diversity

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

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

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



# Diversity Survey

Diversity Survey - ZE School Bus  
Charging & Fueling Infrastructure  
Block Grant



Scan the code on a phone  
or tablet with a QR reader  
to access the survey.

## One Minute Survey

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

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

Survey will be closed at the end of the day.

**Survey Link:** <https://forms.office.com/Pages/ResponsePage.aspx?id=RBI6rPQT9k6NG7qicUgZTtQ-G7GrbGJFmZJPv38ckjJURVpONUNNVzczN1JKTVpTTTZHTkZSV1FJSy4u>



# Find Partners on EmpowerInnovation.net

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

**[www.empowerinnovation.net](http://www.empowerinnovation.net)**

## **FIND A PARTNER**

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

## **RESOURCES & TOOLS**

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



# Clean Transportation Program

- Established in 2007 by Assembly Bill 118 (2007)
- Extended to July 1, 2035, by Assembly Bill 126 (2023)
- Provides approximately \$95 million of funding per year through 2023
- Investment Plan determines funding allocations across various categories
- Supports workforce training and development

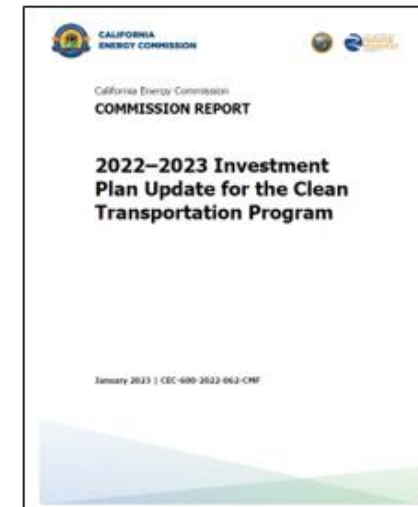


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# Policy Drivers

- 2022-2023 Investment Plan Update for the Clean Transportation Program
- Assembly Bill 114 Committee on Budget and Fiscal Review
- Draft Guiding Principles SB 114 Funded Charging and Refueling Infrastructure Program







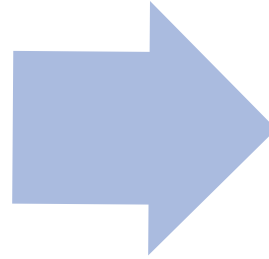
# Solicitation Overview

Zero-Emission School Bus Charging and Fueling Infrastructure Block Grant



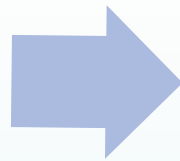
# Solicitation Process

Solicitation  
Release  
**November 9,  
2023**



Applications Due  
**January 4,  
2024**

Notice of  
Proposed Awards  
**February 2024**



CEC Business  
Meeting  
**Q2 2024**



Project Start  
**Q2 2024**



# Purpose of Solicitation

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- Competitive grant solicitation
- To seek a block grant Recipient to design and implement an incentive program for California local educational agencies (LEAs) for zero-emission school bus infrastructure projects
- Incentive program will prioritize zero-emission school bus infrastructure awards but if an LEA can demonstrate a zero-emission vehicle is not feasible, a renewable fueling infrastructure may be funded



# Goals of the Solicitation

- Launch an incentive program by May 2024 upon award;
- Support the state's commitment to the transition of zero-emission school buses by providing funding for supporting infrastructure;
- Ensure LEAs are aware of available funding and can quickly and easily access funding;
- Reduce energy equity gaps and invest in underserved communities by prioritizing small and rural school districts or those that serve a high percentage of unduplicated pupils; and
- Prioritize grantees purchasing zero-emission school buses with bidirectional charging where available.



# Available Funding

Type of Funding	Funding Amount
Incentive Funding	\$125,000,000*
Administration Funding (capped at 4% of incentive funding)	\$5,000,000**

If future funds are approved:

\*\$250,000,000 in additional incentive funding will become available

\*\*\$10,000,000 in additional administrative funding will become available



# Applications and Award

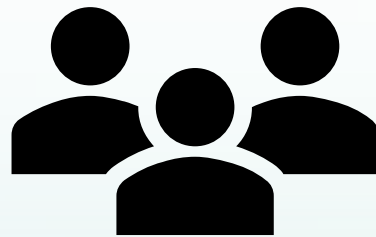
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- Applicants may submit one application.
- Up to 4% of incentive funds are available for administrative costs.
- The CEC will screen and score applications.
- The projects with the highest overall ranking and at least the minimum passing score will be recommended for funding.



# Eligible Applicants

- All public and not-for profit technology entities with a physical office in California.
- Applicants must accept the Terms and Conditions, without negotiation.
- Applicants are required to register with the California Secretary of State and be in good standing to enter into an agreement with the CEC.





# Project Requirements

Block Grant Recipient must:

- Design an incentive project that can be launched no later than May 2024
- Adhere to the Staff Draft <https://efiling.energy.ca.gov/GetDocument.aspx?tn=253066&DocumentContentId=88269> and Final Guiding Principles of the Senate Bill (SB) 114 Funded Charging and Fueling Infrastructure Program. Final document will be posted on the Program webpage <https://www.energy.ca.gov/programs-and-topics/programs/zero-emission-school-bus-and-infrastructure-program>
- Design a single, streamlined application on a user-friendly portal in coordination with CARB's third-party implementer







# Project Requirements (Continued)

Block Grant Recipient must develop:

- An Implementation Manual
- A list of entities that can provide technical assistance to grant applicants
- Grant agreements with awarded LEAs
- An outreach and program awareness plan
- Key performance indicators (KPIs) and a user-friendly, internal access database(s)
- Public access webpages
- A plan to implement internal control processes and documentation standards



# Project Requirements (Continued)

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Block Grant Recipient must:

- Conduct outreach in accordance with the approved outreach and program awareness plan
- Conduct an annual technical advisory workshop
- Collect and submit data on individual incentive recipients



# Project Requirements (Continued)

Block Grant Recipient must establish project processes and procedures to:

- Identify conflicts of interest with potential incentive project Applicants
- Handle personal information in accordance with the CEC's Special Terms and Conditions (Attachment 10)
- Ensure incentive requests are submitted to the CEC for payment and processing within 30 calendar days of receipt
- Establish, maintain, and submit incentive project records to the CEC
- Establish separate accounts to separately accept, track, disburse and report on funding from sources other than the CEC



# Eligible Project Costs

- Cost must be for the development and implementation of a block grant designed to provide incentives for zero-emission school bus charging and fueling infrastructure projects
- Administrative costs are capped at 4% of incentive funding
- Future incentive and administrative funds may become available in future fiscal years



# Match Funding

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- No match funding is required for this solicitation.



# Application Components

Zero Emission School Bus Charging and Fueling  
Infrastructure Block Grant



# Application Organization (p. 22)

Item	Action Needed by Applicant
Project Narrative	Create document
Scope of Work (Attachment 1)	Complete the attachment
Schedule of Products and Due Dates (Attachment 3)	Complete the attachment
Proposal Budget (Attachment 4)	Complete the attachment
Resumes	Upload document
Contact List (Attachment 5)	Complete the attachment
Letters of Support/Commitment	N/A
CEQA Worksheet (Attachment 6)	Complete the attachment
Localized Health Impacts Information Form (Attachment 7)	Complete the attachment
Past Performance Reference Form(s) (Attachment 8)	Complete the attachment(s)
Applicant Declaration (Attachment 9)	Upload document
<i>Scope of Work Instructions (Attachment 2)</i>	<i>None</i>



# General Application Information

- With the new ECAMS application process, Applicants will input application information directly into the web platform
- Sign up at: <https://ecams.energy.ca.gov/s/login/>

The screenshot shows the login page for the Energy Commission Agreement Management System. At the top, there is a navigation bar with the CA.GOV logo and social media icons. Below this is the California Energy Commission logo. The main heading is "Energy Commission Agreement Management System". The login form consists of two input fields: "Username" and "Password". Below the fields is a blue "Log in" button. At the bottom of the form, there are two links: "Forgot your password?" and "New User Sign Up?".





# Project Narrative

- **Applicants must submit a project narrative**
- Limited to 20 pages
- Use 11-point font, single-spaced and a blank line between paragraphs
- Include page numbers
- **Project Narrative must address each scoring criterion described in the Evaluation Criteria (pp. 39- 41)**

## b. **Team Resources, Qualifications, and Experience**

- 1) Describe the team's experience related to transportation-related projects and administering incentive projects. Applicants should emphasize experience related to school bus and/or medium- and heavy-duty (MDHD) zero-emission vehicle (ZEV) fueling infrastructure and related innovative deployment approaches. Applicants should also discuss team

## E. **EVALUATION CRITERIA**

Criterion	Possible Points
<b>1. Team Resources, Qualifications, and Experience</b> Applications will be evaluated on the degree to which: <ul style="list-style-type: none"><li>• The proposed team's qualifications are suitable to the tasks described in the proposed scope of work.</li></ul>	30



# Table of Contents

- The Project Narrative must include a Table of Contents.
- Table of Contents will not count towards the 20-page limit.

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# Scope of Work (Attachment 1)

- Applicants must complete Attachment 1.
- Describe exactly what the project will do.
- Identify what will be delivered to the CEC.
- Be sure to include in the technical tasks:
  - At least one product deliverable per task.

Rev. 07/2023

**Attachment 1  
Exhibit A  
SCOPE OF WORK**

**TECHNICAL TASK LIST**

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

Task #	CPR	Task Name
1		Administration
2		Block Grant Internal Controls, Processes, and Procedures
3		Website Design, Development, Maintenance, and Implementation
4	X	Overall Project Plan Development
5	X	Incentive Project Development
6	X	Incentive Project Implementation
7		Operations and Reliability
8		Semi-Annual Electric Vehicle Charger Inventory Reports
9		Data Collection & Analysis
10		Project Fact Sheet
<Etc.>		<Insert Task Name>

**KEY NAME LIST**

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

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

**GLOSSARY**

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

November 2023

Page 1 of 27  
Attachment 1 - Scope of Work

GFO-23-605  
Zero-Emission School Bus  
Charging and Fueling Infrastructure Block Grant



# Schedule of Products and Due Dates (Attachment 3)

- Applicants must complete Attachment 3.
- Add tasks and product deliverables that correspond to the Scope of Work.
- Provide realistic dates on when product deliverables can be completed.

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



# Proposal Budget (ECAMS Entry)

- **OPTION 1**
- Applicants enter budget information directly into ECAMS for Prime Applicant ONLY and upload Excel Attachment 4 for both Prime and Major Subrecipient(s)
- Identify how CEC funds will be spent to complete the project
- For more information on the CEC budget forms, visit the [CEC ECAMS Resources](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) webpage at: <https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources>

Details Attachments Past Agreements Budget Summary **Direct Labor** Fringe Benefits Travel Equipment Materials & Miscellaneous More

Direct Labor Hourly (0)

JOB CLASSIFICATION	LABOR RATE (\$ PER HOUR)	# OF HOURS	RATE X HOURS	CEC SHARE VALUE	MATCH SHARE VALUE	TOTAL
No data returned						

Direct Labor Monthly (0)

JOB CLASSIFICATION	LABOR RATE (\$ PER MONTH)	# OF MONTHS	RATE X MONTHS	CEC SHARE VALUE	MATCH SHARE VALUE	TOTAL
No data returned						

Direct Labor - Hourly

Job Classification  Highest Estimated Labor Rate (\$ per hour)  # of Hours

\* CEC Share Value  \* Match Share Value

Include Indirect Cost  Include Profit

Add more Direct Labor



# Proposal Budget (Attachment 4)

- **OPTION 2**
- Upload all budgets (Prime and Major Subrecipients) as MS Excel attachments
- Follow Budget Instructions
- Identify how CEC funds and match funds will be spent to complete the project
- For more information on the CEC budget forms, visit the [CEC ECAMS Resources](https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources) webpage at: <https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources>

PROPOSAL BUDGET			
Category Budget			
Agreement Number	GFO-21-603		
Name of Organization	Organization Name		
Select Recipient or Subrecipient			
Select your company's California Business Certifications			
Cost Category	CEC Share	Match Share	Total
Direct Labor	\$ -	\$ -	\$ -
Fringe Benefits	\$ -	\$ -	\$ -
<b>Total Labor</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
Travel	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ -
Materials/Miscellaneous	\$ -	\$ -	\$ -
Subrecipients/Vendors	\$ -	\$ -	\$ -
<b>Total Other Direct Costs</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
Indirect Costs	\$ -	\$ -	\$ -
Profit (not allowed for grant recipients)	\$ -	\$ -	\$ -
<b>Total Indirect and Profit</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<i>Grand Totals</i>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<i>Total LEL Reimbursable Funds Spent in California or Paid to California-Based Entities (if applicable)</i>	\$ -		
<i>Percentage of CEC Reimbursable Funds Spent in California or Paid to California-Based Entities</i>			



# Resumes

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

## FIRST LASTNAME

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

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

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

## WORK EXPERIENCE

### Construction Worker

**NewCompany** January 2018 to Present

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

### Crew Lead

**CompanyCo, Inc** July 2017 to December 2017

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

## EDUCATION

### High school or equivalent

**Ged Program** - NewCity, NC  
April 2015 to February 2016



# Contact List (Attachment 5)

- Applicants must complete Attachment 5.
- Include the appropriate points of contact under the Recipient column.
- The CEC will complete the CEC points of contact during agreement development.

**Attachment 06  
CONTACT LIST**

**Please complete the information in the "Recipient" column.**

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

Attachment 06 Page 1 of 1 GFO-21-603  
REACH





# CEQA Worksheet (Attachment 6)

- Applicants must submit a completed Attachment 6.
- The CEC requires this information to assist with our CEQA determinations.

## ATTACHMENT 6

### CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) WORKSHEET

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

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

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

#### 1. What are the physical aspects of the project? (Check all that apply and provide brief

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

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



# Local Health Impacts Information Form (Attachment 7)

- Applicants must complete Attachment 7.
- The CEC requires this information for a Localized Health Impacts report.

## Attachment 7

### Local Health Impacts Information

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

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

#### INSTRUCTIONS

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

#### PROJECT NAME

#### APPLICANT'S NAME AND ORGANIZATION

#### PROJECT SITE(S) DESCRIPTION

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

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

#### DEMOGRAPHIC DATA

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

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



# Past Performance Reference Form (Attachment 8)

- Applicants must complete Attachment 8 to provide references for:
  - Agreements with the CEC received by the Applicant in the last 10 years.
  - The five most recent agreements with other public agencies received by the Applicant within the past 10 years.
- References must include a contact person name and phone number or email address. These persons may be contacted by CEC staff.
- Applicants should fill out a separate Past Performance Reference Form for each agreement reference.

Attachment 08  
GFO-23-605  
**PAST PERFORMANCE REFERENCE FORM**

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

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

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

<b>Name of Organization</b>	
<b>Address</b>	
<b>Contact Name</b>	
<b>Contact Title</b>	
<b>Contact Phone Number (or Email)</b>	
<b>Title of Project</b>	
<b>Agreement Number or Other Unique Identifier</b>	
<b>(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.</b>	
<b>Describe any severe audit findings and how they were ultimately addressed and resolved.</b>	

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Zero-Emission School Bus Charging and  
Fuelling Infrastructure Block Grant



# Application Evaluation

Zero Emission School Bus Charging and Fueling  
Infrastructure Block Grant



# How Will My Application Be Evaluated?

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## Stage One: Application Screening

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

## Stage Two: Application Evaluation

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



# Administrative Screening Criteria

Criteria	Pass/Fail
1. The application is received by the due date and time specified in the “Key Activities Schedule” in Section I of this solicitation.	Pass or Fail
2. The Applicant has not included a statement that is contrary to the required authorizations and certifications when submitting in ECAMS.	Pass or Fail



# Technical Screening Criteria

Criteria	Pass/Fail
1. The applicant is an eligible applicant.	Pass or Fail
2. The project is an eligible project.	Pass or Fail
3. The applicant passes the past performance criterion.	Pass or Fail



# Past Performance Screening

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1. An applicant may be disqualified due to **severe performance issues** characterized by significant negative outcomes under one or more prior or active CEC agreement(s) within the last 10 years.
2. Any applicant that does not have an active or prior agreement equates to no severe performance issues and therefore would pass this screening criteria.





# Application Technical Evaluation and Scoring

- The Evaluation Committee applies a scoring scale to the evaluation criteria.
- Applications must obtain a minimum passing score of **70%** or **70 points** to be considered for funding.
- Review Section IV of the solicitation manual and ensure the application provides a clear and complete response to all scoring criteria.



# Application Evaluation and Scoring

Scoring Criteria	Possible Points
1. Team Resources, Qualification, and Experience	30
2. Implementation and Technical Readiness	30
3. Budget	20
4. Innovation	20
<b>Total Possible Points</b>	<b>100</b>
<b>Minimum Points to Pass (70%)</b>	<b>70</b>



# Team Resources, Qualification, and Experience

Applications will be evaluated on the degree to which:

- The proposed team's qualifications are suitable to the tasks described in the proposed scope of work.
- The Applicant demonstrates ability to establish and adhere to realistic and aggressive timelines.
- The proposed team has verifiable experience and knowledge related to the following:
  - Implementation of high quality and cost-effective incentive projects.
  - School bus and MDHD ZEV fueling infrastructure markets (including trends and needs).
  - Collection, management and reporting on large amounts of data including providing accurate real-time data.
  - Outreach to potential LEA applicants.
  - Accounting for and handling large amounts of funding.
  - Excellent and timely customer service.
  - Soliciting and obtaining funding from a variety of sources.
  - Linkages to innovative approaches to infrastructure deployment and experience in renewable energy sources, storage, demand response, managed charging, on-site generation, distributed energy, use of infrastructure to increase energy resiliency, etc.



# Team Resources, Qualification, and Experience Cont.

Applications will be evaluated on the degree to which:

- The Applicant and 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:
  - Adherence to schedule and due dates.
  - Effective and timely issue resolution.
  - Quality of deliverables.
  - Objectives of past projects have been attained.
  - Honest, timely, and professional communication with staff from the funding entity.
  - Effective coordination with project partners, subcontractors, and other stakeholders.
  - Timely and accurate invoicing.



# Implementation and Technical Readiness

Applications will be evaluated on the degree to which:

- The Applicant will meet the expedited project timeline in accordance with a May 2024 launch date.
- The proposed approach to development and implementation of incentive projects is comprehensive, high-quality, effective, realistic, and timely and will maximize project performance.
- The proposed approach to collect, track and report on data is comprehensive, timely and transparent.
- Internal controls are adequate to minimize errors and instances of fraud, waste, and abuse.
- The Applicant demonstrates ability to properly account for (using Generally Accepted Accounting Principles), track and administer large amounts of funding.
- The Applicant demonstrates ability to manage, oversee, and account for multiple, simultaneous incentive projects.
- The proposed approach will maximize adherence to incentive project requirements.



# Implementation and Technical Readiness (Cont'd)

Applications will be evaluated on the degree to which:

- The proposed approach will identify and resolve problems in a timely manner.
- The proposed approach will mitigate actual or perceived conflicts of interest to ensure potential incentive project Applicants do not receive preferential treatment.
- The proposed approach will ensure that incentive requests are submitted to the CEC within 30 calendar days upon receipt of a valid incentive payment request.
- The Applicant demonstrates the ability to ensure that expenditures will be cost-effective and maximize benefits for each dollar spent from reimbursable funds.
- The team has the ability to collect and analyze feedback from incentive recipients to increase effectiveness of future incentive projects.
- The Applicant will prioritize infrastructure awards that support the replacement of the oldest internal combustion buses in the state as well as grantees that are small and rural school districts, serve a high percentage of unduplicated pupils, or will purchase zero-emission school buses with bidirectional charging where available.



# Budget

Applications will be evaluated on the degree to which:

- Administrative costs are reasonable to ensure the successful implementation of the incentive projects.
- Administrative costs are minimized.
- Efficiencies and economies of scale related to incentive project size are maximized.
- Risks and contingencies are identified and addressed through the proposed approach.



# Innovation

Applications will be evaluated on the degree to which:

- The proposed approach incorporates unique, innovative, and cost-effective approaches that will enhance successful implementation of incentive projects.
- The response to the hypothetical project assignment is:
  - Comprehensive.
  - Reasonable.
  - Justified.





# Terms and Conditions

Zero-Emission School Bus Charging and Fueling Infrastructure Block Grant



# Terms and Conditions

- Terms and Conditions
  - Can be found on the Funding Resources webpage at <https://www.energy.ca.gov/funding-opportunities/funding-resources>
  - Appendix 1 reflects the terms and conditions that have been updated through the CEC's ECAMS process
    - E.g. backup documentation required for invoicing
- Special T&Cs (Attachment 10)
- More information is on the ECAMS Resources webpage at <https://www.energy.ca.gov/funding-opportunities/funding-resources/ecams-resources>



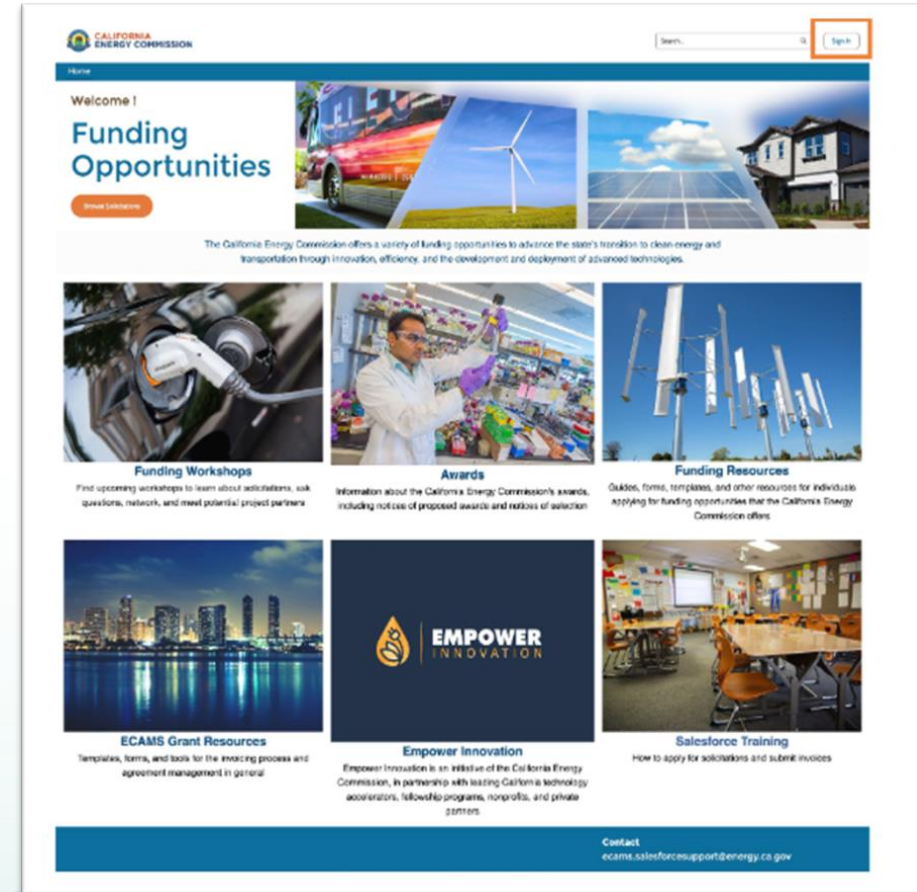
# Application Submittal

Zero-Emission School Bus Charging and Fueling Infrastructure Block Grant



# GFO Submission Requirements

- Applications will be submitted through the Energy Commission Agreement Management System (ECAMS), available at: <https://ecams.energy.ca.gov/>
- **Applicants must have or create a user account in order to apply for this solicitation.** To create an account, please see the guidance document titled [User Registration Instructions](#)
- Note: One account manager per organization, but users can be added by account manager





# GFO Submission Requirements, Cont.

- Electronic files, other than those requiring signatures, must be in the format that they are provided in the solicitation.
- Application documents should meet formatting requirements, and page recommendations provided in the solicitation manual.
- Attachments requiring signatures may be scanned and submitted in PDF format.
- Until further notice, any requirement in CEC solicitations to provide a signature is waived. In ECAMS, checking the "I Agree" box and clicking the "I Agree & Submit" button provides the required authorizations and certifications.
  - Notice on CEC's waiver of the signature requirement appears here:  
<https://www.energy.ca.gov/funding-opportunities/solicitations>



# GFO Submission Resources

- For detailed instructions on how to submit an application, please see the [Applying for a Solicitation](#) guidance document
- Guidance documents are available at <https://www.energy.ca.gov/funding-opportunities/funding-resources> under *General Funding Information*
- Questions about the ECAMS system can be sent to:  
[ECAMS.SalesforceSupport@Energy.ca.gov](mailto:ECAMS.SalesforceSupport@Energy.ca.gov)

A screenshot of a web page titled "General Funding Information" with a close button (X) in the top right corner. The page is divided into two main sections. The first section is "GRANT SOLICITATION SYSTEM (GSS) INFORMATION" with two bullet points: "Grant Solicitation System (GSS) Login" and "How to Apply - PDF". The second section is "ENERGY COMMISSION AGREEMENT MANAGEMENT SYSTEM (ECAMS)" with three bullet points: "Energy Commission Agreement Management System (ECAMS) Login", "User Registration - PDF", and "Applying for a Solicitation". This second section is highlighted with a red rectangular border.



# GFO Submission

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## Submit applications early!

ECAMS will stop accepting application documents promptly at the deadline of 11:59 p.m. on January 4, 2024.

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



# Key Dates

Activity	Action Date
Solicitation Release	<b>November 09, 2023</b>
Pre-Application Workshop	<b>November 28, 2023</b>
<b>Deadline for Written Questions</b>	<b>November 30, 2023</b>
Anticipated Distribution of Question/Answers	Week of Dec. 11, 2023
<b>Deadline to Submit Applications by 11:59 p.m.</b>	<b>January 4, 2024</b>
Anticipated Notice of Proposed Awards Posting	February 2024
Anticipated Energy Commission Business Meeting	April 2024





# Question and Answers

## Three ways to ask questions:

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

### 1. Use the raise hand function in Zoom

Zoom Phone Controls:

- \*6 – Toggle mute/unmute
- \*9 – Raise hand

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

### 3. Submit written questions

Send written questions to [Laura.Williams@energy.ca.gov](mailto:Laura.Williams@energy.ca.gov)

Deadline: November 30, 2023

Note that an official CEC response will be provided in writing and posted on the GFO webpage the week of December 11, 2023.



# Written Questions

Please send all questions related to GFO-23-605 to:

**Laura Williams**

Commission Agreement Officer

715 P Street, MS-1

Sacramento, CA 95814

(916) 879-1383

[Laura.Williams@energy.ca.gov](mailto:Laura.Williams@energy.ca.gov)

(Please add subject line: GFO-23-605)

**Deadline to submit questions: Thursday, November 30, 2023**

**Deadline to submit applications: Thursday, January 04, 2024, 11:59 p.m. PST**



# Next Steps

Activity	Action Date
Deadline for Written Questions	November 30, 2023
Anticipated Distribution of Question/Answers	Week of December 11, 2023
<b>Deadline to Submit Applications by 11:59 p.m.</b>	<b>January 04, 2024</b>
Anticipated Notice of Proposed Awards Posting	February 2024

Updates to solicitation documents will be posted on the [GFO Webpage](https://www.energy.ca.gov/solicitations/2023-11/gfo-23-605-zero-emission-school-bus-charging-and-fueling-infrastructure-block):  
<https://www.energy.ca.gov/solicitations/2023-11/gfo-23-605-zero-emission-school-bus-charging-and-fueling-infrastructure-block>



# Thank You!

Applications are due January 4, 2024, by 11:59 p.m.