

DOCKETED

Docket Number:	21-TRAN-04
Project Title:	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)
TN #:	267737
Document Title:	EnergIIZE Implementation Manual Q3 2025
Description:	EnergIIZE Commercial Vehicles Project Implementation Manual for Q3 2025. Effective from October 15, 2025.
Filer:	CALSTART
Organization:	CALSTART
Submitter Role:	Other Interested Person
Submission Date:	11/25/2025 9:02:43 AM
Docketed Date:	11/25/2025



Implementation Manual for Energy Infrastructure Incentives for Zero-Emission (EnergiZE) Commercial Vehicles Project

Effective October 15, 2025

This Implementation Manual is a living document, and changes will occur over time as the project evolves.



DISCLAIMER

This report was prepared as the result of work sponsored by the California Energy Commission (CEC). It does not necessarily represent the views of the CEC, its employees, or the State of California. The CEC, the State of California, its employees, contractors, and subcontractors make no warrant, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the uses of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the CEC, nor has the CEC passed upon the accuracy or adequacy of the information in this report.



Summary of Revisions Q4 2025

- Eligible Costs – [Section 3, Eligibility](#)
 - Added MCS charging equipment for the MCS funding lane.
 - Removed stub-outs from the eligible cost list, effective Q4 2025.
- Modification to Funding Lanes – [Section 4, Incentive Structure](#)
 - Added the Megawatt Charging System (MCS) funding lane.
 - Removed the EV Jump Start funding lane.
- Vehicles Supported Requirements - [Section 5, EnergIIZE Award Process](#)
 - Added requirement for Step 1 to identify the anticipated number of vehicles to be supported by the infrastructure project within three months of project commissioning.
- Project Step Requirements – [Section 5, EnergIIZE Award Process](#)
 - Updated requirements for Steps 2, 3, and 4. Project step updates are also listed in [Appendix D](#).
- Data Collection – [Section 6, Duties and Responsibilities](#)
 - Clarified requirements and duration of data collection.



Table of Contents

1	Vision and Mission Statements	6
2	Introduction and Overview	6
3	Eligibility	7
3.1	Participant Eligibility	7
3.2	Approved Project Partners	9
3.3	Infrastructure Eligibility	9
3.4	Eligible Project Costs	11
3.5	Approved Product List – EV Chargers	14
4	Incentive Structure	16
4.1	Incentive Offerings	17
4.2	Maximum Awards	17
4.2.1	Set-Asides Exclusive Benefits	18
5	EnergIIZE Award Process	19
5.1	Step 1: Submit Application	19
5.1.1	Application Scoring and Conditional Award	20
5.2	Step 2: Provide Supporting Documentation	22
5.3	Step 3: Permitting and Construction	22
5.4	Step 4: Commission Project	23
6	Duties and Responsibilities	24
6.1	EnergIIZE Incentive Recipient Responsibilities	24
6.1.1	Legal Responsibilities	24
6.1.2	Project Management Responsibilities	24
6.2	Incentive Recipient Performance Review	25
6.3	EnergIIZE Project Partner Responsibilities	26
6.3.1	Requirements for All Project Partners	26
6.3.2	Additional Requirements for Installation Partners	27
6.4	Contract Provisions	29
6.4.1	Terms and Conditions	29
6.4.2	EVTP, DIR, and Insurance Compliance Affidavit	29
6.4.3	Price and Current Market Rates - Equipment Verification Email	30
6.4.4	Payment Requests	30



6.4.5	Project Eligible Costs Invoicing.....	30
6.4.6	Invoice Package	31
6.4.7	Incentive Recipient Reimbursement.....	32
6.5	Data Collection Requirements.....	32
6.6	Confidentiality	35
	List of Acronyms and Abbreviations.....	36
	Key Terms	38
	Appendix A – EVITP, DIR, and Insurance Compliance Affidavit.....	43
	Appendix B – Project Partner Pre-Approval Risk Assessment.....	44
	Appendix C – Equity Certification Form.....	47
	Appendix D – Summary of Project Step Requirements	50
	Appendix E – Extension Request and Cancellation Policy.....	52
	Appendix F – EnerGIIZE Incentive Recipient Terms and Conditions	59
	Appendix G – Site Verification Form	70
	Appendix H – Authority Having Jurisdiction Permitting Checklist	71
	Appendix I – Application for Confidential Designation	75
	Appendix J – Equipment Verification Email Template	78
	Appendix K – Hydrogen Fueling Station Critical Milestones	79



1 Vision and Mission Statements

The Energy Infrastructure Incentives for Zero-Emission (EnergIIZE) Commercial Vehicles Project is a block grant designed to rapidly deploy funds to support the increase in deployment of zero-emission vehicle (ZEV) infrastructure in the state of California to meet statewide climate and clean transportation goals. This multi-year project will provide the funding for electric vehicle (EV) charging and hydrogen fueling infrastructure needed to support the transition of old, polluting medium- and heavy-duty (MDHD) vehicles and equipment to zero-emission.

In April 2021, the California Energy Commission (CEC) awarded Clean Transportation Program funding to CALSTART to design and implement a zero-emission vehicle infrastructure incentive project for MDHD vehicles. In March 2022, the CEC and CALSTART launched the EnergIIZE Commercial Vehicles block grant to provide financial incentives for MDHD ZEV infrastructure, including equipment, network, and software costs. CALSTART implements EnergIIZE and Tetra Tech supports the application and incentive processing.

EnergIIZE has the funding authority for up to \$544 million, which was approved at the December 2021 and April 2024 CEC business meetings. Of that amount, EnergIIZE currently has access to up to \$276 million. CEC may increase or decrease funding levels at its discretion.

Any additional funds, up to the remaining \$268 million, must be formally approved by the CEC before being added to EnergIIZE. Each year, the CEC considers and/or allocates additional funding to CALSTART to advance EnergIIZE's mission. As of February 2025, EnergIIZE has awarded over \$200 million to over 250 projects statewide for ZEV MDHD charging and fueling infrastructure.

2 Introduction and Overview

EnergIIZE Commercial Vehicles is part of a statewide effort to increase market demand for MDHD ZEVs. As the nation's first commercial fleet infrastructure incentive project, EnergIIZE offers reimbursement-style grants to help offset the costs of deploying ZEV infrastructure for both on-road and off-road MDHD battery electric and hydrogen fuel cell vehicles and equipment. EnergIIZE eligible costs include equipment, software, warranty, and maintenance (see [Section 3.4, Eligible Project Costs](#)).

This Implementation Manual (IM) identifies the minimum requirements for receiving incentives from the EnergIIZE Project. EnergIIZE incentives are for the construction of public, private, or shared EV



charging or hydrogen fueling stations that serve MDHD fleets for the following purposes:

- Business
- Nonprofit
- Transit
- School
- Government

EnergIIZE incentives must support infrastructure projects that will serve zero-emission MDHD vehicles in operation immediately or within three (3) months of project commissioning. Projects will be asked to identify the quantity of vehicles to be supported at time of application submittal and throughout the project process.

Generally, EnergIIZE may be combined, or stacked, with other funding sources, such as federal, local, and utility funding programs (see [Section 4.1, Incentive Offerings](#)). Incentive Recipients utilizing multiple funding sources must demonstrate a clear separation of EnergIIZE eligible costs.

EnergIIZE staff and the CEC are committed to inclusion, diversity, equity, and access, ensuring that all Californians have an opportunity to participate in and benefit from programs and services. EnergIIZE's project design embraces this approach and implements it through eligibility requirements, technical assistance opportunities, as well as its maintenance of a streamlined participation process. EnergIIZE aims to provide at least 60 percent of project funds to infrastructure located in disadvantaged communities (DACs) and low-income communities (LICs). Furthermore, in accordance with Assembly Bill 126 (2023), at least 50 percent of EnergIIZE funds used in the deployment of hydrogen ZEV infrastructure projects shall directly benefit or serve residents of low-income communities and disadvantaged communities as defined by CalEnviroScreen 4.0 (see [Key Terms](#)).

3 Eligibility

This section describes the eligibility criteria for participation in EnergIIZE and the types of ZEV infrastructure costs eligible for incentive funding.

3.1 [Participant Eligibility](#)

Applicants are required to be one of the following:

- 1) An entity responsible for the operation of MDHD ZEV(s) (Class 2b or above) in the State of



California that will own and operate infrastructure to support their MDHD vehicle(s), or

- 2) An entity responsible for the engineering, construction, procurement, or management of EV charging or hydrogen fueling stations that serve MDHD fleets in the State of California that shall service MDHD ZEV(s) (Class 2b or above).

An Applicant may be a commercial fleet vehicle operator applying on behalf of their organization, a site owner, authorized lessee, an authorized representative of an infrastructure site, or an EnergIIZE Approved Project Partner. The Applicant attests that they are the responsible party and will remain so from planning through the end of the six year operation requirement.

An Approved Project Partner may apply on behalf of an Applicant who meets one of the two eligibility criteria above as the filing representative. Refer to [Section 3.2, Approved Project Partners](#) for more information.

The Incentive Recipient is the entity to whom incentives shall be disbursed. The Incentive Recipient is identified by their unique Taxpayer Identification Number (TIN) and must incur all project costs under the TIN listed on their application and on their W-9 to be eligible for reimbursement. Changes to the Incentive Recipient TIN are **not allowed** after application submittal. In most cases, the Incentive Recipient of EnergIIZE incentives should be the Applicant and primary contact. Please see [Key Terms](#) for definitions of each term. The EnergIIZE team reserves the right to interview Applicants and Incentive Recipients to determine whether Incentive Recipients are distinct or if one parent organization is benefiting from multiple applications submitted by their subsidiaries.

Participation in EnergIIZE requires the Incentive Recipient to be registered with the State of California and have a valid assigned TIN. The TIN is required to be in good standing according to the California Business Search provided by the California Secretary of State¹. Utilities, municipalities, and other government agencies may be subject to additional eligibility review for participation in EnergIIZE.

Multiple applications for unique project sites under the same Incentive Recipient TIN will be reviewed on a case-by-case basis. Incentive Recipients, as identified by the Incentive Recipient TIN, may NOT be awarded more than 25 percent of total available funding. Additionally, no Incentive Recipient may have more than a cumulative total of 50 active applications/projects open across CEC-funded block grants

¹ See: <https://bizfileonline.sos.ca.gov/search/business>



and solicitations.

EnergIIZE looks for Applicants that serve the project mission of awarding at least 60 percent of project funds to infrastructure located in DACs and LICs. Applicants that propose projects in DAC and LICs as shown in the [Priority Populations Map](#) and/or where the lead Applicant is a small business, minority owned business, tribal entity, non-profit, public transit, or public school district are encouraged to designate their project through submission of the Equity Certification Form (see [Appendix C](#)).

3.2 [Approved Project Partners](#)

EnergIIZE Project Partners fall under two categories: Application Partners and Installation Partners. Please see [Key Terms](#) for detailed definitions of each role and see www.energiize.org/partners for information on Project Partners, eligibility, and how to become an approved EnergIIZE Project Partner. The EnergIIZE project team encourages Charging as a Service (CaaS) and project development providers to apply for the Project Partner role.

Application Partners:

It is the responsibility of the Application Partner to apply on behalf of the Applicant in accordance with all Applicant eligibilities and this IM. Furthermore, if the project is conditionally awarded, the Application Partner shares the Incentive Recipient responsibilities outlined in this IM (See [Section 6, Duties and Responsibilities](#)).

Installation Partners:

It is the responsibility of the Installation Partner to install or deploy ZEV infrastructure in accordance with this IM. Installation Partners may also apply on behalf of the Applicant and when applying on behalf of the Applicant, it must be in accordance with all Applicant eligibilities and this IM. Furthermore, if the project is conditionally awarded, the Installation Partner shares the Incentive Recipient responsibilities outlined in this IM (see [Section 6, Duties and Responsibilities](#)).

3.3 [Infrastructure Eligibility](#)

All EnergIIZE ZEV infrastructure deployment projects must:

- 1) Be new equipment installed for the first time.
- 2) For EV chargers and hydrogen dispensers, have a product warranty that lasts at least the length of the EnergIIZE operational period (six years from commissioning).



- 3) Conform to the **most recent version** of the following:
- a. California Code of Regulations (CCR) Title 4: Business Regulations, Division 9 Measurement Standards, Chapter 1 Tolerances and Specifications for Commercial Weighing and Measuring Devices, Article 1 National Uniformity, Exceptions and Additions, Sections 4001 and 4002. Additional Requirement, Subsection 4002.9, Hydrogen Gas-Measuring Devices (3.39). See the [California Type Evaluation Program \(CTEP\) webpage](#) for details.
 - b. CCR Title 4: Business Regulations, Division 9 Measurement Standards, Chapter 6 Automotive Products Specifications, Article 8 Specifications for Hydrogen Used in Internal Combustion Engines and Fuel Cells, Sections 4180 and 4181.
 - c. CCR Title 24: California Building Code, Part 2, Volume I, Chapter 11B, Accessibility to Public Buildings, Public Accommodations, Commercial Buildings and Public Housing.
 - d. Business and Professions Code: Division 5 Weights and Measures. See the [California Type Evaluation Program \(CTEP\) webpage](#) for details.
 - e. National Fire Protection Association (NFPA) 70, electric code, and any other relevant codes or standards imposed by the Planning Department or Authority Having Jurisdiction.
- 4) California Health and Safety Code Section 25510(a).
- 5) If the infrastructure and equipment to be installed supports EV charging, comply with all Electric Vehicle Infrastructure Training Program (EVITP) requirements listed in Assembly Bill (AB) 841 (2020). For EVITP details, reference Section 4, [Bill Text - AB-841 Energy: transportation electrification: energy efficiency programs: School Energy Efficiency Stimulus Program.](#)

Site address changes are not allowed after submission of the application unless a clear demonstration of reasonable accommodation and necessity can be proven and is approved by the EnergIIZE project team. If an Applicant wishes to change sites, they must inform the EnergIIZE project team before the Step 2 deadline. **Failure to inform the EnergIIZE project team of a project site address change request may result in project cancellation.**



3.4 Eligible Project Costs

EnergIIZE eligible costs must include at least one new EV charger port or hydrogen dispenser per conditional award. Other eligible costs include hardware related to electrical and mechanical project needs, software, warranty, and maintenance. Eligible project costs are broken into four categories of qualifying expenses: 1) Equipment, 2) Software, 3) Maintenance, and 4) Warranty. To receive reimbursement for eligible project costs, all submitted project costs must support the deployment of ZEV infrastructure for MDHD ZEV vehicles (Class 2b or above), must support the charger ports or dispensers listed at the time of application, must be incurred after the conditional award date, and must be deemed necessary for the ZEV infrastructure's operation by the EnergIIZE project team. Eligible costs are further detailed below for EV and hydrogen projects. Off-road applications will be reviewed on a case-by-case basis.

Labor and soft costs are eligible for reimbursement exclusively for applications under the EV Jump Start lane, available from 2022 to 2024. Labor and soft costs are ineligible under all other funding lanes. Costs associated with the construction of an infrastructure site that do not go directly toward the purchase of equipment are considered soft costs. The soft costs eligible for incentives under the EV Jump Start lane are limited to the following categories:

- 1) Labor costs related to construction paid in accordance with DIR-determined coverage.
- 2) Design fees for infrastructure planning.

Labor and soft costs are not eligible costs under all other circumstances and must be itemized clearly for invoice processing.

Stub-outs for future charging and fueling equipment are not eligible for reimbursement for projects awarded after Q4 2025.

Permitting and legal fees are not eligible for reimbursement under EnergIIZE.

EV Project Eligible Project Costs include but are not limited to:

- 1) **Equipment**
 - a) Electric vehicle supply equipment (EVSE) (see [Section 3.5, Approved Product List – EV Chargers](#)), including Level 2, direct current (DC), and inductive charging systems
 - b) Equipment capable of Vehicle to Grid (V2G) bidirectional charging



- c) Transformers
- d) Switchgear, meter mains, and circuit breaker panels
- e) Cables/wires
- f) Conduit
- g) Charger accessories
- h) Utility service upgrades (e.g., amperage upgrades to infrastructure site)
- i) Shipping for eligible equipment
- j) Taxes on eligible equipment

2) Software

- a) One-time network costs: Networked or "SMART" EVSEs are required. EnergIIZE provides incentives for the required initial network costs.
- b) Fleet management software
- c) Demand management software
- d) Monthly service fees are not eligible for incentives through EnergIIZE.

3) Maintenance

- a) One-time maintenance plan costs for eligible EVSE for the duration of the EnergIIZE operational period.

4) Warranty

- a) One-time warranty costs for eligible EVSE for the duration of the EnergIIZE operational period.

Hydrogen Project Eligible Project Costs include but are not limited to:

1) Equipment

- a) Dispenser with hose and nozzles
- b) Hydrogen storage
- c) Compressors
- d) Liquid and gaseous hydrogen pumps
- e) Point-of-sale systems
- f) Piping and pipelines
- g) Enclosures
- h) Electrolyzers



- i) Chillers
- j) Power supply unit for electrolyzer
- k) Water treatment system
- l) Control and monitoring system for electrolyzer
- m) Pressure regulators and relief valves
- n) Cool system for compressor
- o) Pressure sensors and flow meters
- p) Overall station control system
- q) Emergency Shut Down (ESD) system
- r) Fire detection and suppression systems
- s) Ventilation system components
- t) Transformers
- u) Switchgear, meter mains, and circuit breaker panels
- v) Utility service upgrades (e.g., amperage upgrades to infrastructure site)
- w) Shipping for eligible equipment
- x) Taxes on eligible equipment

2) Software

- a) One-time network costs. EnergIIIZE provides incentives for the required initial network costs.
- b) Fleet management software
- c) Demand management software
- d) Monthly service fees are not eligible for incentives through EnergIIIZE.

3) Maintenance

- a) One-time maintenance plan costs for eligible hydrogen fueling equipment for the duration of the EnergIIIZE operational period.

4) Warranty

- a) One-time warranty costs for eligible hydrogen fueling equipment for the duration of the EnergIIIZE operational period.

The foregoing lists of eligible and ineligible project costs are neither exhaustive nor comprehensive. CALSTART and the CEC retain the right to determine the eligibility of costs, with the authority to



declare any cost as ineligible at any time pursuant to applicable laws and regulations.

EnergIIZE eligible costs are required to reflect current market prices. EnergIIZE reserves the right to request additional supporting documentation and/or an explanation for eligible costs that are not commensurate with industry custom and practice (see [Section 6.4.3, Price and Current Market Rates - Equipment Verification Email](#)).

3.5 Approved Product List – EV Chargers

EV charger selection plays a crucial role in aligning a ZEV infrastructure deployment project with success. For EV chargers using conductive connectors, only Level 2 and DC chargers are eligible for EnergIIZE funding. Innovative technologies, such as Megawatt Charging Systems (MCS), inductive charging systems, and bidirectional chargers are also permitted.

All EnergIIZE-funded EV chargers must meet certain safety and technical requirements. EV chargers meeting these requirements may be found on the [EnergIIZE Approved Product List \(APL\)](#), [Southern California Edison \(SCE\) APL](#), and [Electric Power Research Institute \(EPRI\) Vetted Product List \(VPL\)](#).

EV chargers funded through EnergIIZE must meet the following requirements:

- 1) **Must be safety certified** by a Nationally Recognized Testing Laboratory (NRTL) recognized by the United States Occupational Safety and Health Administration (OSHA). OSHA's complete list of NRTLs can be found at <https://www.osha.gov/nationally-recognized-testing-laboratory-program>.
- 2) **Must include a standard charging connector or interface.**
- 3) EV chargers shall utilize charging connectors and charging interfaces that are compatible for use with MDHD vehicles sold by multiple original automotive equipment manufacturers for widespread use across California and North America. Such interfaces shall include SAE J1772/Combined Charging System (CCS1), SAE J3105, and SAE J3271/Megawatt Charging System.
- 4) Should the Applicant want to utilize a non-compliant interface, this must be part of a dual port EV charger where one connector of the dual output shall be a compliant interface. Compliant interfaces shall include SAE J1772/Combined Charging System (CCS1), SAE J3105, and SAE J3271/Megawatt Charging System.



- 5) **Must be certified for Open Charge Point Protocol (OCPP) compliance.** All EV chargers must be certified for OCPP 1.6 or newer with Core/Subset and Security Certificates.² Beginning January 1, 2025, EV chargers must be certified for OCPP 2.0.1 or newer with Core/Subset and Security Certificates.
- 6) **Must be International Organization for Standardization (ISO) 15118 ready.** All EV chargers with a SAE J1772/CCS1 or SAE J3400 North American Charging System connector must be ISO 15118 ready. ISO 15118 ready chargers are equipped with onboard hardware that enable high-level communication with the vehicle using ISO 15118. An ISO 15118 ready charger is capable of, at minimum:
- a. Powerline carrier (PLC) based high-level communication as specified in ISO 15118-3.
 - b. Secure management and storage of keys and certificates.
 - c. Transport Layer Security (TLS) version 1.2; additional support for TLS 1.3 or subsequent versions is recommended to prepare for future updates to the ISO 15118 standard.
 - d. Remotely receiving updates to activate or enable ISO 15118 use cases.
 - e. Connecting to a backend network.
 - f. Selecting the appropriate communication protocol used by the vehicle.³
- 7) **Other requirements:**
- a. Bidirectional EV chargers must be ISO 15118-20 ready. An ISO 15118-20 ready charger includes all the capabilities of an ISO 15118 ready charger, as defined above, and additionally supports TLS 1.3, ISO 15118-20 keys and certificates, and receiving remote updates to activate or enable ISO 15118-20 use cases.⁴
 - b. EV chargers and parking facilities must include proper regulatory signs.
 - i. Please visit the Federal Highway Administration’s website for more information:
<https://mutcd.fhwa.dot.gov/resources/policy/rsevcpfmemo/>.

² For more information, please see: <https://openchargealliance.org/certificationocpp/>.

³ For more information, please see: <https://www.energy.ca.gov/data-reports/reports/electric-vehicle-charging-infrastructure-assessment-ab-2127>.

⁴ For more information, please see: <https://www.energy.ca.gov/programs-and-topics/programs/vehicle-grid-integration-program>.



- ii. In addition, please see the California Department of Transportation guidance on signage for EVs: <https://dot.ca.gov/programs/safety-programs/ev-signs>.
- iii. See California Building Codes, section 11B-812.1 for Americans with Disabilities Act (ADA) accessibility standards.

4 Incentive Structure

EnergIIZE Standard Funding

EnergIIZE standard funding is open to eligible infrastructure projects for EV charging or hydrogen fueling. The project may be public, private, or shared.

Beginning in May 2025, EnergIIZE offers funding on a per charging port and per hydrogen dispenser basis for eligible costs for the respective technologies. The move to a per charging port and per hydrogen dispenser funding limit allows alignment with other state grant programs, optimized tracking, and capitalizing on the knowledge of infrastructure deployment to lower project costs resulting in a higher value per public dollar spent. EnergIIZE incentives will be paid on a per port and per dispenser basis with a capped incentive amount per end point.

EnergIIZE Drayage and Transit Funding

EnergIIZE has set aside funding additional to the funds available for standard incentives and is designated for EV charging and hydrogen fueling infrastructure for zero-emission drayage and transit vehicles. EnergIIZE Drayage and Transit Set-Aside funding provides the opportunity to pair infrastructure funding with vehicle incentives, such as those awarded through the California Air Resources Board's (CARB) Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) Drayage Truck Set-Aside and Transit Set-Aside. Projects may be public, private, or shared. Drayage and Transit funding uses the standard charging port and hydrogen dispenser incentive structure but has adjusted maximum award per project. See the EnergIIZE website (<https://www.energiize.org/>) and HVIP website (<https://californiahvip.org/>) for additional details.

EnergIIZE Megawatt Charging System (MCS) Funding

EnergIIZE has allocated Drayage Set-Aside funding specifically for infrastructure projects using the Megawatt Charging System (MCS). Projects may be public, private, or shared. MCS funding uses the



standard charging port incentive structure but has an adjusted maximum award per project.

4.1 Incentive Offerings

EnergIIZE provides incentives for equipment, software, warranty, and maintenance (see [Section 3.4, Eligible Project Costs](#)) up to the described maximum award (see Table 1). When EnergIIZE was established, evaluation criteria were developed with equity as its primary focus to give underserved and disadvantaged entities a jump start in gaining access to ZEV technologies. Therefore, projects meeting one or more of the conditions mentioned in the EnergIIZE equity criteria (see [Appendix C, Equity Certification Form](#)), may be eligible for additional funding, up to 25 percent per port or dispenser (see Table 1).

EnergIIZE funds may be used in conjunction, or stacked, with sources of outside funding such as local or air district funds, grants, and/or private investments, but they **may not be stacked with other CEC funds** for the same project (see [Section 3.1, Participant Eligibility](#)). Under no circumstances may the total incentive, grant, or Incentive Recipient funds from combined sources exceed the total project cost. Similarly, funding for an item or piece of equipment from combined sources cannot be greater than 100 percent of total item cost. Incentive contributions must remain separate from all other funding sources for accounting purposes. Furthermore, a project may not receive incentives from EnergIIZE in excess of the maximum award (see Table 1).

4.2 Maximum Awards

EnergIIZE awards funding on a per charging port or per hydrogen dispenser amount. For EV infrastructure, the amount per charging port is aligned with the power rating of the port. See Table 1 for standard incentive structure amounts.

Table 1: Standard Incentive Structure

Infrastructure Type	Maximum Per Charger Port/ Hydrogen Dispenser Incentive Amount	Equity Per Charger Port/ Hydrogen Dispenser Incentive Amount (+25%)	Maximum Award Per Project
≤50kW EV Port	\$25,000	\$31,250	\$3M (\$3.75M if equity)



51kW - 150kW EV Port	\$75,000	\$93,750	
151kW - 350kW EV Port	\$150,000	\$187,500	
≥351kW EV Port	\$300,000	\$375,000	
MCS EV Port (MCS Lane Only)	\$450,000	No change	\$2.5M
Hydrogen Dispenser	\$2,000,000	\$2,500,000	\$4M (\$5M if equity)

Note that incentives may cover up to but not more than 100 percent of per item costs.

Incentive Project Example

For example, an Applicant may demonstrate that a project is eligible for EV infrastructure funding. The eligible costs listed in the Site Equipment Manifest in the application total \$630,000. They list two 180kW-rated charging ports and two 40kW-rated charging ports. The Incentive Recipient would be eligible for an incentive of up to \$300,000 based on the 180kW-rated ports, as well as an incentive of up to \$50,000 based on the 40kW rated ports, making them eligible for an incentive up to \$350,000 to apply to any approved eligible costs listed. If the project meets at least one of the EnergIIZE equity criteria, the incentive will increase by 25%, making the Incentive Recipient eligible for an incentive up to \$437,500.

4.2.1 Set-Asides Exclusive Benefits

Drayage and Transit Incentives

EnergIIZE has set aside funding sources for drayage infrastructure. For the purpose of this project, drayage trucks are defined as on-road heavy duty trucks that transport containers and bulk to and from the ports and intermodal railyards as well as many other locations. Applicants who fit the drayage funding category are encouraged to apply under the Drayage Set-Aside as these funds do not have to compete with other trucking fleets. Applicants must have requested incentives through HVIP offered by CARB or a similar program. Per charging port and hydrogen dispenser incentive amounts under the



Drayage Set-Aside are the same as the standard incentive structure's equity incentive amounts, however, maximum awards are \$5 million per project.

Similarly, EnergIIZE has set aside funding sources for public transit agencies. The transit funding is open to Innovative Clean Transit (ICT) compliant transit agencies, California Native American tribes, California tribal organization or non-governmental organization serving tribal entities, and California City or county governments, transportation districts/ transit districts, or public agencies. Applicants who fit the transit funding category are encouraged to apply under the Transit Set-Aside as these funds do not compete with other bus fleets. Applicants must have requested incentives through HVIP offered by CARB or a similar program. Per charging port and hydrogen dispenser incentive amounts under the Transit Set-Aside are the same as the standard incentive structure's equity incentive amounts, however, maximum awards are \$5 million per project.

MCS Incentives

EnergIIZE has set aside funding sources for drayage projects using the Megawatt Charging System. Applicants installing infrastructure that uses the Megawatt Charging System (SAE J3271) are encouraged to apply under the MCS lane as these funds do not have to compete with other non-MCS projects. Incentive amounts under the MCS lane are up to \$450,000 per charging port and maximum awards are \$2.5 million per project.

5 EnergIIZE Award Process

Interested parties will find information about the EnergIIZE process and participation in this incentive project on the [EnergIIZE website \(https://www.energiize.org/\)](https://www.energiize.org/). Resources such as the Funding Lane Fact Sheets, Application Packets, and tools for success can all be accessed online. The [Incentive Processing Center \(IPC\) application portal](https://calstart3.my.site.com/apply/s/) can be found on the EnergIIZE website as well (<https://calstart3.my.site.com/apply/s/>). The following section outlines requirements for initial EnergIIZE funding consideration. A list of general guidelines for document submission for Steps 1 through 4 can be found in [Appendix D](#).

5.1 [Step 1: Submit Application](#)

EnergIIZE only accepts applications online through the [IPC portal \(https://calstart3.my.site.com/apply/s/\)](https://calstart3.my.site.com/apply/s/). Applicants are required to supply basic project information,



verify that they are authorized to install and operate infrastructure at the project site (see [Appendix G, Site Verification Form](#)), confirm communication with the project site's electric utility, confirm communication with the project site's Authority Having Jurisdiction (AHJ), provide relevant contact information, and meet other lane-specific requirements.

The Applicant must demonstrate commitments for MDHD ZEV purchases, leases, or other documentation showing vehicles will be operational within three (3) months of project commissioning. For shared access sites, the Applicant must demonstrate agreements with at least one MDHD fleet or user that will begin utilizing the infrastructure within three (3) months of commissioning. For all site access types (public, shared, and private), Applicants must identify in their application:

- The number of MDHD vehicles expected to utilize the incentivized infrastructure within three (3) months of project commissioning; and
- The basis for these estimates, supported by documentation such as purchase orders, fleet contracts, or signed affidavits.

Refer to the Application Packet(s) on the [EnergiZE website](#) for lane-specific document submittal requirements and key deadlines.

Mixed use (hydrogen and EV) sites must meet EV requirements **and** hydrogen requirements.

If the requirements for Step 1 have been met (see [Appendix D](#)) and the application is selected for an EnergiZE conditional award, then funds shall be reserved consistent with the incentive structure outlined in this IM. All Applicants will be notified of their award status by email within 60 business days of the designated review period start date.

5.1.1 Application Scoring and Conditional Award

EnergiZE uses two types of scoring processes to score and rank projects to determine which projects are awarded funding: competitive and first-come, first-served. Competitive applications demonstrate that the project has elements of project readiness, and the project goals include short timelines in ZEV infrastructure deployment and commissioning. For example, the project may already have an issued building permit or a submitted building permit application. Following the readiness evaluation, applications will be scored. Conditional awards will be made to the highest scoring applications in Tier 1 first, then Tier 2, and lastly Tier 3, based on availability of funding. In the event of tie scores, funding



decisions will be decided by application timestamp with the first to apply being the first awarded.

Table 2: EV Project Readiness Tiers

Priority	Readiness Tier	Documents Provided at Time of Application
Awarded First	Tier 1	Site Verification Form + Final Site Design + Issued Building Permit + Formal Charger Equipment Quote (with supplier estimated lead time)
Awarded Second	Tier 2	Site Verification Form + Final Site Design + Submitted Building Permit Application + Formal Charger Equipment Quote (with supplier estimated lead time) + Authority Having Jurisdiction (AHJ) Permitting Checklist
Awarded Third	Tier 3	Site Verification Form + Preliminary Site Plans + Formal Charger Equipment Quote (with supplier estimated lead time)

Table 3: Hydrogen Project Readiness Tiers

Priority	Readiness Tier	Documents Provided at Time of Application
Awarded First	Tier 1	Site Verification Form + Final Site Design + Issued Building Permit + Formal Hydrogen storage equipment quote (with supplier estimated lead time) + Formal Hydrogen dispenser with anti-freeze lock capabilities quote (with supplier estimated lead time)
Awarded Second	Tier 2	Site Verification Form + Final Site Design + Submitted Building Permit Application + Formal Hydrogen storage equipment quote (with supplier estimated lead time) + Formal Hydrogen dispenser with anti-freeze lock capabilities quote (with supplier estimated lead time)
Awarded Third	Tier 3	Site Verification Form + Preliminary Site Plans + Proof of communication with AHJ + Formal Hydrogen storage equipment quote (with supplier estimated lead time) + Formal Hydrogen dispenser with anti-freeze lock capabilities quote (with supplier estimated lead time)

Once an application review period begins, EnergIIZE staff will review all completed applications.

EnergIIZE staff reserve a grace period to ask clarifying questions via email of Applicants who submit complete applications. If an Applicant is non-responsive (within 15 calendar days), their application may be disqualified. Applicants and Incentive Recipients are deemed non-responsive at the sole discretion



of the EnergIIZE project team. General guidelines for document submission for Steps can be found in [Appendix D](#).

5.2 Step 2: Provide Supporting Documentation

Incentive Recipients will have 90 calendar days to provide the project's supporting documentation of progress in Step 2. Supporting documentation varies by project type but will always include the execution of the Incentive Recipient Terms and Conditions (see [Appendix F, Incentive Recipient Terms and Conditions](#)) and the EVITP, DIR, and Insurance Compliance Affidavit (see [Appendix A, EVITP, DIR, and Insurance Compliance Affidavit](#)).

No equipment changes are allowed after Step 2. In addition, awards are based on the cost estimate given at the time of application. Any costs incurred as a result of changing equipment after the notice of conditional award shall be borne by the Incentive Recipient. Conditional award amounts may decrease if the project scope is reduced (e.g. fewer ports or lower-cost equipment) but will not increase after notice of conditional award. Unused funds cannot be reassigned to reach the maximum award.

General guidelines for document submission for Steps can be found in [Appendix D](#).

5.3 Step 3: Permitting and Construction

Incentive Recipients must submit supporting documentation of construction progress in Step 3. The awarded project must have secured all the necessary permits and satisfied planning department requirements (including ensuring compliance with the California Environmental Quality Act (CEQA) and other applicable federal, local, and California state laws; see [Key Terms](#) for additional resources.

General guidelines for document submission for Steps can be found in [Appendix D](#). Documentation may include, but is not limited to:

- 1) Issued Building Permit
- 2) Construction Timeline
- 3) Utility Confirmation of Site Electrical Capacity
- 4) Final Site Plans (if awarded before April 2025)
- 5) EVSE or Hydrogen Fueling Equipment Purchase Orders



5.4 Step 4: Commission Project

Once a project's construction is complete and proof of power and/or fuel at the site has been confirmed in the previous step, site commissioning should commence. Incentive Recipients must provide documentation as proof of commissioning to receive any remaining incentives for which they may be eligible and close out their project. Projects awarded after April 2025 will be eligible for payment only when Step 4 documentation is submitted and approved. No milestone payments will be made to projects awarded after April 2025. General guidelines for document submission for Steps can be found in [Appendix D](#). Documentation may include, but is not limited to:

- 1) Final Inspection by the Authority Having Jurisdiction (AHJ)
- 2) Copy of third-party network provider communications contract and Internet Protocol (IP) registration completed (required only for EV charging)
- 3) Verification that chargers/dispensers are in working order (one dashboard photo per charger/dispenser)
- 4) Notification of operational and open retail status
- 6) Serial numbers for all chargers and/or dispensers (one close up of serial number + one of charger/dispenser per charger/dispenser)
- 5) Photographic evidence of the site (one wide shot of charging/fueling stations)
- 6) Final Project Summary Sheet
- 7) Proof of Contractor License and EVITP Certification
- 8) Final Site Plans (if awarded after April 2025)

EV charging projects must complete Step 4 requirements within 24 months of their notice of conditional award, and hydrogen fueling projects must complete Step 4 requirements within 36 months of their notice of conditional award. Once all applicable requirements in Step 4 are submitted and approved, a project is deemed fully commissioned. When a site is fully commissioned and complete, payment may be requested (see [Section 6.4.4, Payment Requests](#)). Completed projects must comply with data collection and uptime requirements for six years beyond the completion of the site.



6 Duties and Responsibilities

6.1 EnergIIZE Incentive Recipient Responsibilities

Incentive Recipients are responsible for coordinating the requirements of the project site's participation in EnergIIZE. This includes, but is not limited to, engaging Project Partners, hiring subcontractors, and maintaining the installed equipment.

6.1.1 Legal Responsibilities

- 1) Must comply with all applicable laws, ordinances, regulations, and standards; all federal, state, and local electrical and building codes for construction; and all Americans with Disabilities Act (ADA) accessibility standards.
- 2) Must have secured all required state, local, county, and city permits to build and install eligible infrastructure.
- 3) Must maintain insurance as required by law. If the installed and commissioned infrastructure is damaged, destroyed, or otherwise becomes permanently inoperable due to accident or negligence by the Incentive Recipient or any other party, the Incentive Recipient must notify EnergIIZE staff.
- 4) Incentive Recipient must disclose all sources of public funding used in combination with EnergIIZE funds.

6.1.2 Project Management Responsibilities

- 1) Must provide accurate and complete documentation of all eligible zero-emission (ZE) infrastructure equipment, and other documents where requested. If an EnergIIZE approved Project Partner is included in the project, then the Project Partner may provide the requested documentation on the Incentive Recipient's behalf.
- 2) Must submit quarterly reports to and respond to surveys put forth by EnergIIZE staff throughout the six-year operation term (see [Section 6.5, Data Collection Requirements](#)).
- 3) Must coordinate the compliance of the persons or entities installing EV charging infrastructure and equipment with all California Department of Industrial Relations (DIR) registration requirements and California Public Works requirements (Lab. Code § 1720 et



seq. and 8 CCR 16000 et seq.). The required EVITP, DIR, and Insurance Compliance Affidavit is included in [Appendix A](#). Certified Payroll and/or a DIR number (or DIR exemption) may be requested by the EnergIIZE project team and verified upon receipt.

- 4) Must ensure that pricing for all EnergIIZE eligible costs (see [Section 3.4, Eligible Project Costs](#)) are reasonable and reflect current market rates.
- 5) Must commission the project site and begin operations within timelines that meet industry trends. EV projects must be commissioned and operational **within 24 months of notice of conditional award**. Hydrogen project sites must be commissioned and operational **within 36 months of notice of conditional award**. Extensions may be requested through the EnergIIZE Extension Request portal in the [IPC](#) (<https://calstart3.my.site.com/apply/s/>).
- 6) Must report project delays within 30 calendar days of becoming aware of them to EnergIIZE staff. Failure to do so may result in the delay of reimbursement, reduction of reimbursement, or cancellation of the award entirely. Please see [Appendix E, Extension Request and Cancellation Policy](#) for details on delays, extensions, and cancellations.
- 7) Incentive Recipient and/or Project Partner must be available for follow-up inspection if requested by EnergIIZE staff, the CEC, or a CEC designee.
- 8) Incentive Recipient must ensure EV and/or hydrogen equipment is maintained and operated for a period of no less than six years from the date of final commissioning.

Hydrogen Project Additional Incentive Recipient Responsibilities:

The following describes the additional duties and responsibilities for those pursuing incentive funding for Hydrogen Fuel Cell Electric Vehicle (FCEV) fueling stations:

- 1) Must develop a Hydrogen Safety Plan (HSP) for each proposed hydrogen fueling station.

6.2 [Incentive Recipient Performance Review](#)

EnergIIZE is designed to support the expansion of ZEV charging and hydrogen fueling station deployment throughout the state. To achieve this goal, the EnergIIZE project team selects projects that demonstrate qualities of high performance with a well-designed project plan and defined community benefits. The EnergIIZE project team shall monitor project performance throughout completion of the



project and final payment. Projects that do not align with current standards, codes, laws, regulations, and/or core values may be subject to additional EnergIIZE review, reimbursement delay, and/or cancellation of an award. See [Appendix E](#) for more information.

Elements that may impact project performance review include:

- 1) Letters of Support
- 2) References
- 3) Documented Project Complaints
- 4) Historical or Current Performance Indicators Across Any Grants, Cooperative Agreements, Subawards, Subcontracts, Contracts, Consulting Agreements, or Funding Gifts
- 5) Extension Requests and Performance to Construction Timelines
- 6) Building Permit Expiration
- 7) Risk Assessment (see [Appendix B, Project Partner Pre-Approval Risk Assessment](#))
- 8) Duration in EnergIIZE Project Steps
- 9) Eligible Costs Exceeding Fair Market Price

6.3 EnergIIZE Project Partner Responsibilities

This section describes the role and requirements of an EnergIIZE Approved Project Partner; an entity that provides partnership, in the form of installation, assistance, guidance, and/or consulting, toward the completed deployment of ZEV infrastructure equipment and services for Incentive Recipients.

6.3.1 Requirements for All Project Partners

- 1) Must have a valid IRS-assigned TIN, and if required to register their business with the State of California, the TIN is required to be in good standing according to the California Business Search provided by the California Secretary of State⁵.
- 2) Must comply with all California Department of Industrial Relations (DIR) registration requirements and California Public Works requirements (Lab. Code § 1720 et seq. and 8

⁵ See: <https://bizfileonline.sos.ca.gov/search/business>



CCR 16000 et seq.).

- 3) Ability to demonstrate the entity is in good financial, operational, and health/safety compliance. See [Appendix B](#) for the Pre-Approval Risk Assessment.
- 4) Ability to demonstrate previous high performance on similar ZEV infrastructure deployment projects. See [Appendix B](#) for the Pre-Approval Risk Assessment.
- 5) Must maintain high performance ratings on all awarded ZEV infrastructure deployment projects.
- 6) Ability to demonstrate working knowledge of EnergIIIZE roles and incentive structure.

6.3.2 Additional Requirements for Installation Partners

Requirements for Installation Partners of EV Infrastructure:

- 1) Must comply with California Public Utilities Code (PUC) Section 740.20⁶ and hold valid licensing as determined by the CSLB.
- 2) Must be EVITP certified, and the electrician's EVITP certification must be valid and current on the [EVITP website](https://evitp.org/california) (<https://evitp.org/california>).

Charging as a Service (CaaS) developers must also agree to full responsibility for project management, installation, construction, operation, and maintenance of charging infrastructure. The CaaS developer is responsible for the total duration of the EnergIIIZE project, which includes six years after project commissioning. CaaS developers should be prepared to provide applicants with a turnkey solution.

Requirements for Installation Partners of Hydrogen Infrastructure:

- 1) Installer must complete a detailed property title search for zoning restrictions and requirements for hydrogen-fueling stations. Once this study is complete, the installer must complete a California Environmental Quality Act (CEQA) investigation and file the forms as required.

⁶ For more information, please see:

https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB841.



2) Senate Bill (SB) 1505 (2006) dictates requirements for hydrogen sold as transportation fuel for any station that receives state funding. Please review the requirements for additional details. Must conform to the **most recent version** of one or more of the following fueling protocols or an equivalently accepted industry standard:

- a. J2601 – 1 Category D (greater than 10 kilogram (kg) tank sizes).
- b. J2601 – 2 HD fueling.
- c. J2601 – 4 Ambient Temperature refueling.
- d. J2601 – 5 MC Method for HD fueling.
- e. JPEC-S 0003 Japanese Bus fueling protocol.
- f. J2600.

Note: Fast fills, (up to 7.2 kg/minute) require a different nozzle with a different standard, International Organization for Standardization (ISO) 27268:2012, and are permitted for heavy-duty vehicles only.

- g. The open retail hydrogen fueling station shall conform to the most recent version of Society of Automotive Engineers (SAE) International J2799 (station communications), verified through the most recent version of Canadian Standards Association (CSA) Hydrogen Gas Vehicle (HGV) 4.3. or an equivalently accepted industry standard Compressed Gas Association (CGA) G-5.3, Commodity Specification for Hydrogen. <https://portal.cganet.com/Publication/Details.aspx?id=G-5.3>.
- h. NFPA 2, Hydrogen Technologies Code, NFPA 55., and NFPA 2 Checklist (2016).
- i. SAE Hardware and Software, where required and as necessary.
- j. California Building Code, Part 2, Title 24.
- k. California Electrical Code, Part 3, Title 24.
- l. California Energy Code, Part 6, Title 24.
- m. California Fire Code, Part 9, Title 24.
- n. The dispenser has been certified to sell hydrogen by the kilogram (pursuant to CCR



Title 4, Division 9, Chapter 1).

- o. The station is connected to the Station Operational Status System, maintained by California Hydrogen Fuel Cell Partnership.
- p. Surface Streets Hydrogen Fueling Station Signage per National Institute of Standards and Technology (NIST) Handbook 130 and Caltrans Manual on Uniform Traffic Control Devices, Section 2I.03

It is recommended that the installer take advantage of all available resources, including the Center for Hydrogen Safety (www.aiche.org) and Hydrogen Tools portal for best practices and procedures (<https://h2tools.org/>).

6.4 Contract Provisions

6.4.1 Terms and Conditions

The Incentive Recipient Terms and Conditions (see [Appendix F, Incentive Recipient Terms and Conditions](#)) specify the requirements the Incentive Recipient must meet in order to receive reimbursement of eligible costs associated with an EnergIIZE conditional award. Costs incurred before the notice of conditional award date are not eligible for reimbursement. Costs incurred between the notice of conditional award and when an Incentive Recipient becomes eligible to submit for reimbursement are at the Incentive Recipient's own risk.

In Step 1, it is the Applicant's responsibility to read and understand the sample Terms and Conditions. If selected for an award, the Incentive Recipient must sign the Terms and Conditions in Step 2. **An Incentive Recipient's failure to sign the Terms and Conditions within 90 calendar days following notice of conditional award will result in cancellation of the conditional award.**

6.4.2 EVITP, DIR, and Insurance Compliance Affidavit

The EVITP, DIR, and Insurance Compliance Affidavit (see [Appendix A, EVITP, DIR, and Insurance Compliance Affidavit](#)) is included for review in Step 1 of all applications. In Step 1, it is the Applicant's responsibility to read and understand the EVITP, DIR, and Insurance Compliance Affidavit. If selected for an award, the Incentive Recipient must sign the Affidavit in Step 2.



6.4.3 Price and Current Market Rates - Equipment Verification Email

The EnergIIIZE project team may verify pricing at any time. The Equipment Verification email is one method that the EnergIIIZE project team may use to confirm pricing and compare market trends (see [Appendix J, Equipment Verification Email Template](#)). Verification will be used at the EnergIIIZE project team's discretion to aid in validating the project site's equipment pricing, as it is listed on the application's Site Equipment Manifest. All EnergIIIZE ZEV infrastructure deployment projects must ensure that all pricing for services involved in the completion of infrastructure is reasonable and reflects current market rates.

6.4.4 Payment Requests

At the time of application, Incentive Recipients shall use the Site Equipment Manifest within the EnergIIIZE application to detail the expected bill of materials required for the project. The EnergIIIZE project team shall determine which project costs listed in the Site Equipment Manifest are EnergIIIZE eligible costs.

Projects awarded after April 2025 are not eligible to receive milestone payments. Payment requests may be submitted only after the project completes all requirements of Step 4 through the IPC and the documentation is confirmed by EnergIIIZE staff (see [Appendix D](#) for requirements).

For projects awarded prior to April 2025 that are eligible for and receive a milestone payment, the project must be successfully completed. **If a project receives a milestone payment and fails to meet completion requirements through Step 4, any milestone payment received must be repaid in full.**

All payment requests are approved at the sole discretion of the EnergIIIZE project team. In addition, CALSTART is entitled to seek repayment of incentive funds if an Incentive Recipient 1) fails to comply with EnergIIIZE's Terms and Conditions, and/or 2) an Incentive Recipient's Project Partner fails to comply with EnergIIIZE's Terms and Conditions.

6.4.5 Project Eligible Costs Invoicing

Payments will only be issued to the Incentive Recipient, identified by the Incentive Recipient TIN listed on the application. All invoices must demonstrate that the purchaser matches the



Incentive Recipient TIN and that the Incentive Recipient TIN incurred the eligible project cost.

Examples of eligible invoices:

- 1) Invoice/Receipt
- 2) Bill of Lading (BOL)
- 3) Net 30 Payment Terms

6.4.6 Invoice Package

The EnergIIZE Commercial Vehicles Project Payment Request Form and Schedule, available in the IPC in Step 4, must be submitted with the invoicing package by the Incentive Recipient. All invoices must demonstrate that the purchaser matches the Incentive Recipient TIN and that the Incentive Recipient TIN incurred the eligible project cost. Upon submission of a payment request, a series of audits will occur to ensure compliance regarding Incentive Recipient duties and responsibilities. Payment shall be issued 15 calendar days after the invoice package is approved by the EnergIIZE team.

Invoicing package shall include all of the following items:

- 1) Eligible invoices (see [Section 6.4.5, Project Eligible Costs Invoicing](#));
- 2) Proof of payment:
 - a. Cancelled check (front and back); or
 - b. Wire transfer **and** a bank statement;
- 3) Supporting Documents:

Request for payment of any kind must be accompanied by supporting documentation. This documentation may include but shall not be limited to:

- a. Incentive Recipient Form W-9
- b. Itemized listings of equipment billed and associated amounts
- c. Equipment Verification Email: At any time, the EnergIIZE team may request the itemized or total payment amounts be verified by the vendor/supplier of any invoice



- d. Itemized direct labor
- e. Proof of Insurance, project permits, CSLB licensing, EVITP certification, DIR registration or exemption, Certified Payroll, time records, and/or labor rates

The foregoing list of supporting documentation is not exhaustive nor comprehensive.

CALSTART, its subcontractors, and the CEC reserve the right to request, at their discretion, any supporting documents or information deemed necessary to verify the accuracy, eligibility, and appropriateness of costs claimed by an Incentive Recipient. Incentive Recipients shall promptly provide such requested documentation, failing which CALSTART, its subcontractors, or the CEC may, at their discretion, deem the costs in question as ineligible for funding in accordance with the design set forth herein and in accordance with applicable laws and regulations governing California state-funded projects.

6.4.7 Incentive Recipient Reimbursement

Costs incurred by the Incentive Recipient TIN that are deemed eligible by the EnergIIIZE project team will be paid out in full until one of the two criteria listed below is met:

- 1) The sum of the total eligible adjusted project costs equals the designated conditional award amount; or
- 2) The maximum incentive offering of total eligible adjusted project costs is met.

6.5 Data Collection Requirements

EVSE data: The Incentive Recipient will be required to provide EVSE quantities with unique identifiers such as serial numbers, maximum output ratings, and charging port quantities available for ZEVs. Exact data required is specified below.

Reporting frequency and duration: The Incentive Recipient shall be required to report data quarterly for six years, beginning at the date of final infrastructure commissioning. Data collection duration is subject to CEC guidance and is pending final determination.

Data quality and accessibility requirements: Incentive Recipients are responsible for coordinating the data collection reporting quality and automation of their equipment. Data must be retained and made accessible to EnergIIIZE staff for the duration of the project terms.



In addition to the aforementioned requirements for EV charging equipment manufacturers and suppliers, for EV charging equipment deployed, the project site's chargers must comply with legislation on **uptime** (i.e., Assembly Bill 2061 [2022]). It is the responsibility of the Incentive Recipient to ensure compliance with this legislation. The legislative uptime and reliability requirements should be treated as the minimum standard. The CEC requires additional uptime/reliability data to ensure chargers are being maintained and operational.

Hydrogen data requirements: Hydrogen utilization data can differ from the EVSE data required, sometimes substantially. Tentative data requirements specific to hydrogen infrastructure are indicated below. In the absence of any indication, Incentive Recipients must report the required datasets.

Units of measurement for reporting: Reporting shall occur in the units requested by EnergIIZE staff. Where units of measurement are not specified or where information is qualitative, Incentive Recipients shall determine the best units in which to report information.

Associated identifier data: Certain data requirements necessitate associated data such as timestamps, site identifiers, charging port identifiers, and equipment identifiers. Each of these values must be provided along with the data for each piece of equipment, work, or other item/task within the project toward which EnergIIZE incentives have been used; and in such a way that each required metric is reported on for each unique piece of equipment, down to the lowest level of granularity.

Data collection: The following metrics may be requested for each ZEV charger or dispenser listed in Step 4 documentation or final invoices. Explanations and reporting templates are provided via email to the reporting agent for the listed data fields when the project's reporting period begins.

- 9) Port/session/site identifier data may include the following. These requirements may be modified to comply with legislative, regulatory, or policy needs at the discretion of the CEC.
 - a. Charger Make and Model
 - b. Charger Serial Number
 - c. Unique EVSE ID
 - d. Unique Port ID
 - e. Unique Site ID
 - f. Charger Location with Latitude and Longitude
 - g. Charger Installation Date



- h. Charger and Port Maximum (kW)
 - i. Charger Connector Types
 - j. Unique Session ID
 - k. Connection Start/End Date and Time
 - l. Active Input and Export Start/End Date and Time
 - m. Energy Consumed and Delivered (kWh)
 - n. Session Peak and Average Demand (kW)
 - o. Session Vehicle Make, Model, and Year
 - p. Session Payment Method and Price
 - q. Session Error Codes
 - r. Unique Interval ID
 - s. Interval Start/End Date and Time
 - t. Interval Energy Consumed (kWh)
 - u. Interval Peak and Average Demand (kW)
 - v. Downtime Reason
 - w. Downtime Start/End Date and Time
- 2) Responses to qualitative questions via Applicant experience survey responses regarding:
- a. Challenges or barriers experienced with charging/fueling equipment
 - b. Whether distributed energy resources were used
 - c. Whether renewable energy was used
 - d. Methods used for managing charging and grid impacts
 - e. Any cost-saving measures used
 - f. Methods for collecting usage data
 - g. Methods for managing charging and grid impacts (resiliency methods)
 - h. Methods for managing hydrogen-fueling efficiency
 - i. Payment methods for fueling
 - j. Charging/fueling schedule (time of day and duration)
 - k. Equipment location type (e.g., street, parking lot, warehouse facility, intermodal facility, public charging facility, rest stop, transit depot, etc.)



- I. Equipment complaints received by the manufacturer
- 3) Vocation and vehicle or equipment type utilizing equipment
- 4) Cost of charging (electricity utility tariff, Electric Vehicle Service Provider (EVSP) service contract, and public charging price), reported in dollars per kWh
- 5) Cost of hydrogen fuel delivered, generated onsite, or sold at a public fueling station, reported in dollars per kg
- 6) Levelized cost of energy, reported in dollars per kWh
- 7) Number, type, date of installation, and location of chargers or hydrogen fueling stations installed

6.6 Confidentiality

EnergIIZE leverages public funding, and the project's details are subject to all requests made by the California Energy Commission. CALSTART and EnergIIZE are not directly subject to the California Public Records Act. To obtain a formal designation on subject category confidentiality, complete the CEC Application for Confidential Designation (located in [Appendix I](#)) and submit the project's request to the California Energy Commission for review and determination by California Energy Commission's Executive Director. Confidentiality determination may take up to 60 days.



List of Acronyms and Abbreviations

Acronyms and Abbreviations	Definition
AB	Assembly Bill
ADA	Americans with Disabilities Act
AHJ	Authority Having Jurisdiction
APL	Approved Product List
BOL	Bill Of Lading
CaaS	Charging as a Service
CalEPA	California Environmental Protection Agency
CARB	California Air Resources Board
CCR	California Code of Regulations
CCS	Combined Charging System
CEC	California Energy Commission
CEQA	California Environmental Quality Act
CES 4.0	CalEnviroScreen 4.0
CGA	Compressed Gas Association
CSA	Canadian Standards Association
CSLB	Contractors State License Board
DAC	Disadvantaged Community
DC	Direct Current
DIR	Department of Industrial Relations
DMS	Division of Measurement Standards
EnergIIZE	Energy Infrastructure Incentives for Zero-Emission
EPRI	Electric Power Research Institute
ESD	Emergency Shut Down
EV	Electric Vehicle
EVITP	Electric Vehicle Infrastructure Training Program
EVSE	Electric Vehicle Supply Equipment
EVSP	Electric Vehicle Service Provider
FCEV	Fuel Cell Electric Vehicle
GFO	Grant Funding Opportunity
GVWR	Gross Vehicle Weight Rating
HGV	Hydrogen Gas Vehicle
HSP	Hydrogen Safety Plan
HVIP	Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project
IM	Implementation Manual
IP	Internet Protocol
IPC	Incentive Processing Center
IRS	Internal Revenue Service
ISO	International Organization for Standardization
kg	Kilogram(s)



kW	Kilowatt(s)
kWh	Kilowatt-hour(s)
lbs.	Pounds
LIC	Low-Income Community
MCS	Megawatt Charging System
MDHD	Medium-Duty and Heavy-Duty
NFPA	National Fire Protection Association
NIST	National Institute of Standards and Technology
NRTL	Nationally Recognized Testing Laboratory
OCP	Open Charge Point Protocol
OSHA	Occupational Safety and Health Administration
PLC	Powerline Carrier
PUC	Public Utilities Code
SAE	Society of Automotive Engineers
SB	Senate Bill
SCE	Southern California Edison
TIN	Taxpayer Identification Number
TLS	Transport Layer Security
V2G	Vehicle-to-Grid
VPL	Vetted Product List
ZE	Zero-Emission
ZEV	Zero-Emission Vehicle



Key Terms

Active Application/Project

Any application that currently has funds reserved under any CEC funded block grant (including but not limited to, CALeVIP 1.0, CALeVIP 2.0, Communities in Charge, EnergIIIZE, ZEBSI) and solicitations. No Incentive Recipient may have more than a cumulative total of 50 active applications/projects open across CEC funded block grants and solicitations.

Adjusted Project Cost

Total project costs adjusted for eligible project expenses and the designated maximum award. For example, total project costs minus any non-Energy Infrastructure Incentives for Zero-Emission (EnergIIIZE) Commercial Vehicles Project reimbursable expenses.

Applicant

An Applicant may be a commercial fleet vehicle operator applying on behalf of their organization, a site owner, authorized lessee, an authorized representative of an infrastructure site, or an EnergIIIZE Approved Project Partner. The Applicant attests that they are the responsible party and will remain so from planning through the end of the six year operation requirement.

California Environmental Quality Act (CEQA)

Meant to avoid and reduce environmental damage and aid in transparency in public-private decision making. CEQA requires public agencies to “look before they leap” and consider the environmental consequences of their actions. CEQA is intended to inform government decision makers and the public about the potential environmental effects of proposed projects and to prevent avoidable environmental damage. If you are just beginning to learn about CEQA, visit the Governor’s Office of Planning and Research’s [Getting Started page \(https://opr.ca.gov/ceqa/getting-started/\)](https://opr.ca.gov/ceqa/getting-started/). Users can also see a comprehensive overview of CEQA [here \(https://lci.ca.gov/ceqa/docs/20210809-CEQA_101.pdf\)](https://lci.ca.gov/ceqa/docs/20210809-CEQA_101.pdf).

Charging as a Service (CaaS)

A general term that applies to developers who build, own, and maintain electric vehicle (EV) infrastructure on behalf of a fleet. This business model varies, but it typically provides a turnkey solution



for equipment, installation, software, site maintenance, and/or driver support for an agreed-upon recurring fee. The service may be onsite or offsite relative to the fleet's primary business address.

Charging Port

An EV charging port provides power to charge only one vehicle at a time even though it may have multiple connectors. The unit that houses EV charging ports is sometimes called a charging post, which can have one or more EV charging ports. See the [Alternative Fuels Data Center Electric Vehicle Charging Stations page](https://afdc.energy.gov/fuels/electricity-stations) (<https://afdc.energy.gov/fuels/electricity-stations>) for more details.

Charging Station

The area in the immediate vicinity of a group of chargers and includes the chargers, supporting equipment, parking areas adjacent to the chargers, and lanes for vehicle ingress and egress. A charging station could comprise only part of the property on which it is located.

Commercial Fleet

A group of one or more vehicles utilized by a company for business or organizational objectives.

Connector

A connector is what is plugged into a vehicle to charge it. Multiple connectors and connector types (such as CHAdeMO and CCS) can be available on one EV charging port, but only one vehicle will charge at a time. See the [Alternative Fuels Data Center Electric Vehicle Charging Stations page](https://afdc.energy.gov/fuels/electricity-stations) (<https://afdc.energy.gov/fuels/electricity-stations>) for more details.

Disadvantaged Communities (DACs)

California Environmental Protection Agency (CalEPA) formally designates four categories of geographic areas as DACs:

- 1) Those communities in the 75th to 100th percentile (top 25 percent) of CalEnviroScreen 4.0 (CES 4.0) scores;
- 2) Census tracts lacking overall scores in CES 4.0 due to data gaps but receiving the highest 5 percent of CES 4.0 cumulative pollution burden scores;
- 3) Census tracts identified in the 2017 DAC designation, regardless of their scores in CES 4.0;



- 4) Lands under the control of federally recognized Tribes. For purposes of this designation, a Tribe may establish that a particular area of land is under its control even if it is not represented as such on CalEPA's DAC map and therefore should be considered a DAC by requesting a consultation with the CalEPA Deputy Secretary for Environmental Justice, Tribal Affairs and Border Relations at TribalAffairs@calepa.ca.gov.

Please see webmaps.arb.ca.gov/PriorityPopulations to find out whether a community falls under the definition discussed here. In determining whether a project site is within a DAC or low-income community (LIC), EnerGIIZE will utilize the site address rather than parcel.

Incentive Recipient

The entity to whom incentives shall be disbursed. The Incentive Recipient is identified by their unique Taxpayer Identification Number (TIN) and must incur all project costs under the TIN listed on their application and on their W-9 to be eligible for reimbursement. Changes to the Incentive Recipient TIN are **not allowed** after application submittal. In most cases, the Incentive Recipient of EnerGIIZE incentives should be the Applicant and primary contact.

Low-Income Community (LIC)

Census tracts identified as low-income per Assembly Bill 1550 (2016). Please see webmaps.arb.ca.gov/PriorityPopulations to find out whether a community falls under the definition discussed here. In determining whether a project site is within a DAC or LIC, EnerGIIZE will utilize the site address rather than parcel.

Priority Communities

Refer to disadvantaged communities (DACs) or low-income communities (LICs) as defined above.

Project

A new or planned expansion of zero-emission vehicle (ZEV) infrastructure at a location with an identifiable address where vehicles will be charging with electricity or fueling with hydrogen.

Project Partners

The terms Vendor, Approved Vendor, and Preferred Vendor have been updated to EnerGIIZE Project



Partners, Application Partners, and Installation Partners.

EnergiIZE maintains a list of partners who can assist in the completion of a Zero-Emission Vehicle (ZEV) infrastructure incentive application and construction project. EnergiIZE Project Partners fall under two categories: **Application Partners** and **Installation Partners**. Application Partners are intended to fulfill more of a project management and advisory role. Installation Partners fulfill more of a contractor's role and perform the physical construction and installation. It is possible for an EnergiIZE Project Partner to be both an Application Partner and an Installation Partner. Detailed definitions for each type of EnergiIZE Project Partner are provided below:

- 1) **Application Partner:** An individual, organization, or company who may apply on behalf of an Applicant and manage the EnergiIZE application process for said client. Application Partners must be vetted by EnergiIZE staff and complete the EnergiIZE Project Partner Application (previously called the Approved Vendor/Installer application), which can be found on the EnergiIZE website (www.energiize.org). Vetted Application Partners are not automatically Installation Partners; they must apply to be an Installation Partner as well. Application Partners are not necessarily required to carry a valid Contractors State License Board (CSLB) number or Electric Vehicle Infrastructure Training Program (EVITP) Certification. For example, consultants or project managers could be Application Partners. Application Partners may apply more than once provided the Applicant and site they are applying on behalf of otherwise meets the eligibility requirements (see [Section 3, Eligibility](#)).
- 2) **Installation Partner:** An individual, organization, or company who installs, commissions, or otherwise aids in the completion of a ZEV infrastructure site and may also apply on behalf of an Applicant and manage the EnergiIZE application process for said client. Installation Partners must be vetted by EnergiIZE staff and complete the EnergiIZE Project Partner Application, which can be found on the EnergiIZE website (www.energiize.org). Installation Partners are required to carry a valid CSLB number. Installation Partners may apply more than once provided the Applicant and site they are applying on behalf of otherwise meets the eligibility requirements (see [Section 3, Eligibility](#)).

Private Station

An EV charging or hydrogen fueling station that is available to one designated MDHD zero-emission



commercial fleet. Also commonly referred to as a depot station.

Public Station

An EV charging or hydrogen fueling station that is publicly available to any MDHD zero-emission commercial fleet.

Shared Station

An EV charging or hydrogen fueling station that is available to two or more MDHD zero-emission commercial fleets through an arrangement with a third-party site owner and operator.

Total Project Cost

Includes all costs associated with building an infrastructure project, including but not limited to conduit, wiring, cement, EV supply equipment (EVSE) or fueling station equipment, network and software, and installation costs.

Vehicle-to-Grid (V2G)

A charging technology that allows energy in an electric vehicle (EV) battery to be pushed back into the electrical grid. V2G is also commonly referred to as bidirectional charging because of the two-way flow of electrical energy.



Appendix A – EVITP, DIR, and Insurance Compliance Affidavit

EVITP, DIR, AND INSURANCE COMPLIANCE AFFIDAVIT	
Incentive Recipient Name or Organization:	
Printed Name of Incentive Recipient's Authorized Representative (first and last):	
Title of Incentive Recipient / Authorized Representative:	
<p>By signing this affidavit, I {Name _____} with respect to {Application Number _____}, {Project Site Address _____}, affirm that I am authorized to attest under penalty of perjury under the laws of the State of California, that each of the statements in the paragraphs below are complete, true, and correct. I understand and agree that applications and projects that do not meet the following requirements may not receive an incentive and any falsification or misrepresentation of information relating to the Project could result in disqualification from EnergiIZE.</p> <ol style="list-style-type: none"> 1. The project shall comply with all Electric Vehicle Infrastructure Training Program (EVITP) requirements listed in Assembly Bill (AB) 841 (2020). (For EVITP details, reference Section 4, Bill Text - AB-841 Energy: transportation electrification: energy efficiency programs: School Energy Efficiency Stimulus Program). 2. The project shall comply with all California Department of Industrial Relations (DIR) registration requirements and California Public Works requirements (Lab. Code § 1720 et seq. and 8 CCR 16000 et seq.). 3. Incentive Recipient hereby warrants that it carries Worker's Compensation Insurance for all of its employees who will be engaged in the performance of this Agreement, and agrees to furnish to CALSTART satisfactory evidence of this insurance at any time CALSTART may request. If Incentive Recipient is self-insured for worker's compensation, it hereby warrants such self-insurance is permissible under the laws of the State of California and agrees to furnish to CALSTART satisfactory evidence of this insurance at any time CALSTART may request. 	
INCENTIVE RECIPIENT SIGNATURE	
I declare under penalty of perjury, under the laws of the State of California, that all the information provided above is true and correct. I further acknowledge that I have read, understand, and agree to be bound by the terms and conditions as outlined.	
Incentive Recipient Name or Organization:	
Printed Name of Incentive Recipient's Authorized Representative (first and last):	
Title of Incentive Recipient / Authorized Representative:	
Signature:	
Date:	



Appendix B – Project Partner Pre-Approval Risk Assessment

Entity name, address, city, state, zip code:	
EIN (Employer ID Number):	
DUNS Number:	
Number of Years in Operation:	
Entity contact person:	
Entity Type of Organization (select one):	
<input type="checkbox"/> Government	<input type="checkbox"/> Nonprofit corporation (Please attach determination letter) <input type="checkbox"/> Corporation/other: _____
<input type="checkbox"/> Individual/ Partnership	
Entity Organization Classification (select all that apply):	
<input type="checkbox"/> Large Business	<input type="checkbox"/> Small Business
<input type="checkbox"/> Minority Institution/Owned	<input type="checkbox"/> Small Disadvantaged Business
<input type="checkbox"/> Woman-Owned Business	<input type="checkbox"/> Other:
Does project require special licenses or certifications?	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA	
Does Entity possess the required licenses or certifications?	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA	
Is the Entity currently involved in litigation?	
<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain:	
Is the entity currently, or has it ever been debarred or suspended from contracting with federal, state or local governments?	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA If so, when? Explain:	
Within the last five years, has any organization staff been jailed, convicted of a felony or under criminal investigation?	
<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain:	
Has Entity received an award or subaward to conduct programs similar to those covered under this proposed subaward agreement in the last five (5) fiscal years?	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA	
Has Entity annual financial statements been audited by an independent audit firm in the last five (5) years?	



<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was Entity required to comply with the Single Audit requirements of the Uniform Guidance (2 CFR Part 200) in the last five (5) fiscal years?	
<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA

If Entity has been audited, were there any findings, questioned costs or material weaknesses in the last two (2) fiscal years? If yes, please explain any findings or questioned costs with respect to an award or subaward to conduct programs similar to those covered by this proposed subaward agreement.

<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please explain:	

Is the Entity currently experiencing financial or cash flow difficulties?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please explain:	

Does the entity have a financial management system in place to record and segregate project expenditures? (Example: QuickBooks, Sage ERP, Microsoft Dynamics, Custom Proprietary System, etc.)

<input type="checkbox"/> Yes	<input type="checkbox"/> No
How are project costs segregated in the accounting system?	

Does the accounting system identify the receipts and expenditures of program funds separately for each project?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

Does financial management system provide for the effective control over and accountability for all funds, property, and other assets, including but not limited to: (1) comparison of expenditures with budget amounts for each project; and (2) recording of each grant/contract by the budget cost categories shown in the approved budget?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

Does Entity have a system in place to determine that it has met its cost sharing goals, if applicable?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

Does the entity have a timekeeping system to track labor hours by cost objective?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
How are labor hours compiled and labor costs distributed to projects?	

Are all bank accounts reconciled monthly?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

Entity Indirect Costs

Negotiated Federal Indirect Cost Rate? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 10% De Minimis Rate			
(If yes, please attach a copy of your current rate agreement)			
Name of Designated Federal Cognizant Agency (if applicable):			

Does Entity have an effective system of authorizing and approval capital equipment expenditures?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------



Does Entity keep detailed records of individual capital assets and periodically reconcile such records with the general ledger accounts?		
<input type="checkbox"/> Yes <input type="checkbox"/> No		
Does Entity have effective procedures for authorizing and accounting for the disposal of property and equipment?		
<input type="checkbox"/> Yes <input type="checkbox"/> No		
Does Entity maintain property records and are they periodically checked against physical inventory?		
<input type="checkbox"/> Yes <input type="checkbox"/> No		
Does Entity have policies that address the following?		
Pay Rates and Benefits	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Leave	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Conflicts of Interest	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Lobbying	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Drug-free Workplace	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Purchasing/Procurement	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Capitalization/depreciation	<input type="checkbox"/> Yes	<input type="checkbox"/> No
In the last 12 months, has the entity hired new senior management personnel (e.g., Executive Director/CEO, Finance Director/CFO) and/or program personnel who would be working on EnergIIZE projects?		
<input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please explain:		
In the last 12 months, has Entity implemented new or substantially changed systems related to its project management?		
<input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please explain:		

By its authorized signatory below, Entity hereby certifies and attests to the accuracy of the above responses and all corresponding information attached.

Signature

[Printed Name]

[Title]

Date



Appendix C – Equity Certification Form

Applicants must demonstrate their status as an equity project if they are applying for additional incentives. Where applicable, use one of the approved methods of self-certification listed.

Check the box next to the applicable category(ies) and attach the requested documentation. If the category selected has multiple options for documentation, please check the box of the option for which you will be providing documentation. Disadvantaged Communities (DAC) and Low-Income Communities (LIC) are defined within Key Terms within the Implementation Manual and can be found on the [Priority Populations map](#).

Verification of the applicable category(ies) will occur before notice of conditional award from EnergIIZE during Step 1. EnergIIZE staff will reach out if there is uncertainty on the determination of the equity self-certification.

I certify that the Applicant Team meets at least one of the following criteria:

- ☐ **Infrastructure will be installed in a designated Disadvantaged Community or Low-Income Community.** The address of the infrastructure to be built using EnergIIZE funds is located within a DAC or LIC census tract. The address used in the application will be used to determine this criterion. No additional documentation is required.
- ☐ **A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities.** Attached is documentation of one of the following:
 - ☐ If the Applicant is a federally recognized Tribal Government listed under the list of Indian Entities Recognized by and Eligible to Receive Services from the United States Bureau of Indian Affairs, check this box – no attachment is required.
 - ☐ If the Applicant is not a Federally Recognized Tribal Government, the Applicant's 501©(3) Determination Letter from the Internal Revenue Service (IRS).
- ☐ **A small business (SB) as recognized by the California State Legislative Code, Section 14837(d)** meaning annual revenue less than \$15 million per year. Attached is documentation of the Applicant's SB certification by the California Department of General Services, Procurement Division (DGS-PD), Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS). Certification must be current.
- ☐ **A Certified Minority Business Enterprise** as defined by California Public Contract Code, Article 12; Woman-Owned Small Business; or a Veteran-Owned Small Business; or a LGBT- Owned Small Business. Attached is documentation of one of the following:



- ☐ Documentation of Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) certification by the California Department of General Services, Procurement Division (DGS-PD), Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS). Certification must be current.
 - ☐ Documentation of certification as a Disadvantaged Business Enterprise (DBE) from CALTRANS, the US Department of Transportation, or another DBE Certifying Agency. Certification must be current.
 - ☐ For those meeting the underlying criteria of one of the categories above but lack the resources to secure official certification, documentation via a self-certification narrative, written on company letterhead, that explains in detail the company's ownership structure and how that meets the relevant requirements. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy these criteria. Narratives are limited to a maximum of 500 words.
- ☐ **A Non-profit organization that qualifies for tax-exempt status with the Internal Revenue Service under Internal Revenue Code Section 501** and are also tax-exempt under California state law, consistent with the following requirements:
- The non-profit organization must have been incorporated for at least one year prior to the time of application submittal.
 - The non-profit organization must at all times be registered and in active/good standing with the California Secretary of State (Certain non-profits that are tribally chartered corporations under tribally enacted laws may be exempt from registration with the California Secretary of State).
 - The organization must be based in California or have at least one full-time staff person based in California.
 - A non-profit lead Applicant must submit the following Supporting Documentation for Eligibility Confirmation (where applicable):
 - a. Evidence of their tax-exempt status with the Internal Revenue Service under Internal Revenue Code Section 501 (Copy of the IRS Determination Letter) and their tax- exempt status under California State law (Copy of Exemption Letter from State of California Franchise Tax Board).
 - b. Evidence of at least one-year incorporation from the time of voucher application submission (Copy of Articles of Incorporation).
 - c. Evidence of being registered and in active and good standing with the California Secretary of State (Copy of Statement of Information and Certificate of Status).



- ☐ **A Public Transit System serving a designated Disadvantaged Community or Low-Income Community.** Attached is documentation of one of the following:
 - ☐ The address of the infrastructure to be built using EnergIIZE funds is located within a DAC or LIC census tract. The address used in the application will be used to determine this criterion. No additional documentation is required.
 - ☐ A self-certification narrative, written on public agency letterhead, that documents that at least 50 percent of applicable routes or coverage areas are within DACs and/or LICs. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy these criteria. Narratives are limited to a maximum of 500 words and may include graphs and visuals.
- ☐ **A Public School District installing infrastructure in a designated Disadvantaged Community, Low-Income Community, and/or a School District serving greater than 50 percent free and reduced-price meals to students, or another program intended to serve Economically Disadvantaged students.** Attached is documentation of one of the following:
 - ☐ The address of the infrastructure to be built using EnergIIZE funds is located within a DAC or LIC census tract. The address used in the application will be used to determine this criterion. No additional documentation is required.
 - ☐ A self-certification narrative, written on district letterhead, that documents that at least 50 percent of the students served by the school district are eligible for free or reduced-price meals or another program intended to serve Economically Disadvantaged students. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy these criteria. Narratives are limited to a maximum of 500 words.



Appendix D – Summary of Project Step Requirements

The following section outlines requirements to progress through Steps 1 through 4, detailed in [Section 5, EnergIIZE Award Process](#). Applicants must provide documentation through the IPC to verify progress within each Step. All Steps have a time guideline which all awarded projects must adhere to. Failure to submit the required documentation within the given timeframes will result in a Notice of Performance and possibly cancellation of the award. To move on to the next project Step, documentation for all items listed, in addition to lane-specific documents and responses to required questions, must be provided and approved by EnergIIZE. Applicable requirements will be confirmed prior to project agreement execution.

Required Documents for Each Step in the EnergIIZE Project
Step 1 SUBMIT APPLICATION
Site Verification Form/Proof of Property Ownership
Communication from utility with new service request and/or utility coordination
Formal Charger/Dispenser equipment quote
Preliminary or Final Site Plan (depending on Readiness Tier)
Issued or Submitted Building Permit/AHJ Permitting Checklist (depending on Readiness Tier)
Equity Certification Form (if meeting equity criteria)
Vehicle Commitment Agreement/Proof of vehicle serviced (ownership/purchase order/customer base/voucher)
Acknowledgement of Incentive Recipient Terms & Conditions and EVITP, DIR, and Insurance Affidavit
Additional supporting documents as required
Step 2 SUPPORTING DOCUMENTS Due 90 days after notice of conditional award
Signed Incentive Recipient Terms and Conditions
Signed DIR, Insurance, and EVITP Affidavit
Hydrogen Safety Plan – Hydrogen projects only
Proof of Critical Milestones Step 2 - Hydrogen projects only (Proof of AHJ and Fire Permitting meetings)
Hydrogen Project Attestation of Codes and Standards – Hydrogen projects only
Additional supporting documents as required
Step 3 CONSTRUCTION
Issued Building Permit



Construction Timeline
Utility confirmation of site capacity
EVSE or hydrogen fueling equipment Purchase Orders
Final Site Plans (if awarded before April 2025)
Proof of Critical Milestones Step 3 – Hydrogen projects only (Proof of utility connection and hydrogen supplier meetings)
Additional supporting documents as required
STEP 4 COMMISSIONING Due 24 months (EV projects) or 36 months (hydrogen projects) after notice of conditional award
Signed Inspection Sheet and Closed Building Permit
Third-Party Network Provider Communications Contract (EV projects only)
Verification that chargers/dispensers are in working order
Photos of serial numbers for all installed charging/fueling equipment
Photographic evidence of the site and installed equipment
Notification of operational and open retail status
Final Project Summary Sheet
Proof of Contractor License, Insurance, and EVITP
Final Site Plans (if awarded after April 2025)
Final proof of payment and invoice package
Additional supporting documents as required



Appendix E – Extension Request and Cancellation Policy

General

EnergIIZE Commercial Vehicles (EnergIIZE) may grant Incentive Recipients extensions and cancellations ONLY when project delays or other mitigating circumstances are outside the Incentive Recipient's control, can be documented by the Incentive Recipient, AND sufficient project progress can be demonstrated to the satisfaction of CALSTART. Incentive Recipients must report project delays within 30 calendar days of becoming aware of them to EnergIIZE Staff.

Extension requests will be evaluated individually based on the established criteria, and the decision to grant an extension will be made by EnergIIZE Staff. Incentive Recipients agree to be bound by said determinations in accordance with the Terms and Conditions for participation in EnergIIZE. Any Incentive Recipient who fails to complete their project within the 24 months electric vehicle (EV) project timeline or 36 months hydrogen (H2) project timeline from Notice of Conditional Award and does not receive an approved extension from EnergIIZE will be subject to cancellation.

Any efforts made to abuse, circumvent, or not abide by said determinations may lead to temporary or permanent forfeiture of eligibility for participation in EnergIIZE. Such determinations shall be made solely by EnergIIZE and subject to appeal at the discretion of CALSTART.

1 Requesting an Extension

1.1 [Process for Requesting an Extension](#)

Requests for extension must be made in writing via the Incentive Recipient's profile in the Incentive Processing Center (IPC) using the Extension Request Form. The request must clearly explain the nature of the delay, how that delay is outside of the Incentive Recipient's control, and include appropriate supporting documentation explaining the reason for the delay (e.g., email correspondence from permitting agency, equipment procurement documents, etc.). Any requests without supporting documentation shall be declined.

All requests for extension must include a plan for completing the necessary task for which the extension is requested and within the extension period.



EnergIIZE may determine additional documentation is necessary to evaluate an extension request. The Incentive Recipient will have five (5) business days from the date that a request is received to provide said documentation. Additional time may be provided at the discretion of EnergIIZE. Failure to comply with this request will result in denial of the extension request.

1.2 Timing

EnergIIZE Incentive Recipients are required to submit Project Step requirements by their respective deadlines (see Implementation Manual for Project Step requirements and timelines). Projects requesting an extension to complete the Project Step requirements must submit their request, via the IPC, at least 15 calendar days prior to the deadline. Requests made outside this window must clearly explain why such requests could not have been made earlier.

Approved extensions shall not exceed six (6) months for EV or eight (8) months for H2 past a given deadline (per extension), unless explicitly granted in writing from EnergIIZE Staff. Incentive Recipients are required to notify EnergIIZE of any delays as the Incentive Recipient becomes aware and submit an extension request as early as possible. Failure to do so may result in denial of the request.

1.3 Delays Outside Incentive Recipient's Control

All extension requests must be based on a need created by project delays outside the Incentive Recipient's control. Such project delays eligible for consideration of an extension shall be limited to:

Excusable Extension Reason	Supporting Documentation
Equipment Issues – Includes delivery delays and non-functioning equipment issues.	Notification of issues and shipping ETA from equipment distributor
Permit Approval by AHJ (Authority having Jurisdiction) – Includes CEQA process delays	Evidence of permit processing status/timelines; evidence of persistent follow-up with agencies or other authorities outside the Incentive Recipients' control. Proof of accuracy and completeness of information provided to



	permitting agencies.
Utility Design or Interconnection	Evidence of utility status/timelines
Municipal Process – Includes delays with RFP/RFQ for equipment and general contractor selection	Self-certified letter detailing municipal process delays, with evidence of RFP/RFQ bid review and selection process status. (ex. Board meeting minutes, posted solicitation, etc.)
Extreme Weather	Copy of communication from governing authority, detailing state of emergency and limitations or Self certified letter detailing extreme weather and explanation of the delay, with upcoming schedule.
Public Health Orders or Critical Staff Illness – limiting on-site presence and operations	Copy of communication from governing authority, detailing limitations
Labor Shortage	Email a detailed explanation of the delay and evidence of upcoming scheduled labor and timeframe
Vendor Changes/Issues	<p>Self-certified letter explaining the vendor’s inability to fulfill order, when the change occurred, and replacement vendor. Proof the vendor is in the process of closing or has already shut down. (e.g. Email confirmation from the vendor, news article, public records)</p> <p>Projects in Step 3 and 4: This excusable reason applies only in cases where a vendor has gone out of business or is otherwise unable to supply the originally proposed equipment, causing unavoidable project delays.</p>

Under extraordinary circumstances (e.g., Natural disasters such as fires, earthquakes, etc.), the Project



Team may consider requests for extension for reasons outside of those described above.

1.4 Demonstrating Sufficient Project Progress

EnergIIZE Staff will evaluate whether the Incentive Recipient has made sufficient project progress towards the overall completion of the project in good faith. For the purposes of this document, sufficient project progress shall mean that considerable progress has been made within the current project Step, including the completion of tasks not directly contributing to the delay, at the time the request is made.

Each extension request will be reviewed on an individual basis and be evaluated based on the totality of the circumstances. Determination of whether sufficient project progress has been made shall rest solely with EnergIIZE Staff, and any determinations shall not be subject to appeal.

Examples of actions taken by the Incentive Recipient which may be considered when evaluating whether sufficient project progress has taken place include, but are not limited to:

- Documentation indicating timely and persistent follow-up with permitting agencies, utilities, and property owners/management (beyond that which was included with their application)
- Proof of accuracy and completeness of information provided to permitting agencies and utilities (beyond that which was included with their application)
- Timeliness of equipment and service orders
- Date and time stamped photos of the Project Site
- Proof of other good faith efforts to complete charger installation

The following actions on behalf of the Incentive Recipient **WILL NOT** constitute sufficient project progress:

- Supporting documentation that reflects the Incentive Recipient hindering the progression of the project such as not providing timely responses and communications to contractors, utilities, vendors, etc.
- Inability to timely notify the EnergIIZE project staff of any delays, that materially impact the completion of the project, when such delays become known to the recipient.
- Stopping work (absence the issuance of a stop-work order) or not starting the project due to outside constraints without prior notification to EnergIIZE.



1.5 [Supporting Documentation](#)

Incentive Recipients are required to upload project step documentation (e.g., equipment procurement orders, invoices, inspection cards, etc.) through the Incentive Processing Center (IPC). All extension requests must be accompanied by supporting documentation. **Any requests without supporting documentation shall be declined.**

Please see Implementation Manual for project step documentation requirements.

Compliance with all foregoing stipulations is material to participation in EnergIIIZE. Failure to do so may result in temporary or permanent forfeiture of eligibility for participation in EnergIIIZE in accordance with the Terms and Conditions.

2 Cancellations

2.1 [Incentive Recipient/Applicant Initiated Cancellation](#)

In the event an Incentive Recipient requests to cancel their Award, the Incentive Recipient must do so in writing to infrastructureincentives@tetrattech.com. The request must include all the foregoing materials to be considered complete. The application number must be included in the request. Any funds reserved in association with said award shall be forfeited. Any funds paid via Milestone Payments must be returned within 14 calendar days of cancellation. Any cancelled projects can reapply to future EnergIIIZE funding lanes.

In the event a cancellation request is received **prior to distributing Conditional Notices of Award**, EnergIIIZE Staff shall confirm cancellation of the application, and any relevant documents submitted but not yet reviewed shall therefore not be reviewed or considered for award.

Compliance with all foregoing stipulations is material to participation in EnergIIIZE. Failure to do so may result in temporary or permanent forfeiture of eligibility for participation in EnergIIIZE in accordance with the Terms and Conditions.

2.2 [EnergIIIZE Initiated Cancellation](#)

EnergIIIZE Incentive Recipients are required to complete each step of the incentive program and respond to all communications in a timely manner. Failure to respond and/or submit Project Step requirements can result in project award cancellation.



If selected for an award, the Incentive Recipient must sign the EnergIIZE Terms and Conditions in Step 2. An Incentive Recipient's failure to sign the EnergIIZE Terms and Conditions within 90 calendar days following notice of conditional awards will result in cancellation of the conditional award.

Incentive Recipients who fail to complete a Project or Project Step within the allotted timeline, will be issued a Project Performance Review Notice. Recipients will have ten (10) business days to respond to the Notice and provide missing/incomplete step requirements and a concise plan, including a timeline for remaining steps and/or project completion. Satisfactory submissions of missing/incomplete steps requirements and plan for remaining steps will clear and resolve the Project Performance Review Notice.

Failure to remedy the Project Performance Review Notice within ten (10) business days will result in the EnergIIZE team attempting to schedule a meeting with all affected parties. The meeting will include the Incentive Recipient, Fleet (if different), Vendor (if different), and applicable members of the EnergIIZE team. The meeting will allow all parties to determine the status of the project, roadblocks preventing progression, and viability of the project. If viable, the attendees will establish and commit to a project progression plan with necessary extension to complete project. This plan will outline requirements and step deadlines that must be met to allow the project to proceed. Failure to meet these deadlines will result in project and award cancellation. Failure to respond to or schedule a meeting within five (5) business days of initial request will result in project and award cancellation.

Upon determination of award cancellation, the Incentive Recipient is issued a Notice of Cancellation. Any funds paid via Milestone Payments must be returned within 14 calendar days of cancellation. Incentive Recipients can apply to future funding lanes; however, the award cancellation status will be taken into consideration when reviewing projects for conditional award and can prevent future projects from being awarded.

3 Additional Considerations

- In the event a permit expires prior to final inspection, the project will be placed on a 60-day hold. If the permit issue is not resolved within 60 days, the project is subject to cancellation.
- Each project will be allowed a maximum of one extension. In extenuating circumstances, additional time may be provided at the discretion of EnergIIZE. Projects encountering multiple



delays should submit their extension request for the most impactful and time-consuming reason.

- Projects that have received extensions prior to this policy update may be allowed a maximum of one (1) additional extension if requested on or after **04/01/2025**.

Compliance with all foregoing stipulations is material to participation in EnerglIZE. Failure to do so may result in temporary or permanent forfeiture of eligibility for participation in EnerglIZE in accordance with the Terms and Conditions.



Appendix F – EnergiIZE Incentive Recipient Terms and Conditions

TERMS AND CONDITIONS ENERGIIZE INCENTIVE RECIPIENT

Effective October 2025

As a condition for participating in the Energy Infrastructure Incentives for Zero-Emission (EnergiIZE) Commercial Vehicles Project, the incentive Applicant Team, Incentive Recipient, and Application/ Installation Partners must comply with the requirements below with the Incentive Recipient of EnergiIZE funds bearing responsibility for ensuring compliance. Applicant Teams must mutually agree upon which items they intend to be responsible for by initialing each line below and by signing and dating the document. Upon execution of an agreement with CALSTART and the Incentive Recipient, CALSTART will counter sign the document, executing the EnergiIZE agreement.

Infrastructure Will Support Medium and Heavy-Duty Vehicles

1. _____ I assure that equipment purchased with an EnergiIZE incentive, including electric vehicle charging and hydrogen fueling equipment, will be utilized for the charging or fueling of Class 2B – Class 8 commercial vehicles;
2. _____ I agree to provide access to charging/fueling equipment for the intended commercial fleet or the public at the agreed upon location;

Maintaining, Using, and Operating Equipment

3. _____ I agree to ensure that chargers/fueling stations installed in the project are operational at least 97 percent of a charging/fueling site's standard hours of operation for six years after commissioning. Without limitation to other rights and remedies which the CEC may have, including but not limited to provisions specified in the Terms and Conditions of this agreement, this requirement to ensure operability for six years after commissioning shall survive the completion or termination date of this agreement. In addition to the foregoing requirements regarding uptime, I further agree to take reasonable and necessary steps in preparation for compliance with current and forthcoming legislation and regulations



on uptime (i.e., AB 2061) which may impact infrastructure installed after 1/1/2024.

4. _____ I agree to maintain equipment insurance as required by law;
5. _____ I agree to ensure equipment purchased with an EnergIIIZE incentive, including electric vehicle charging and hydrogen fueling equipment, will be maintained as recommended by the manufacturer and as needed to prolong the equipment lifetime;
6. _____ I agree that equipment purchased with an EnergIIIZE incentive, including electric vehicle charging and hydrogen fueling equipment, will be operated as recommended by the manufacturer to ensure durability and efficiency;
7. _____ I agree to the Manufacturer's Terms and Conditions for usage of the equipment and to purchase extended product warranty;

For Charging as a Service Vendors ONLY:

8. _____ I agree to full responsibility for project management, installation, construction, operation, and maintenance of charging infrastructure;
9. _____ I agree to provide and maintain cable management systems for charging stalls and shall ensure compliance with any associated authority having jurisdiction (AHJ) requirements for the fleet or site listed on the application;

For Hydrogen Awardees ONLY:

10. _____ I agree to follow the requirements of the Hydrogen Safety Plan detailed in the Implementation Manual, including compliance, adherence to Hydrogen Safety Plan, and training.
11. _____ I agree that, should the Applicant's adherence with the public guidelines or its Hydrogen Safety Plan(s) lapse, without limitation to any other rights, EnergIIIZE staff reserves the right to cancel the agreement funded by this incentive project.
12. _____ I agree to follow standards, laws, regulations, and guidelines applicable to Hydrogen listed in the Implementation Manual as well as though required by the applicable AHJ and by law.



Vendor Assurances

13. _____ I agree to carry Worker's Compensation Insurance for all employees who will be engaged in the performance of this Agreement and agree to furnish EnergIIZE staff with satisfactory evidence of this insurance at any time it may be requested;
14. _____ If self-insured for worker's compensation, I hereby warrant such self-insurance is permissible under the laws of the State of California and agree to furnish to EnergIIZE staff satisfactory evidence of this insurance at any time EnergIIZE staff may request;
15. _____ I agree to ensure vendor and/or sub-vendor's, Contractors State License Board (CSLB) number is active, in good standing, and make EnergIIZE staff aware of any updates to its status in a timely manner.
16. _____ I agree to perform reasonable due diligence in the selection of a vendor, installer, or subcontractor who aids in the construction, installation, commissioning, or completion of an infrastructure site and hereby waive any rights to hold responsible EnergIIZE staff for potential delays, damages, or injuries; if applicable.

Equipment Compliance

17. _____ I agree that equipment must be in compliance and remain in compliance with all applicable US federal, California state, and local rules and regulations, including those regarding air quality; furthermore, I agree that EnergIIZE staff reserves the right to check compliance at any time;
18. _____ I agree to be available for any follow-up inspection by EnergIIZE staff or their designee, if requested, and agree to provide reasonable facilities and assistance for the safety and convenience of their representatives. All site visits and evaluations will be performed in a manner that does not unduly interfere with or delay the work;

Project Communication

19. _____ When the incentive has been received by the Project Partner, and in any instance wherein the incentive is canceled for any reason, I will notify infrastructureincentives@tetrattech.com if a different person should receive these messages



instead;

Public Funding Sources

20. _____ I agree to disclose to EnerGIIZE staff all sources of public funding that apply to the purchase of any equipment for which I request EnerGIIZE incentives;

ADA Compliance

21. _____ I agree to comply with the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. 12101, et seq.), which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA;

AB 841 Compliance

22. _____ I agree to comply with Assembly Bill 841 (2020), as applicable. AB 841 (Ting, 2020) added Public Utilities Code (PUC) section 740.20, which requires Electric Vehicle Infrastructure Training Program (EVITP) certification to install electric vehicle charging infrastructure and equipment for work performed on or after January 1, 2022, subject to certain exceptions. I agree to comply with EnerGIIZE staff requests for information to confirm compliance with this item.

All electric vehicle 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:

- 1) Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility.
- 2) 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).

Billing and Payment

23. _____ I agree that all projects receiving funds through an EnergIIZE incentive shall comply with all California public works requirements (Lab. Code § 1720 et seq. and 8 CCR 16000 et seq.) including but not limited to the payment of prevailing wages;
24. _____ I agree that all project billings shall clearly summarize actual itemized costs billed and requested for reimbursement as outlined as eligible costs in the EnergIIZE Implementation Manual. I agree that I will not request reimbursement for ineligible costs on any invoice submitted;
25. _____ I agree to submit these itemized project billings and to report matching costs (if applicable) with sufficient supporting documentation and based upon actual costs incurred after notice of conditional award. I further acknowledge that the failure to do so may result in delayed payment;
26. _____ I agree to notify EnergIIZE staff of any changes to this project's Milestone Payment Request Form and Schedule, including but not limited to expected timeline of payment requests, and understand that failure to do so may result in delayed payment;
27. _____ I agree to retain all project records for a minimum of three (3) years after the final payment has been received or after the agreement term, whichever is later, unless otherwise specified in the agreement. These records include but are not limited to payment requests, the equipment invoice(s), proof of purchase, equipment payment information and related bank records, documentation of match funding, and purchaser information;
28. _____ Upon written request from EnergIIZE staff I agree to provide detailed documentation of all project expenses at any time throughout the project and for a period of at least three (3) years thereafter. I acknowledge and agree that project documentation, including documentation of project expenses, is subject to audit by the California Energy Commission or its designated representative.



Requesting New Equipment

29. _____ I agree to seek pre-approval from the EnergIIZE staff on the inclusion of new equipment for approval if not included in the Site Equipment Manifest. I understand that changes to charging/fueling equipment are not permitted after moving to Step 3;

Incentive Processing Center

30. _____ I agree to keep my EnergIIZE Incentive Processing Center account, and any shared accounts, active while I have unredeemed incentives, for the three (3) years after project commissioning;
31. _____ If applicable, I agree to partner with any Project Partner requesting an incentive on my behalf to ensure complete documentation for incentive redemption. I further understand that I will receive automated emails from the EnergIIZE Incentive Processing Center if a Project Partner requests an incentive on my behalf;

Data Collection

32. _____ I agree to ensure data collection during the duration of the EnergIIZE agreement on deployed infrastructure equipment, reported quarterly, starting from the date of final commissioning for six years. Data requirements are outlined in the Implementation Manual and subject to change due to legislative, regulatory, or policy reasons at the CEC's discretion;
33. _____ I agree to respond to surveys put forth by EnergIIZE staff on a quarterly basis for during the duration of the EnergIIZE agreement;

Project Timeline

34. _____ I agree to inform EnergIIZE staff in a timely manner if the deployment timeline (time from conditional award notice to final commissioning) exceeds twenty-four (24) months for EV projects or thirty-six (36) months for hydrogen projects. Failure to do so may place the Incentive Recipient at risk of delayed or cancelled incentive payment(s).



EnergIIIZE Incentive Recipient and, if applicable, Project Partner and Additional Signatories undersigned agree jointly to the following items:

Information Sharing

35. I understand and agree that basic project information (i.e. location, organization name, and infrastructure to be installed) will be shared with geographically relevant utility provider(s) for the purposes of infrastructure planning and incentive coordination;
36. General information about my project may be shared publicly including but not limited to awardee name, project type, project zip code, number and type of infrastructure installed, and number of vehicles being serviced. EnergIIIZE staff will share approximate location on a map for the public to view;

Confidential Information

37. I agree that application materials submitted for this incentive request are considered confidential if marked as such;

Compliance with Terms

38. I agree that failure to comply with the terms of this agreement may result in withholding of future payments or repayment of received incentive funds to EnergIIIZE staff and may be considered for any future award determinations;
39. I acknowledge that if I receive a milestone or incentive payment and the project fails to complete all required steps outlined in this agreement, I will be required to return any disbursed funds to EnergIIIZE. Project non-completion includes, but is not limited to failure to install, commission, or operate the funded infrastructure within the required timeframes.
40. I agree to comply with applicable US federal, California state, and/or local rules, regulations, and law. I agree that failure to do so may result in a cancellation of my incentive and repayment of received incentives;
41. I agree the information represented in all forms submitted to EnergIIIZE staff as part of my application are true and correct and all supporting documentation is true and correct and meet the minimum requirements of EnergIIIZE;



42. I understand and agree that after an incentive request is submitted, the end-user cannot be changed;
43. I understand that EnergIIZE staff reserves all rights and remedies available under the law to enforce the terms of this agreement;

Implementation Manual

44. I acknowledge that EnergIIZE staff may at any time, by written order, make changes within the EnergIIZE Implementation Manual to affect future incentive rollout. Any such changes will not cause an increase or decrease in the estimated cost of, or the time required for, completion of the current project under this agreement;
45. I have read, understand, and agree to all provisions in the EnergIIZE Implementation Manual;

Confidentiality Policy

46. I have read and agree with the EnergIIZE Commercial Vehicles Confidentiality Policy;

Equipment

47. I understand and agree that this EnergIIZE incentive request is only valid for the specific equipment purchased through this specific vendor/manufacture, and that any incentive provided based on this request will be null and void if the purchaser, vendor/manufacture, or equipment identified herein change after incentive receipt or for noncompliance with applicable EnergIIZE requirements;

Acknowledgement of Terms

48. Please place an "X" in the space provided indicating whether one or more parties are signing this agreement:
- _____ Incentive Recipient is sole signer of this agreement: By signing this EnergIIZE Incentive Request Terms and Conditions Form, I acknowledge that I have read and understand, and Incentive Recipient agrees to be bound by, the entire terms and conditions as described above. I certify under penalty of perjury that the information provided is accurate and (if applicable) do hereby assert I



have been granted authority by my organization to sign and agree on their behalf.

- _____Project Partner and/or additional signatories are signing this agreement:

By signing this EnergIIZE Incentive Request Terms and Conditions Form, we acknowledge that we have read and understand, and all signatories agree to be bound by, the terms and conditions as described above. We agree that each party is separately responsible for the numbered items above as defined by the party name next to each numbered item. We acknowledge all parties agree to all the lettered items listed above, jointly. We certify under penalty of perjury that the information provided is accurate and (if applicable) do hereby assert we have been granted authority by our organizations to sign and agree on their behalf.

If applicable, does this incentive request represent your organization's first zero-emission infrastructure purchase?

☐ Yes ☐ No

By Signing the EnergIIZE Incentive Request and Terms and Conditions Form, I acknowledge that I have read and understand, and agree to be bound by, the terms and conditions as outlined above.

I certify that under penalty of perjury that the information provided is accurate.

Incentive Recipient

Company/Organization Name:	
Name of Authorized Representative and Title:	
Signature of Authorized Representative:	
Date:	

CALSTART, Administrator of EnergIIZE

Company/Organization Name:	CALSTART
----------------------------	----------



Name of Authorized Representative and Title:	Piero Stillitano
Signature of Authorized Representative:	
Date:	

Project Partner, if applicable

Name of Project Partner (Company/Organization Name):	
Name of Authorized Representative and Title:	
Signature of Authorized Representative:	
Date:	

Additional Signatory, if applicable

Company/Organization Name:	
Relationship to project (recipient, applicant team member, installation partner, fleet, etc.):	
Name of Authorized Representative and Title:	
Signature of Authorized Representative:	
Date:	

Additional Signatory, if applicable

Company/Organization Name:	
Relationship to project (recipient, applicant team member, installation partner, fleet, etc.):	
Name of Authorized Representative and Title:	



Signature of Authorized Representative:	
Date:	



Appendix G – Site Verification Form

This form establishes that the installation work is authorized by the owner of the real property (Property Owner). The purpose of this form is to establish that the EnergIIZE Applicant or participant is able and authorized to make alterations and/or improvements necessary for infrastructure to be constructed and commissioned. If new or upgraded equipment is provided by the utility, then proof of easement is required. Please contact EnergIIZE staff if you are unable to obtain the proper signature(s) for this Site Verification Form.

This form is required by all Applicants. Where Applicants are the Property Owners, they must attach proof of ownership in attachment to this form. Applicants who are not the Property Owners must receive a signature on this form from the Property Owner⁷.

EnergIIZE Applicant. Please complete as follows:		
Organization Name:		
Installation Site Address:		
City:	State:	Zip Code:
Applicant hereby represents and warrants to EnergIIZE Staff: (i) that all the foregoing information is true and correct; and (ii) that the undersigned has been duly authorized by Applicant to execute and submit this Site Verification Form. Applicant acknowledges and agrees that EnergIIZE staff is relying on Applicant's foregoing certifications in reviewing and approving of Applicant's application.		
Signature of Authorized Applicant or Representative of Applicant:		
Print Name:	Title:	
Date:		

PROPERTY OWNER. Please complete as follows:	
Provide the name of the company, city, trust, organization or individual that owns the property where the project site will be located ("Owner").	
Property Owner Name:	
The undersigned, on behalf of _____ ("Owner"), hereby represents and warrants to EnergIIZE staff (i) that Owner is the property Owner located at _____ ("Property") where infrastructure will be installed; (ii) that Owner has consented to EnergIIZE Applicant's/participant's installation of certain EV charging station equipment and/or hydrogen fuel cell refueling equipment at the property; and (iii) that the undersigned has been duly authorized to execute and submit this Site Verification Form to EnergIIZE staff. Owner acknowledges and agrees that EnergIIZE staff is relying on Owner's foregoing certifications in reviewing and approving of Applicant's application.	
Signature of Property Owner or Representative of Property Owner:	
Print Name:	Title:
Date:	

After completion of this form, please await review from the EnergIIZE team and be prepared to provide additional information if necessary. EnergIIZE staff reserve the right to require that participant and owner provide such further information as may be required to review and approve an application.

⁷ On a case-by-case basis, a written Letter of Intent (LOI) signed by the landlord certifying that the Property Owner and the Applicant authorize the installation work may satisfy this Step 1 requirement in lieu of the Property Owner signature on this form. However, the Site Verification Form must be executed by the Property Owner and submitted to EnergIIZE staff in Step 2.



Appendix H – Authority Having Jurisdiction Permitting Checklist



CITY OR COUNTY OF _____ RESIDENTIAL AND NON-RESIDENTIAL CHECKLIST FOR PERMITTING ELECTRIC VEHICLES AND ELECTRIC VEHICLE SERVICE EQUIPMENT (EVSE)

(Replace with City or County logo)

Please complete the following information related to permitting and installation of Electric Vehicle Service Equipment (EVSE) as a supplement to the application for a building permit. This checklist contains the technical aspects of EVSE installations and is intended to help expedite permitting and use for electric vehicle charging.

Upon this checklist being deemed complete, a permit shall be issued to the applicant. However, if it is determined that the installation might have a specific adverse impact on public health or safety, additional verification will be required before a permit can be issued.

This checklist substantially follows the “Plug-In Electric Vehicle Infrastructure Permitting Checklist” contained in the Governor’s Office of Planning and Research “Zero Emission Vehicles in California: Community Readiness Guidebook” and is purposed to augment the guidebook’s checklist.

Job Address:	Permit No.
<input type="checkbox"/> Single-Family <input type="checkbox"/> Multi-Family (Apartment) <input type="checkbox"/> Multi-Family (Condominium) <input type="checkbox"/> Commercial (Single Business) <input type="checkbox"/> Commercial (Multi-Businesses) <input type="checkbox"/> Mixed-Use <input type="checkbox"/> Public Right-of-Way	
Location and Number of EVSE to be Installed: Garage ____ Parking Level(s) ____ Parking Lot ____ Street Curb ____	



Description of Work:

Applicant Name:	
Applicant Phone & email:	
Contractor Name:	License Number & Type:
Contractor Phone & email:	
Owner Name:	
Owner Phone & email:	

EVSE Charging Level: <input type="checkbox"/> Level 1 (120V) <input type="checkbox"/> Level 2 (240V) <input type="checkbox"/> Level 3 (480V)	
Maximum Rating (Nameplate) of EV Service Equipment = _____ kW	
Voltage EVSE = _____ V	Manufacturer of EVSE: _____
Mounting of EVSE: <input type="checkbox"/> Wall Mount <input type="checkbox"/> Pole Pedestal Mount <input type="checkbox"/> Other _____	

System Voltage:	
<input type="checkbox"/> 120/240V, 1 ϕ , 3W	<input type="checkbox"/> 120/208V, 3 ϕ , 4W <input type="checkbox"/> 120/240V, 3 ϕ , 4W
<input type="checkbox"/> 277/480V, 3 ϕ , 4W	<input type="checkbox"/> Other _____



Rating of Existing Main Electrical Service Equipment = _____ Amperes
Rating of Panel Supplying EVSE (if not directly from Main Service) = _____ Amps
Rating of Circuit for EVSE: _____ Amps / _____ Poles
AIC Rating of EVSE Circuit Breaker (if not Single Family, 400A) = _____ A.I.C. (or verify with Inspector in field)

Specify Either Connected, Calculated or Documented Demand Load of Existing Panel:
<ul style="list-style-type: none"> • Connected Load of Existing Panel Supplying EVSE = _____ Amps
<ul style="list-style-type: none"> • Calculated Load of Existing Panel Supplying EVSE = _____ Amps
<ul style="list-style-type: none"> • Demand Load of Existing Panel or Service Supplying EVSE = _____ Amps (Provide Demand Load Reading from Electric Utility)
Total Load (Existing plus EVSE Load) = _____ Amps
<p><i>For Single Family Dwellings, if Existing Load is not known by any of the above methods, then the Calculated Load may be estimated using the "Single-Family Residential Permitting Application Example" in the Governor's Office of Planning and Research "Zero Emission Vehicles in California: Community Readiness Guidebook" https://www.opr.ca.gov</i></p>



EVSE Rating _____ Amps x 1.25 = _____ Amps = Minimum Ampacity of EVSE Conductor =
_____ AWG

For Single-Family: Size of Existing Service Conductors = # _____ AWG or kcmil
- or - : Size of Existing Feeder Conductor
Supplying EVSE Panel = # _____ AWG or kcmil
(or Verify with Inspector in field)

I hereby acknowledge that the information presented is a true and correct representation of existing conditions at the job site and that any causes for concern as to life-safety verifications may require further substantiation of information.

Signature of Permit Applicant: _____ Date: _____



Appendix I – Application for Confidential Designation

Any person submitting a record to the CEC must specify if it should be designated a confidential record by providing an application for confidential designation. The application, which is not confidential, will be reviewed and acted upon by the executive director in consultation with the chief counsel. The CEC's process for reviewing and designating records as confidential can be found at California Code of Regulations, title 20, section 2505.

Filing Process

Applications for confidentiality, and the confidential documents, must be uploaded directly to the Docket Unit through the e-filing system. Individual documents cannot exceed 30 MB.

Applications submitted directly to staff and not to the Docket Unit will not be acted on and the documents may be subject to disclosure. For filings not associated with any specific proceeding, the application and relevant records shall be filed into docket **22- MISC-01**. Links to the e-filing system are provided on most proceeding webpages labeled “**Submit e-filing**.” Alternatively, go directly to the [e-filing log-in page](#):

https://efiling.energy.ca.gov/Login.aspx?perms_1&returnurl=http%3A//efiling.energy.ca.gov/EFiling/EfileSelect/Proceeding.aspx

For additional information on e-filing see: CEC's E-filing and E-commenting System [User's Training Guide](#), https://www.energy.ca.gov/sites/default/files/2020-03/Efiling_User_Training_Guide_Feb2020_ADA.pdf.

Registration is necessary the first-time documents are uploaded. After registering, to submit a confidential filing click on **Quick Actions** from the **DASHBOARD** and select **Submit Confidential e-filing** from the dropdown list. The application must be uploaded first followed by one or more confidential files. **Failure to follow these steps may result in confidential material becoming public.** If you have questions regarding the filing process, contact the Docket Unit at docket@energy.ca.gov.

The following are some of the processes for requesting confidentiality of records:

A. Repeated Applications for Confidentiality (20 CCR 2505 (a)(4).)

These are applications claiming that the CEC has previously found the data confidential. It is not necessary to include legal arguments. If you are filing your request on this basis submit a letter including, the date and transaction number of the CEC's original determination letter if known and a certification that the records at issue are substantially similar to the records previously designated as confidential, and that the facts and circumstances have not changed.

B. Automatic Confidentiality for certain categories of data (20 CCR 2505 (a)(5).)

C. Records provided by Public Agencies (20 CCR 2505(b).)

D. Standard Applications for Confidentiality (20 CCR 2505(a)(1).)

These applications require the applicant to present a legal basis for a determination that the information submitted should be held as confidential and not subject to disclosure. A deficient or incomplete application may be subject to requests for clarification or be returned to the applicant with a statement of its defects.

For standard applications, provide a written letter (application for confidentiality) containing



complete responses to the information requested below in the following order:

1. Contact Information: (20 CCR 1208.1.)

Applicant Name

Phone Number

E-mail

Proceeding Name

Docket Number

2. Title, date, and description (including number of pages) of the information or data for which you request confidential designation. (20 CCR 1208.1.)

3. Specify the part(s) of the information or data for which you request confidential designation. (If the data is in charts or spreadsheets, highlighting is sufficient.) (20 CCR 2505(a)(1)(B.))

4. State and justify the length of time the CEC should keep the information or data confidential. The term requested must be relevant to the stated basis for confidentiality. (20 CCR 2505(a)(1)(C.))

5. State the provision(s) of the California Public Records Act or other law that allows the CEC to keep the information or data confidential and explain why the provision(s) apply to that material. (See Gov. Code, §§ 7920.000-7930.215.) (20 CCR (a)(1)(D.))

6. If the applicant believes that the information or data should not be disclosed because it contains trade secrets or its disclosure would otherwise cause a loss of a competitive advantage, the application also shall state: (20 CCR (a)(1)(D.))

(a) the specific nature of that advantage,

(b) how the advantage would be lost,

(c) the value of the information to the applicant, and

(d) the ease or difficulty with which the information could be legitimately acquired or duplicated by others.

7. State whether the information or data can be disclosed if it is aggregated with other information or masked to conceal certain portions. State the degree of aggregation or masking required. If the data cannot be disclosed even if aggregated or masked, explain why. (20 CCR 2505(a)(1)(E.))

8. State how the information or data is kept confidential by the applicant and whether it has ever been disclosed to a person other than an employee of the applicant. If it has, explain the circumstances under which disclosure occurred. (20 CCR 2505(a)(1)(F.))

9. At the signature line, include a certification stating: "I certify under penalty of perjury that the information contained in this application for confidential designation is true, correct, and complete to the best of my knowledge." (20 CCR 2505(a)(1)(G.))

10. State whether the applicant is a company, firm, partnership, trust, corporation, or other business entity, or an organization, or association and state that the person preparing the



request is authorized to make the application and certification on behalf of the entity, organization, or association. (20 CCR 2505(a)(1)(G.))



Appendix J – Equipment Verification Email Template

EQUIPMENT VERIFICATION EMAIL TEMPLATE

Purpose:

Verification is required prior to payment for equipment reimbursement on equipment expenses where it was determined that the price is over market value.

Instructions:

1. Incentive Recipient Sends E-Mail to Vendor, CC'ing the EnergIIZE Team at infrastructureincentives@tetrattech.com.
2. Vendor responds to the questions on the email and submits responses to both Incentive Recipient and the EnergIIZE Team.
3. The EnergIIZE Team uploads the email into the IPC for record keeping.

EMAIL SUBJECT: [Application Number] - Equipment Purchase Price Verification

EMAIL TEXT:

Dear [name of vendor contact],

Can you please respond to the EnergIIZE Team (CC'd) by replying to this email to verify for the EnergIIZE Program the pricing for the [product name] that will be purchased by [Incentive Recipient name], per PO [vendor PO number] (attached), by responding to the questions below?

1. Was the equipment listed on the attached PO ordered by [Incentive Recipient name]? If yes, what was the cost of the equipment?
2. Has [Incentive Recipient name] paid the invoice in full?
 - a. If yes, when was the invoice paid in full?
 - b. If no, please describe the payment plan for [Incentive Recipient name] to pay the invoice in full.
3. Has the equipment been delivered and/or installed (if applicable)?
 - a. If yes, what was the date of delivery and/or installation (if applicable)?

Responses to the above questions are required by EnergIIZE for reimbursement from the program, for project related expenses incurred by [Incentive Recipient name].

Thank you,

[Incentive Recipient representative email signature]



Appendix K – Hydrogen Fueling Station Critical Milestones

Should an Applicant pursuing incentives be deemed eligible for participation in the Energy Infrastructure Incentives for Zero-Emission (EnergIIIZE) Commercial Vehicles Project they must submit proof of having completed the following critical milestones. EnergIIIZE incentives will not be awarded for a hydrogen fueling station unless the Applicant meets all critical milestones outlined below.

Critical Milestone Step 2: The Applicant (for station address submitted with the application) must hold the following meetings:

1. An in-person, telephone, or web-based pre-application meeting for permits to build and operate each proposed hydrogen fueling station with the Authority Having Jurisdiction (AHJ) over the project and entitlement process. The meeting should include but not be limited to discussion of the purpose and design of the hydrogen fueling station(s), the entitlement and permit application process, zoning requirements, aesthetics, AHJ's California Environmental Quality Act (CEQA) process, and project timeline. The meeting may be, for example, a scheduled presentation given by the Applicant to AHJ or an unscheduled discussion with AHJ staff.
2. An in-person, telephone, or web-based pre-application meeting, at the same time or separately from the meeting with AHJ regarding permits, and with a representative of the Office of the Fire Marshal, or other similar fire control office, in AHJ. The meeting should include but not be limited to discussion about how to obtain compliance with local fire code requirements and National Fire Protection Association (NFPA) 2 and NFPA 55 requirements.

The Applicant must provide to the EnergIIIZE staff proof of having met this critical milestone by submitting notes from each meeting, including date, time, location, names and titles of meeting participants; a summary of the topics discussed; and any open issues and next steps. EnergIIIZE staff will determine whether the documentation submitted by the Applicant is sufficient to show that this critical milestone has been met.

Critical Milestone Step 3: The Applicant (for station address submitted with the application) must hold the following meetings:

1. For stations that will be serviced by a utility, the Applicant must meet with representatives of the utility company that will serve each proposed station to arrange the utility connection.



2. The Applicant must meet with representatives of the hydrogen fuel supplier that will serve the station to arrange the supply chain and hydrogen delivery.

The Applicant must provide proof to EnergIIZE staff of having met this critical milestone by submitting meeting notes, including date, time, location, names, and titles of meeting participants; a summary of the topics discussed; and any open issues and next steps. EnergIIZE staff will determine whether the documentation submitted by the Applicant is sufficient to show that this critical milestone has been met.

Hydrogen fueling stations must comply with all the required codes and standards listed in the [Hydrogen Project Attestation of Codes and Standards](#) form.

The California Air Resources Board has started investigating if a regulatory-required station evaluation/verification process, which could include a fee payment, is needed. The ability for a third party to perform this evaluation is one of the topics being researched.

