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EnergIIZE COMMERCIAL VEHICLES

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

Release Date: December 16, 2021

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

STATE OF CALIFORNIA ENERGY COMMISSION SINCE 1975

CALSTART

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1. List of Acronyms

Acronym	Description
AB	Assembly Bill
ACT	Advanced Clean Truck
ADA	Americans with Disability Act
ADP	Automated Demand Response
AHJ	Authority Having Jurisdiction
ANSI	American National Standards Institute
ASME	American Society of Mechanical Engineers
ASTM	American Society for Testing and Materials
CALSTEP	California Secure Transportation Energy Partnership
CARB	California Air Resources Board
CAT	Category
CCR	California Code of Regulations
CEC	California Energy Commission
CEQA	California Environmental Quality Act
CGA	Compressed Gas Association
CORE	Clean $Off - Road$ Equipment Voucher Incentive Project
CSA	Canadian Standards Association
CTEP	California Type Evaluation Program
DCFC	Direct Current Fast Charger
EIR	Environmental Impact Report
EMS	Energy Management System
EnergIIZE Commercial Vehicles	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles
EV	Electric Vehicle
EVITP	Electric Vehicle Infrastructure Training Program
EVSE	Electric vehicle supply equipment
EVSP	Electric Vehicle Service Provider
FHWA	Federal
GVWR	Gross Vehicle Weight Rating
HGV	Hydrogen Gas Vehicle
HSP	Hydrogen Safety Plan
HVIP	Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project
ICT	Innovative Clean Transit
IEC	International Electrotechnical Commission
IEEE	Institute of Electrical and Electronics Engineers
IETF	Internet Engineering Task Force
IOU	Investor-Owned Utilities
IP	Internet Protocol
ISO	International Organization for Standardization (ISO)
ITU	International Telecommunication Union
LCFS	Low Carbon Fuel Standard
LIC	Low-Income Community

MD/HD	Medium and Heavy Duty
NFPA	National Fire Protection Association
NIST	National Institute of Standards and Technology
NOE	Notice of Exemption
NRTL	Nationally Recognized Testing Laboratory
NTEP	National Type Evaluation Program
OCPP	Open Charge Point Protocol
OEM	Original Equipment Manufacturer
OSHA	Occupational Safety and Health Administration
PG&E	Pacific Gas & Electric
PLC	Power Line Carrier
PNNL HSP	Pacific Northwest National Laboratory Hydrogen Safety Program
PO	Purchase Order
PUC	Public Utilities Code
RSA	Registered Service Agent
SAE	Society of Automotive Engineers
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric
SGIP	Smart Grid Interoperability Panel
TCP	Transmission Control Protocol
TIRCP	Transit and Intercity Rail Capital Program
VGI	Vehicle Grid Integration
ZE	Zero Emission
ZEV	Zero Emission Vehicle

2. Key Terms

Applicant

The individual, organization, or company who fills out application forms and is responsible for coordinating all subsequent documentation described in the Implementation Manual (IM) for their infrastructure project. An Applicant may be a commercial fleet or vehicle operator applying on behalf of their organization. An Applicant may also be a vendor in charge of the completion of an infrastructure project applying on behalf of a commercial fleet.

Approved Vendor

An individual, organization, or company who may apply on behalf of a commercial fleet and manage the EnergIIZE application process for said fleet. Approved vendors must be vetted by EnergIIZE staff and complete the Approved Vendor/Installer application (see Appendix K).

Disadvantaged Communities

Those communities who are in the 75th to 100th percentile (top 25%) of CalEnviroScreen 4.0

scores.[1]

Low-Income Community

Residents of census tracts identified as low-income per Assembly Bill 1550, or a low-income household per Assembly Bill 1550.[2]

Domiciled (verb)

Reside or be based in a particular location.

Eligible Equipment

Equipment eligible for incentive funding through EnergIIZE is defined as, equipment from the customer side make-ready, where it is not currently offered by utilities, to the plug/nozzle of a vehicle and whose installation directly or indirectly provides the means for recharging or refueling of a Class 2b or larger zero-emission vehicle (GVWR of 8,501 lbs. and greater).

Preferred Vendor

An individual, organization, or company who install, commission, or otherwise aid in the completion of a ZEV infrastructure site. Preferred Vendors may NOT apply on behalf of the commercial fleet for whom they are providing infrastructure installation services.

Project

EnergIIZE defines a ZEV infrastructure project ("Project") as a new or planned expansion of ZEV infrastructure at a location with an identifiable address where vehicles will be charging with electricity or refueling with hydrogen. In the event of the need to install infrastructure at slightly different locations, such as different ends of a shipping or distribution center, this is still considered one Project and maintains all the rights and limitations applicable as defined within this Implementation Manual.

Priority Communities

Priority communities/populations include residents of (1) census tracts identified as disadvantaged per Senate Bill 535, (2) census tracts identified as low-income per Assembly Bill 1550[3], or (3) a low-income household per Assembly Bill 1550.

Recipient

The individual, organization, or company to whom incentives shall be dispersed. A Recipient may

[1] For more information, please see https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-40
[2] For more information, please see https://www.arb.ca.gov/cci-communityinvestments.
[3] ibid.

be a commercial fleet or vehicle operator applying on behalf of their organization and may therefore receive incentives for eligible costs they incur throughout the process of infrastructure completion. A Recipient may also be a vendor in charge of the completion of an infrastructure project and must therefore clearly indicate the lowered cost of incentive eligible items on invoices.

3. Introduction and Overview

3.1 Project Background

In April 2021, the California Energy Commission (CEC) announced that $50 million in Clean Transportation Program funding would be awarded to CALSTART for the deployment of zero-emission (ZE) medium- and heavy-duty (MD/HD) electric and hydrogen infrastructure incentive project. Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE) was created to addresses the needs of MD/HD zero-emission vehicles (ZEVs) in California through financial incentives towards the purchase of infrastructure equipment and software. EnergIIZE maintains an equitable approach towards all applicants and their needs and will contribute to improved community health by reducing air pollution and harmful diesel emissions, while helping commercial fleets and industry partners meet State climate goals. EnergIIZE is implemented through support provided by a CEC block grant awarded to CALSTART via a competitive grant solicitation process. While CALSTART is the implementor of this project, EnergIIZE Staff also includes Tetra Tech, Inc. to aid with the application process and incentive processing, and GRID Alternatives provides advisory support for the equity focused project design.

There are several key pieces of policy which provide the overall framework and funding to support EnergIIZE. In September 2020, Governor Newsom signed Executive Order N-79-20[4] mandating the transition of all MD/HD vehicles in California to zero-emission (ZE) by 2045, and 2035 where possible for drayage trucks. Additionally, the Advanced Clean Truck (ACT)[5] and the Innovative Clean Transit (ICT)[6] rules institute phased implementation timelines for the adoption of ZE trucks and public transit, respectively. Both rules were adopted by the California Air Resources Board (CARB), which mandated a complete transition to zero-emission transit buses by 2040 and an increase to at least 40% ZEV sales by 2035 for various truck classes. These state guidelines emphasize the growing market for MD/HD ZEVs and the necessity of further

[4] For more information, please see https://www.gov.ca.gov/wp-content/uploads/2020/09/9.23.20-EO-N-79-20-Climate.pdf
[5] For more information, please see https://ww2.arb.ca.gov/sites/default/files/barcu/regact/2019/act2019/fro2.pdf
[6] For more information, please see https://ww2.arb.ca.gov/sites/default/files/2019-10/ictfro-Clean-Final_0.pdf

incentives to support this transition.

Assembly Bill (AB) 118 (AB 118, Statutes of 2007, Chapter 750) created the Clean Transportation Program, formerly known as the Alternative and Renewable Fuels and Vehicle Technology Program. Administered by the CEC, this program uses funds from vehicle and vessel registration, vehicle identification plates, and smog abatement fees to develop and implement technologies to transform California's transportation landscape.

This Implementation Manual, in conjunction with the eligibility requirements and the corresponding incentive structure, identify the minimum requirements for implementing the project. At the discretion of CEC, funding will be allocated via four (4) distinct lanes. Each lane is tailored to aid in an equitable application and funding process across the state.

The Implementation Manual may be periodically updated to clarify program requirements and improve effectiveness. The Implementation Manual and any updates will be posted on the EnergIIZE webpage at www.EnergIIZE.org. Project participants are responsible for checking the EnergIIZE website on an ongoing basis for the latest updates.

The CEC has sole discretion to determine eligibility for EnergIIZE funding. Definitions of key program parameters are located in the sections that follow.

3.2 Commitment to Diversity and Equity

EnergIIZE Staff and 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 Staff recognizes project location is but one metric for evaluating the equity implications of specific projects. To meet these and other equity objectives, EnergIIZE Staff conducts outreach, workshops, and incorporates public feedback into funding opportunities.

The Fiscal Year 2021-2022 Clean Transportation Program Investment Plan states that "the CEC will seek to provide at least 50 percent of Clean Transportation Program funds from this investment plan toward projects that benefit low-income and disadvantaged communities. The CEC will seek to quantify these benefits in ways that go beyond measuring funding amounts within a given location and will continue to investigate new metrics to ensure these investments enhance equity within the state." Project design of EnergIIZE takes these factors into account with regards to eligibility, incentive structure, and opportunities for technical assistance while maintaining a streamlined participation process. To that end, EnergIIZE aims to provide at least 60% of project funds to infrastructure located in Disadvantaged and low-income communities.

The Office of Environmental Health Hazard Assessment (OEHHA) is the state entity responsible for the development of the "California Communities Environmental Health Screening Tool: CalEnviroScreen 4.0 (CES 4.0)". CES 4.0 is a mapping tool that helps identify California communities that are most affected by many sources of pollution, and where people are often especially vulnerable to pollution's effects. CalEnviroScreen uses environmental, health, and socioeconomic information to produce scores for every census tract in the state. The scores are mapped so that communities can be compared. An area with a high score is one that experiences a much higher pollution burden than areas with low scores. The highest 75-100th percentile, top 25 percent (25%) of CES 4.0 represent "disadvantaged communities" under SB 535. CES 4.0 ranks communities based on data that are available from state and federal government sources. CES 4.0 was last updated in October 2021.

Priority communities is a state term referred in many policy documents, state funding programs and incentives, and other publications. Priority communities/populations include residents of (1) census tracts identified as disadvantaged per Senate Bill 535, (2) census tracts identified as low-income per Assembly Bill 1550, or (3) a low-income household per Assembly Bill 1550.[7]

This Implementation Manual uses CES 4.0 to: 1) identify equity communities, 2) identify minimum investment thresholds, 3) assist applicants in the preparation of their applications to the EnergIIZE Project, and 4) enable CEC and CALSTART to understand project applications and project benefits. Further details are provided in later sections under each funding lane.

4 Definition of Eligible Participants and Their Funding Lanes

ZEV infrastructure deployment (electric charging and hydrogen fueling) is a complex endeavor involving many different stakeholders. From commercial fleet managers to infrastructure developers to property owners, a diverse array of individuals and organizations take part in the deployment of ZEV infrastructure. For the sake of clarity and streamlining of processes for all parties involved, defining key terms and concepts is helpful.

4.1 Key Definitions

4.1.1 **Project**: EnergIIZE defines a ZEV infrastructure project ("Project") as a new or planned expansion of ZEV infrastructure at a location with an identifiable address where vehicles will be charging with electricity or refueling with hydrogen. In the event of the need to install infrastructure at slightly different locations, such as different ends of a shipping or

[7] For more information, please see https://www.arb.ca.gov/cci-communityinvestments.

distribution center, this is still considered one Project and maintains all the rights and limitations applicable as defined within this Implementation Manual.

4.1.2 **Applicant**: The individual, organization, or company who fills out application forms and is responsible for coordinating all subsequent documentation described in the IM for an infrastructure project. An Applicant may be a commercial fleet or vehicle operator applying on behalf of their organization. An Applicant may also be an Approved Vendor in charge of the completion of an infrastructure project and apply on behalf of a commercial fleet.

4.1.3 **Recipient**: The individual, organization, or company to whom incentives shall be dispersed. A Recipient may be a commercial fleet or vehicle operator applying on behalf of their organization and may therefore receive incentives for eligible costs they incur throughout the process of infrastructure completion. A Recipient may also be a vendor in charge of the completion of an infrastructure project and must therefore clearly indicate the lowered cost of incentive eligible items on invoices.

4.2 Eligibility for Participation in EnergIIZE

This section describes the eligibility criteria for participation in EnergIIZE. Participation in the EnergIIZE incentive project requires that the Applicant and Recipient are one of the following:

4.2.1 A business, organization, or individual responsible for the operation of a MD/HD ZEV (vehicle class 2B and above) in the state of California (see Table 1 for vehicle class definitions).

4.2.2 A business, organization, or individual responsible for the engineering, construction, procurement, and completion of a ZE infrastructure site in the state of California which shall service MD/HD ZEVs Class 2B or above.

4.3 EnergIIZE Funding Lanes

Stakeholders across the ZEV industry may approach infrastructure planning from a variety of perspectives. They require various levels of technical assistance throughout the process of completing an infrastructure project. Some applicants may be commercial fleets with vehicle deliveries fast approaching, while others may just be starting their planning for ZEV infrastructure deployment. To address the diverse array of potential applicants, EnergIIZE establishes four (4) “Funding Lanes,” each with differing qualifications and incentive structures. Regardless of funding lane, projects must be for MD/HD ZEV infrastructure only.

A Project's Funding Lane is determined by which of the following applies to the commercial fleet or independent owner operator (IOO) whose MD/HD ZEV(s) are supported by the incentivized infrastructure. The exception to this is for the Public Charging Station Funding Lane, as a project of this kind is open for any commercial fleet or IOO to use.

4.3.1 Funding Lane: EV Fast-Track

*If **any** of the following apply to the commercial fleet they are eligible for participation during this funding lane:*

a. Can provide proof of ownership for MD/HD ZEV(s) registered in the state of California.

b. Can show proof of purchase order (PO) for a vehicle(s) registered in the State of California, funded or otherwise incentivized through state/federal projects. Funding and incentive sources may include but are not limited to: Clean Off-Road Equipment Voucher Incentive Project (CORE), Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP), VW, Carl Moyer, AB 617[8], Transit and Intercity Rail Capital Program (TIRCP), California Secure Transportation Energy Partnership (CALSTEP) CMO, and DERA.

c. MD/HD off-road equipment does not require vehicle registration, but must be reside and operate 75% of its time in the state of CA.

4.3.2 Funding Lane: EV Jump Start

*If **any** of the following apply to the commercial fleet, they are eligible for participation during this funding lane:*

a. Small business as recognized by the California State Legislative Code, Section 14837(d).[9]

b. Certified Minority Business Enterprise as defined by California Public Contract Code, Article 12[10], Woman-Owned Small Business, Veteran-Owned Small Business, or LGBT-

[8] For more information, please see https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201720180AB617

[9] https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=14837.&lawCode=GOV#

[10] For more information, please see hhttps://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=PCC&division=2.&title=&part=2.&chapter=2.&article=12.

Owned Small Business.

c. Transit Agency whose infrastructure will be located in a designated Disadvantaged Community (according to CalEnviroScreen 4.0) or in a designated Low-Income Community.

   - For transit agencies that primarily serve Disadvantaged Communities and/or Low-Income Communities but are proposing infrastructure to be located outside of a Disadvantaged Community and/or Low-Income Community census tract, a self-certification narrative, written on agency letterhead, that documents that at least 50% of the transit agency's ridership lives in Disadvantaged Communities and/or Low-Income Communities. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy this criteria.

d. School District whose infrastructure would be located in a designated Disadvantaged Community (according to CalEnviroScreen 4.0), or in a designated Low-Income Community, and/or a School District serving greater than 50% Free and Reduced-Price Meals students. See Appendix for details and accepted documentation.

e. California Federally Recognized Tribes and California Tribal Organizations (as defined by Health and Safety Code Section 44270.3(a)(4))[11], or Non-Government Organization Serving Tribal entities.[12]

f. Commercial fleet is a 501(c)(3) non-profit organization.

g. Commercial fleet recharging infrastructure is in a designated Disadvantaged Community (according to CalEnviroScreen 4.0).

h. Commercial fleet recharging infrastructure is in a Low-income Community (according to AB 1550).

4.3.3 Funding Lane: Public Charging Station

a. Public charging station developers.

b. Must show documentation proving adequate utilization and throughput for the proposed public charging station.

c. Must install DCFC chargers capable of charging at 150 kw or greater. Level 2 chargers are not eligible under this funding lane.

d. Encouraged to provide infrastructure for at least 1 stub-out capable of accommodating a

[11] For more information, please see https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=HSC&sectionNum=44270.3

[12] Such Tribal Organizations are defined as defined as "a corporation, association, or group controlled, sanctioned, or chartered by a California federally recognized tribe that is subject to its laws or the laws of the United States relating to Native American affairs." https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB155

DCFC charger capable of charging at 350 kW or greater.

e. Encouraged to prepare for charging rates of 1MW and higher per plug to accommodate future industry charging demands.

4.3.4 Funding Lane: Hydrogen Fueling

a. Must be for MD/HD hydrogen fuel cell (FCEV) infrastructure projects only.

5 Incentive Structure

The following table describes the incentive structure for EnergIIZE across all four funding lanes including eligible costs, project caps, and type of application.

Table 2: Incentive Structure FY 21–22

	EV Fast-Track	EV Jump Start	Public Charging Station	Hydrogen Fueling
Type of Application	First Come, First Served	Competitive	Competitive	Competitive
Maximum Incentive Offering	50% of Hardware and Software Costs Incurred*	75% of Hardware, Software, and Soft Costs**	50% of Hardware and Software Costs Incurred*	50% of Hardware and Software Costs Incurred*
Eligible for Milestone Payments	Yes	Yes	Yes	Yes
Maximum Project Cap	$500,000*	$750,000	$500,000*	$2,000,000*

**See Section 5.4 for more information on applicants meeting EV Jump Start Criteria.*
***See Section 6.1 for more information on Soft Costs eligible for incentives.*

5.1 Application Types

EnergIIZE uses two types of application processes to determine which projects are awarded funding; a competitive application process, and a first come, first serve process. All applicants applying during the EV Fast-Track period shall be awarded on a first come, first served basis. Applicants applying during any of the remaining three lanes (EV Jump Start, Public Charging Station, or Hydrogen Fueling) shall be considered on a competitive basis.

5.2 Incentive Offerings and Project Caps

EnergIIZE provides incentives for equipment and charge management software (see Section D:

Infrastructure Technology Eligibility). Incentives received through EnergIIZE in combination with any other funding sources may not exceed the total cost of a given piece of equipment. Incentive contributions towards financing a project's completion may not exceed the total cost of a given project. Furthermore, depending upon funding lane, a given project may not receive incentives from EnergIIZE in excess of the maximum project caps described in Table 2.

The purpose of maximum project caps is to encourage efficient use of State incentive funding, while also promoting a diverse array of applicants who receive said funding.

5.3 Milestone Payments

EnergIIZE provides milestone payments for eligible costs incurred throughout the lifecycle of an infrastructure project. Milestone payments shall not equal more than 50% of the Applicant's notice of conditional award.

For example, an EV Jump Start applicant is provided a notice of conditional award for the amount of $750,000 in incentives towards EV equipment and one-time software costs. The total dollar amount paid in the form of Milestone Payments shall not exceed $375,000. Any remaining incentive funds committed for this project shall be paid after site's completion and receipt of a final paid invoice.

5.4 Applicants Meeting Jump Start Criteria

While EnergIIZE established the Jump Start funding lane with equity as its primary focus, there may be instances where applicants from another lane also meet similar criteria. If an applicant participates during a funding lane other than Jump Start but meets one or more of the criteria mentioned in Jump Start, that project may be eligible for the incentive structure outlined under Jump Start.

For instance, a transit district may have participated in state incentive vehicle programs and can produce a PO or proof of vehicle ownership, making them eligible for participation in the EV Fast-Track funding lane. If they are awarded funds during this funding lane, they would be eligible for EnergIIZE incentives covering 75% of equipment and one-time software costs (instead of 50%) and the increased project cap of $750 thousand (instead of $500 thousand).

Applicants for the Hydrogen Fueling Lane who meet one or more of the Jump Start criteria shall also be eligible to receive incentives covering 75% of equipment, but with a $3 million project cap.

6 Infrastructure Cost Eligibility

This section describes the types of ZEV infrastructure costs eligible for incentive funding through EnergIIZE and any specific criteria each must meet to be considered eligible. Costs for other necessary steps in the infrastructure development process may contribute substantially to total project cost. Unless otherwise stipulated in this implementation manual, EnergIIZE does not currently provide incentives towards costs outside of those outlined in the following section.

6.1 Soft Costs Eligible for EnergIIZE Incentives

Costs incurred prior and during the process of constructing an infrastructure site that do not directly go towards the purchase of equipment are considered soft costs. The soft costs eligible for incentives through EnergIIZE are limited to the following and an invoice is required for incentives to be dispersed:

- Labor costs related to construction paid at prevailing wage
- Architectural fees for infrastructure planning

Actual costs incurred towards either of the above two items are eligible for incentives and may not exceed the following caps:

- $2,500 per Level 2 plug
- $5,000 per DCFC plug

Applicants must provide invoices from past projects to prove labor costs are on par with market rates. The project caps for EV Jump Start remain the same.

NOTE ON APPLICANTS ELIGIBLE FOR INCENTIVES TOWARDS SOFT COSTS*: Applicants in the EV Jump Start funding lane are eligible for incentives towards soft costs. All other applicants are not eligible for incentives towards soft costs*.

6.2 Requirements for All Infrastructure Equipment

Regardless of whether equipment is used to fuel FCEVs or charge EVs, it must meet the following minimum criteria:

a. Must be new equipment installed for the first time. Resale units, rebuilt, rented, received from warranty insurance claims, or new parts installed in existing units are not eligible for incentives.

b. Infrastructure projects must, upon completion, include the ability to provide recharging or refueling to a MD/HD ZEV. Incentives are not available for those projects whose only installed equipment is make-ready equipment.
c. Must have at least a one-year warranty that begins the date final commissioning is completed. It is recommended that the owner / operator purchases an extended warranty from the OEM, but this is not required for this application. Costs incurred for extended warranties are not eligible for EnergIIZE incentives.
d. Must be compliant with NIST Handbook 130[13] and NIST handbook 44[14], where applicable.

6.3 Requirements for EV Charging Equipment

EV infrastructure projects must include deployment of chargers for MD/HD EVs and may include funding for panels, conduit, and wiring at the facility level as eligible for incentives. EV infrastructure projects may also include upgrades to customer-side distribution infrastructure, including meters and transformers, as incentive eligible equipment to support deployment of medium- and heavy-duty battery electric vehicles. *Incentives to support make-ready equipment are eligible only in instances where incentives are not offered through the utility.*

EnergIIZE Staff will make reasonable efforts to ensure an up-to-date listing of eligible equipment is available to all applicants interested in deploying MD/HD EV charging infrastructure. If a piece of EV charging equipment is listed on an approved equipment list of one of the three IOUs in California (SCE, PG&E, SDG&E), then it is considered eligible unless specifically indicated otherwise in this IM.

Costs incurred for the following EV infrastructure equipment are eligible for incentives:

- Electric vehicle supply equipment (EVSE), including Level 2 and Direct Current Fast-Chargers (DCFC)
- Transformers (in non-IOU territory)
- Switchgear, meter mains, and circuit breaker panels
- Utility service upgrades (e.g., amperage upgrades to infrastructure site)

[13] For more information, please see https://nvlpubs.nist.gov/nistpubs/hb/2018/NIST.HB.130-2018.pdf
[14] For more information, please see https://www.nist.gov/system/files/documents/2021/05/05/00-20-hb44-web-final_0.pdf

- Stub-outs
- Demand management equipment and software
- Third-party network providers

A note on software costs: EnergIIZE provides incentives for demand management equipment and the required software. Incentives for these eligible costs shall only be paid once, after site commissioning, and with the final invoices. *Monthly service fees are not eligible for incentives through EnergIIZE*.

A note on power levels: EnergIIZE provides incentives for both Level 2 and DCFC chargers. However, Level 2 EVSE and DCFC with power ratings lower than 150 kW are not eligible for incentives to those applying during the Public Charging funding lane.

In addition, EV charging equipment must meet the following criteria:

6.3.1 **Must be 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.

6.3.2 **Must facilitate vehicle-charger interoperability**. Eligible charging equipment shall utilize charging connectors and charging interfaces that are compatible for use with MD/HD vehicles sold by multiple original automotive equipment manufacturers for widespread use across California and North America. Such connectors/interfaces may include SAE J1772 CCS1, SAE J3105 or others. Eligible charging equipment shall be hardware-capable of ISO 15118-based high-level communication with vehicles using power line communication (PLC), Wi-Fi, or other physical layers identified in ISO 15118.

6.3.3 **Must leverage open standards-based network communications**. Eligible equipment shall be able to revert back to an open standard protocol as a basic framework for purposes of network interoperability.

It is recommended that charging equipment be Open Charge Point Protocol (OCPP v1.6 and later) compliant and be certified by the Open Charge Alliance (OCA). Any proprietary protocol may additionally be superimposed on the system, provided the site owner is able to revert to an open standard protocol, such as OCPP.

These functions and their associated design include:

6.3.3.1 Network connectivity (one of the following):

- 4G LTE cell phone Equipment with a 3 dB exterior mounted antenna.
- IEEE 802.3 for Ethernet for local- or wide- area network applications (requires an IP address and registered)
- IEEE 802.11n for high bandwidth wireless networking

6.3.3.2 Ability to receive remote software updates, real-time protocol translation, encryption, and decryption:

- Internet Protocol (IP)-based processor must support multiple protocols.
- Compliant with Transmission Control Protocol (TCP)/IP and IPv6.

6.3.3.3 Additional means of network communication are allowable and may include the following:

- Automated Demand Response (Open ADR, IEC 62746-10-1 ED1).
- Those outlined by the Smart Grid Interoperability Panel (SGIP) Catalog of Standards, the NIST Smart Grid Framework, the American National Standards Institute (ANSI), or other well-established international standards organizations such as the International Organization for Standardization (ISO), International Electrotechnical Commission (IEC), International Telecommunication Union (ITU), Institute for Electrical and Electronics Engineers (IEEE), or Internet Engineering Task Force (IETF).

6.3.4 **Must be capable of managing charging costs and supporting grid reliability**. Eligible charging equipment shall, leveraging the open standards-based network communications described above, be capable of receiving energy management signals (such as hourly prices and Flex Alerts obtained from CEC's MIDAS server or direct load controls) from an EVSP, EMS, or utility. Eligible charging equipment shall be capable of automatically adjusting charging load, subject to the constraints of NIST Handbook 44.

Charging equipment capable of electric vehicle grid integration (VGI)[15] is eligible for

[15] Eligible charging arrangements may utilize standards such as SAE J1715, UL 9741, and UL 1741 to enable the

incentives. VGI enables the overall optimization of energy consumption through altering the time or charging level of an EV connected to the electrical grid.

6.3.5 **Must be networked, capable of remote diagnostics and have the ability to remote start**. The network connection shall be determined by the site owner / operator and shall be consistent with the network connectivity requirements outlined above in Section 6.2.3, *Leverage open standards-based network communications*.

6.3.6 Must ensure that equipment pricing is reasonable, necessary, and reflects current market rates.

6.4 Requirements for Hydrogen Fuel Cell Vehicle Refueling Equipment

Hydrogen fuel cell vehicle refueling station projects must include deployment of high-pressure (350 bar or 700 bar) dispensers for eligible vehicles and may include funding for Compressors, Dispensers with hose and nozzles, high pressure storage, chilling equipment, and onsite hydrogen production to support current and future deployment of medium- and heavy-duty hydrogen fuel cell vehicles.

Hydrogen infrastructure projects may also include upgrades to customer-side distribution infrastructure, including meters and transformers, as incentive eligible equipment to support deployment of MD/HD FCEVs. *Incentives to support make-ready equipment are eligible only in instances where incentives are not offered through the utility.*

Hydrogen refueling equipment must meet the following criteria:

6.4.1 Certified to American Society of Mechanical Engineers (ASME), American Society for Testing and Materials (ASTM) and the National Fire Protection Association (NFPA) standards as required.

6.4.2 Must ensure that equipment pricing is reasonable, necessary, and reflects current market rates.

Costs incurred for the following hydrogen fuel cell vehicle refueling infrastructure equipment are eligible for incentives:

connection of MD/HD EVs to the electrical grid under coordinated, digital communication. A definition of VGI is codified in CPUC Code and further information can be found under the California Public Utilities Code 740.16(b): https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=PUC&sectionNum=740.16.&article=2.&highlight=true&keyword=vehicle+grid+integration

- Compressors
- Utility transformer (non-IOU service area)
- Switch gear, meter mains and circuit breaker panel
- Utility service upgrades (e.g., amperage upgrades to infrastructure site
- Liquid and gaseous hydrogen pumps
- Point-of-sale systems
- Piping and pipelines
- Dispenser with hose and nozzles
- Hydrogen storage
- Onsite hydrogen production
- Chillers

7 Infrastructure Vendor/Installer Eligibility

This section describes the requirements for eligibility of a business, organization, contractor, or individual that installs, inspects, commissions, constructs, designs, or otherwise provides aid, assistance, guidance, and/or consulting towards the completed installation of ZEV infrastructure equipment and services.

Eligible Vendors under EnergIIZE fall under two categories:

- **Approved Vendor**: May apply on behalf of a commercial fleet and manage the EnergIIZE application process for them. Approved vendors must be vetted by EnergIIZE staff and complete the Approved Vendor/Installer application (see Appendix K).
- **Preferred Vendor**: May install, commission, or otherwise aid in the completion of a ZEV infrastructure site. However, Preferred Vendors may NOT apply on behalf of the commercial fleet for whom they are providing infrastructure installation services.

7.1 Requirements for All Vendors/Installers:

7.1.1 Must 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).

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. National Fire Protection Association (NFPA) 70, electric code, and any other relevant codes or standards imposed by the Planning Department having jurisdiction.

e. California Health and Safety Code Section 25510(a).

7.1.2 Must meet prevailing wage requirements. Projects that receive an award of public funds from the CEC are likely to be considered public works under the California Labor Code. See Chapter 1 of Part 7 of Division 2 of the California Labor Code, commencing with Section 1720 and Title 8, California Code of Regulations, Chapter 8, Subchapter 3, commencing with Section 16000.

7.1.3 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 Disability Act (ADA) codes. For more information on ADA compliance, please reference: https://businessportal.ca.gov/wp-content/uploads/2019/07/GoBIZ-EVCharging-Guidebook.pdf (pg.31).

7.1.4 Must have secured all required state, local, county, and city permits to build and install eligible infrastructure.

7.1.5 Must ensure that pricing for services involved in the completion of infrastructure are reasonable, necessary, and reflects current market rates.

7.2 Requirements for Vendors/Installers of EV Infrastructure

7.2.1 Must comply with California Public Utilities Code (PUC) section 740.20[16] requiring all electric vehicle charging infrastructure and equipment located on the customer side of the electrical meter 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 Electric Vehicle Infrastructure Training Program (EVITP)[17] 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:

a. Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility.

b. Electric vehicle charging infrastructure funded by moneys derived from credits generated from the Low Carbon Fuel Standard Program[18] (Sub article 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).

7.3 Requirements for Vendors/Installers of Hydrogen Fuel Cell Vehicle Refueling Infrastructure

It is recommended that the vendor/installer take advantage of all resources available to them including the following: Center for Hydrogen safety (WWW.AICHE.ORG) and hydrogen tools portal for best practice and procedures: http://h2tools.org/.

Installer / Vendor shall complete a detailed property title search for zoning restrictions and requirements for Hydrogen refueling station. Once this study is complete, the vendor/installer shall complete a CEQA investigation and file the forms as required.

7.3.1 Must conform to the **most recent version** of the following

a. ANSI/CSA (formerly the Canadian Standards Association) Hydrogen Gas Vehicle (HGV) 4.3, Test Methods for Hydrogen Fueling Parameter Evaluation.

[16] For more information, please see https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB841

[17] For more information, please see https://evitp.org/training/

[18] For more information, please see https://ww2.arb.ca.gov/our-work/programs/low-carbon-fuel-standard/about

b. CSA Hydrogen Gas Vehicle (HGV) 4.9, Hydrogen Fueling Stations.
c. Compressed Gas Association (CGA) G-5.3, Commodity Specification for Hydrogen. https://portal.cganet.com/Publication/Details.aspx?id=G-5.3.
d. National Fire Protection Association (NFPA) 2, Hydrogen Technologies Code. And NFPA 55., ANd NFPA 2 Checklist (2016).
e. SAE International J2719 Hydrogen Fuel Quality for Fuel Cell Vehicles.
f. SAE International J2799 Hydrogen Surface Vehicle to Station Communications Hardware and Software., where required and as necessary.
g. California Building Code, Part 2, Title 24
h. California Electrical Code, Part 3, Title 24
i. California Energy Code, Part 6, Title 24
j. California Fire Code. Part 9, Title 24
k. The dispenser has been certified to sell hydrogen by the kilogram (pursuant to CCR Title 4, Division 9, Chapter 1)
l. The station is connected to the Station Operational Status System (SOSS), maintained by CaFCP.
m. Surface Streets Hydrogen Refueling Station Signage per NIST Handbook 130 and Caltrans Manual on Uniform Traffic Control Devices, section 21.03.

8 EnergIIZE Application Process

This section describes the application process for each of the four funding lanes. This application process and the documents required at each step are necessary regardless of whether the Applicant is applying as part of a competitive process, or first come, first served. Application materials pertaining only to one funding lane, such as hydrogen refueling, have been noted accordingly.

Interested parties will find the application and more information relating to participation in this incentive project on the EnergIIZE webpage. The following description includes required documentation for a complete application and timelines for reservation of funds, document submission, and milestone payments. Unless otherwise noted, applicants for each funding lane must complete each step as described below. For an application checklist, please see Appendix L.

Upon submission of an EnergIIZE application, the submission's timestamp will secure an applicant's place in line (for first come, first served applications). Applicants can return to their project proposals at any time to ask questions.

EnergIIZE staff recommend applicants and other stakeholders involved in the infrastructure planning, development, or construction process engage with the Infrastructure Readiness Center (IRC) which can be found through the EnergIIZE webpage, as well as a brief resource on site planning, installing, and commissioning in Appendix D of this manual.

Step 1: Submit EnergIIZE Application

The following section outlines requirements for initial EnergIIZE funding consideration. Funding lane and incentive offerings may be determined by an applicant prior to submitting an application by visiting the EnergIIZE website or by using the resources in this document. Regardless of funding lane, the applicant is required to provide the following for an application to be deemed complete:

a. **EnergIIZE Application Form** (See appendix XX). *In the event you intend to apply for incentives at a site which shall utilize **both** EV and hydrogen infrastructure, please contact EnergIIZE staff prior to your application window opening. Mixed fuel sites are not common, and therefore may require specific guidance from EnergIIZE Staff on how best to complete an application. Applicants will need to provide a qualitative narrative on certain aspects of their application. More information can be found within the application document.*
b. **Site Verification Form** (Appendix F) with proof of property ownership and/or authorization of installation work by the property owner. If new or upgraded equipment is provided by the utility, then proof of easement is required.
c. **Signed copy of EnergIIZE Terms and Conditions** (See Appendix E).
d. **Proof of participation in available utility programs** for make-ready funding, for projects in Investor-Owned Utilities (IOU) territories where such programs currently exist. Proof of participation in these programs may include but not be limited to:
    - Customer Agreement Form signed by the site operator

    Participation in such programs is not a prerequisite for participation in EnergIIZE. *However, foregoing participation does preclude a project from receiving any incentives towards make-ready through EnergIIZE.*

e. **Copy of the Request for New Service from the local utility** for those applicants applying for infrastructure outside of IOU make-ready program territories (e.g., email correspondence with the utility containing the ticketed request for new service).
f. **Site Equipment Manifest**: A list of anticipated one-time hardware and software costs to be incentivized through EnergIIZE funding. Details should include at least manufacturer, make, model, and MSRP.
g. For Hydrogen applicants only: Proof of completion of Critical Milestone 1 (see Appendix B).
h. For Fast Track applicants only: Proof of ownership or purchase orders for MD/HD ZEV(s) receiving state or federal incentives.
i. For Jump Start applicants only: Signed Vehicle Commitment agreement (Appendix J).
j. For EV Jump Start applicants and those applicants from other funding lanes who may be eligible for additional incentive funding: Documentation proving your status as one or more of those entities described under the EV Jump Start funding lane (See Appendix M).

In the event an applicant provides an application that is incomplete (e.g., missing signature, required documents not attached), EnergIIZE Staff will contact the applicant and inform them of the issue.

Once an application period closes, EnergIIZE staff will review all applications. In the case of EV Jump Start, EV Public Charging, and Hydrogen funding lanes, applications will also be scored on their completeness and the project's contribution to the community. The following criteria will be scored:

- Submission of all required application forms.
- Location – Prioritization will be given to proposed infrastructure which will be located within a CalEnviroScreen 4.0 Disadvantaged Community ("DAC") census tract, defined as the top 25% of census tracts based on their CalEnviroScreen 4.0 score. Proposed infrastructure to be located in a Low-Income Community census tract, as defined under AB 1550, will also be given priority.
- Tribal Projects – Prioritization will also be awarded to Tribal projects, which are defined as projects where the applicant is a California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities
- Benefit to the community – Applicants will be score based on their response

to two qualitative questions in the application form. EnergIIZE staff will award projects which demonstrate buy-in and support for infrastructure projects from the community, incorporate workforce development opportunities for local residents, expand transit service for local residents, and/or offer no-cost charging or fuel to local residents.

Notices of conditional award will then be sent to those applicants who underwent a competitive application process. This award letter can be seen as confirmation of reserved funding for an applicant's infrastructure project.

If the above requirements have been met, then funds shall be reserved across all applicant categories consistent with incentive structure outlined in this implementation manual.

Step 2: Receives Award Letter and Confirmation of Funding

Once applicants have been provided with their notice of conditional award, they will then have 60 days to provide the following information. Applicants in the Jump Start funding lane who were provided a notice of conditional award will have 90 days to provide the same information.

a. **Proof of cost share** and supporting documentation to demonstrate coverage of total project funds. The first page of this document must include the Cost Share Cover Sheet (Appendix G) and subsequent attachments shall include but not be limited to:
   - Disclosure of all public funding sources awarded.
   - Demonstrated proof of cost coverage for any non-incentivized project costs. The sum of make-ready funding, self-contributions, other external funding sources, and potential EnergIIZE incentive funds must be clearly shown as meeting (though not exceeding) total project costs.

b. **Preliminary site plans**. An example of preliminary site plans can be found in Appendix I.

c. **Proof of license, insurance, and EVITP certification** (for EVSE projects only) of the general contractor selected for the project.

d. **Copy of Purchase Order** for EVSE's or hydrogen equipment.

e. For Hydrogen projects only: Copy of the hydrogen safety plan (see Appendix A) and proof of completion of Critical Milestone 2 (see Appendix B).

Step 3: Project Planning

Once the project receives a building permit, the applicant must submit the following:

a. **Copy of the building permit**.
b. **Project plan and scope of work** including construction timeline.
c. **Copy of original CEQA filing**. For more information on CEQA filings as it pertains to installation of ZEV infrastructure, see Appendix H.
d. For Hydrogen projects only: Proof of completion of Critical Milestone 3 (see Appendix B).

At this stage, projects may be eligible for milestone payment(s) for costs incurred. Milestone payments shall not equal more than 50% of the Applicant's notice of conditional award.

Step 4: Project Construction

Once a project has secured all the necessary permits, the planning department requirements have been satisfied, and construction has been completed but prior to final commissioning, the applicant must submit the following:

a. **Copy of the signed inspections sheet and closed building permit**.
b. **Photo of serial number for all serialized equipment installed** on the project site. Serial number must match that on project invoices.
c. **Photographic evidence of the site**. This may include: All EVSE's or hydrogen pumps installed; switch gear and meter mains; transformers; compressors and pumps, landscaping as required by the property owner, ADA parking with proper markings, signs, and placards with path of travel; ingress and egress properly marked (signs per HB 130).
d. For Hydrogen projects only: Proof of completion of Critical Milestone 4 (see Appendix B).

At this stage, projects may be eligible for milestone payment(s) for costs incurred.

Step 5: Site Commissioning and Final Invoice Submission

Once a project's construction is complete and proof of power or fuel at the site has been confirmed, site commissioning should commence. Applicants must provide the following documentation as proof of commissioning, receive any incentives for which they may be

eligible, and close out their project:

a. Copy of third-party network provider communications contract.
   - 4G cell phone activation and IP registration completed.
b. **Verification that chargers / refueling dispensers are in working order**.
c. For EVSE's: Completed RSA certification of Level 2 EVSE (where necessary).
d. **Provide copies of final invoices** and indication that no further outstanding balance exists.

At this stage, the project should be complete and fully operational. Upon completion of the steps above, an applicant's project is deemed complete and no further responsibilities on the part of the applicant remain, besides those explicitly listed under duties and responsibilities pertaining to data collection.

9 Duties and Responsibilities:

9.1 EnergIIZE Approved Applicant Responsibilities (EV and Hydrogen)

9.1.1 Must be a business, non-profit, or government entity based in California.

9.1.2 Must have their infrastructure project (as defined by this Implementation Manual) fully reside within the state boundaries of California.

9.1.3 For Jump Start applicants: must provide a signed Vehicle Commitment Agreement (Appendix J).

9.1.4 For Jump Start applicants: must provide proof of their status as an eligible entity for the EV Jump Start funding lane (Appendix M).

9.1.5 Must comply with all local, state, and federal safety, permitting, zoning, and other guidelines.

9.1.6 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 applicant or any other party, the applicant must notify EnergIIZE staff.

9.1.7 Must submit reports and respond to surveys put forth bi-annually by EnergIIZE staff for a period of three years from the date of final commissioning.

9.1.8 Must report delays in a timely manner to EnergIIZE staff that may place the applicant's project at risk of significant delays or cancellation.

9.1.9 Must be available for follow-up inspection if requested by EnergIIZE staff, CEC, or CEC's designee.

9.1.10 Must ensure the connected EV or hydrogen equipment shall be maintained and operated for a period of no less than five (5) years from the date of final commissioning.

9.1.11 Must disclose all sources of public funding used in combination with EnergIIZE funds. A special note for participants in the Carl Moyer Program: Participants in the Carl Moyer Program are not eligible to claim LCFS credits through EnergIIZE due to the restrictions signed by the participants of the Carl Moyer Program.

9.2 EnergIIZE Approved Applicant Responsibilities (Hydrogen)

The following describes the duties and responsibilities for those pursuing incentive funding for hydrogen fuel cell vehicle refueling stations:

9.2.1 Must commit to develop a Hydrogen Safety Plan for each proposed hydrogen refueling station (See Appendix A).

9.2.2 Must submit proof of completion for all four Hydrogen Refueling Station Critical Milestones for successful project completion (See Appendix B).

9.3 EnergIIZE Vendor/Installer Responsibilities (EV and Hydrogen)

9.3.1 Must have reviewed the EnergIIZE requirements for participation and have participated in any training offered by EnergIIZE Staff.

9.3.2 Must abide by any federal, State, and local laws and regulations applicable to their infrastructure project.

9.3.3 Must provide accurate and complete documentation of all eligible ZE infrastructure equipment, and other documents where requested.

9.3.4 Must complete the required forms and applications as stipulated in the application process portion of this document, in the event said vendor is the Applicant.

9.4 EnergIIZE Vendor/Installer Responsibilities (EV)

9.4.1 Must ensure the project has complied with all AB 841 (2020) requirements or provide notice to EnergIIZE staff why the AB 841 requirements do not apply to the project.

9.4.2 Must submit EVITP Certification Numbers of each Electric Vehicle Infrastructure Training Program certified electrician that installed electric vehicle charging infrastructure or equipment. EVITP Certification Numbers are not required to be submitted if AB 841 requirements do not apply to the project.

9.5 EnergIIZE Vendor/Installer Responsibilities (Hydrogen)

9.5.1 The site owner and/or general contractor must apply for a permit with the local AHJ for

the installation of a pressure vessel.

9.5.2 The employees of the general contractor and the general contractor must have been trained in or certified to the following standards and regulations:

a. OSHA regulations as published in Title 29 of the Code of Federal Regulations. Part 1910 covers general industry regulations.

b. Compressed Gas Association (CGA) "S", Pressure relief devices and CGA H-5: safety standard for bulk hydrogen supply systems

c. ASME B 31 - 2020 for piping and pipelines

9.6 Data Collection Requirements

Each Project's site operator must provide a minimum of three years of data collection on deployed infrastructure equipment, reported bi-annually. Site operators shall pursue automated approaches to reporting said data for accuracy of reporting and streamlined processing for all parties involved. Data collected shall include but not be limited to:

EV Recharging

- Total cost, including incentive dollars, for the EV infrastructure project
- Peak power (in kW) and energy delivered (in kWh).
- Applicable price for charging, including but not limited to; electric utility tariff, EVSP service contract, or public charger price, AND date and time
- Payment method
- Types of vehicles using the charging equipment (make/model if known)
- Number of unique vehicles and frequency of "repeat vehicles"
- Weekly and monthly Average charging session durations
- Average kWh purchased (based on monthly utility bills)
- Average kWh dispensed (e.g., energy management system reports)
- Maintenance and repairs performed
- Average charger station uptime

Hydrogen Refueling

- Refueling session duration
- Hydrogen delivered in kilograms (kg) per fueling event
- Amount of hydrogen purchased (kg)

- Cost of H2 fuel either delivered to site, onsite development or at public refueling station.
- Monthly cost of electricity ($/kWh) and power delivered to the station (kW)
- Types of vehicles using the refueling equipment (make/model)
- Number of unique vehicles and frequency of “repeat vehicles”
- Total number of fueling events per DAY including date and times
- Total hydrogen delivered to vehicles per month (kg)
- Maintenance and repairs performed
- Average refueling equipment uptime

Appendix A – Hydrogen Safety Plan and Station Design Review

The Applicant must prepare (a) preliminary Hydrogen Safety Plan(s) for the Pacific Northwest National Laboratory Hydrogen Safety Program (PNNL HSP) to review. It is up to the Applicant to work directly with the PNNL HSP to submit the Applicant's preliminary Hydrogen Safety Plan to the PNNL HSP. If the Applicant wishes the plan to be kept confidential by the HSP, it is up to the Applicant to work with the HSP to achieve that. The PNNL HSP is expected to assess the preliminary Hydrogen Safety Plan(s) for adherence to the most recent version of public guidelines titled Safety Planning for Hydrogen and Fuel Cell Projects, available at:

https://h2tools.org/sites/default/files/Safety_Planning_for_Hydrogen_and_Fuel_Cell_Projects.pdf. This link also provides a sample Hydrogen Safety Plan for review and reference by the Applicant.

The Applicant shall include the following in the Hydrogen Safety Plan:

1. A detailed description about how the Applicant will adhere to the most recent public guidelines throughout the life of all the stations. Should the Applicant's adherence with the public guidelines or its Hydrogen Safety Plan(s) lapse, without limitation to any other rights, EnergIIZE Staff reserves the right to cancel the Applicant's agreement funded by this incentive project.

2. A detailed description about how the Applicant will conform to the NFPA 2, Hydrogen Technologies Code 2020 edition. Should a locale accept NFPA 2, Hydrogen Technologies Code 2016 instead, the Applicant shall so state and shall conform to the 2016 edition until which time the AHJ requires compliance with the 2020 edition. Should the Applicant's compliance lapse, EnergIIZE Staff reserves the right to cancel the Applicant's agreement funded by this incentive project.

3. A detailed description about how the Applicant will provide ongoing safety training for the station's initial operation and safety retraining for all station operators over the life of each station. Should the training lapse, without limitation to any other rights, EnergIIZE Staff reserves the right to cancel the Applicant's agreement funded by this incentive project.

The Applicant shall ensure PNNL HSP forward their non-confidential assessment of the preliminary Hydrogen Safety Plan to EnergIIZE Staff. The Applicant shall prepare a *final* Hydrogen Safety Plan following the PNNL HSP assessment. As with the preliminary Hydrogen

Safety Plan, it is up to the Applicant to work directly with the PNNL HSP to submit the Applicant's final Hydrogen Safety Plan to the PNNL HSP. If the Applicant wishes the plan to be kept confidential by the HSP, it is up to the Applicant to work with the HSP to achieve that.

Should the Applicant opt to not accept all the comments from the PNNL HSP assessment, the Applicant shall provide an explanation of their rationale to EnergIIZE staff in as part of their *final* Hydrogen Safety Plan. The Applicant shall commit to participate with the PNNL HSP in early hydrogen station design reviews for each station awarded, before submitting the station building plans to the AHJ for the station "plan check."

The Applicant shall also commit to participate in annual safety evaluations with the PNNL HSP for three years after each station becomes open.

Should the Applicant cease participating in PNNL HSP design and annual reviews, without limitation to any other rights, EnergIIZE Staff will reserve the right to cancel any agreement funded by this solicitation.

Appendix B – Hydrogen Fueling Station Critical Milestones

Should an applicant pursuing incentives be deemed eligible for participation in EnergIIZE, they must submit proof of having completed the following Critical Milestones. EnergIIZE incentives will not be awarded for a hydrogen refueling station unless the applicant meets all four Critical Milestones outlined below.

Critical Milestone 1: The Applicant (for station address submitted with the application) must have control and possession of the site or provide proof of an easement agreed to and signed by the property owner at which the hydrogen refueling station is to be constructed.

The Applicant must provide to EnergIIZE Staff proof of having met this Critical Milestone by submitting adequate documentation of site control and possession. Documentation of site control and possession may include, but is not limited to, an executed lease for the land on which the station will be constructed. EnergIIZE staff will determine whether the documentation submitted by the Applicant is sufficient to show that this Critical Milestone has been met.

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

9.6.1 An in-person, telephone, or web-based pre-application meeting for permits to build and operate each proposed hydrogen refueling station with the 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 refueling station(s), the entitlement and permit application process, zoning requirements, aesthetics, the AHJ's CEQA process, and project timeline. The meeting may be, for example, a scheduled presentation given by the Applicant to an AHJ, or an unscheduled discussion with AHJ staff.

9.6.2 An in-person, telephone, or web-based pre-application meeting, at the same time or separately from the meeting with the AHJ regarding permits, and with a representative of the Office of the Fire Marshal, or other similar fire control office, in the 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.

9.6.3 A telephone or web-based meeting with a representative of the PNNL HSP to establish a common understanding of the Hydrogen Safety Plan and station design review process that will be required of Applicants.

The Applicant must provide to the EnergIIZE 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. EnergIIZE staff will determine whether the documentation submitted by the Applicant or Applicant is sufficient to show that this Critical Milestone has been met.

Critical Milestone 3: 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. 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.

Critical Milestone 4: 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.

In the event the Applicant is pursuing on-site hydrogen generation to meet some or all their demand, the Applicant must provide proof to EnergIIZE staff that said on-site equipment will adequately serve the demand by submitting site plans, spec sheets, and developer assurances that said installation shall adequately serve the demand of each proposed dispenser at that station.

Appendix C – Site Planning, Installing, and Commissioning

The planning process for deploying ZEV infrastructure involves collaboration across several stakeholders including utilities, general contractors, and state government staff. Before starting the process of engaging with these stakeholders, it is important to understand the various stages your project may go through before any construction is performed.

Project planning may include:

1. Review and approval of site plans
2. Preparation of construction drawings and documents
3. Permit application
4. Electric vehicle supply equipment specifications review
5. Electric vehicle supply equipment testing and approval
6. Installation contractor's approval
7. Project schedule review and approval
8. Payment system set-up and field testing
9. Signage Plan review and approval
10. Maintenance & Inspection Plan review and approval
11. Installation & Commissioning

Installation may include:

1. Obtaining city permit
2. Hiring installation subcontractors
3. Site preparation including concrete cutting and trenching
4. Running the electrical and communication conduit
5. Concrete pouring
6. Forming and pouring of reinforced concrete foundations for the sites
7. Pre-installation inspection of cement
8. Electric service upgrades including circuit breakers, panels, and safety disconnect and transformers
9. Negotiation with Utility over power provision
10. Installation of ZEV infrastructure equipment (e.g., EVSE, hydrogen compressor, etc.)
11. Signage, placards, and labels per NIST HandBook 130
12. Lighting per local codes
13. Final inspection and approval
14. Network commissioning
15. Final testing with a zero-emission vehicle

Final commissioning may include:

1. Check and validate radio frequency identification cards
2. Check the internet communication between a charging station and the central server

3. Turn on, charge/refuel, and test an EV of hydrogen fuel cell vehicle
4. Check the app (where applicable). Validate the sign-up and login as a new customer
5. Test the automatic switch-off in response to a major fault
6. Test the charging session in the case of a minor fault
7. Test the remote system control and monitoring system
8. Test the charging/refueling session and display of state of charge on a test EV or display of hydrogen fuel level on a test fuel cell vehicle.

Appendix D – Equipment Vendor/Installer Terms & Conditions

Equipment Manufacturer, Developer, and/or Installer
Effective Date: Month/Day/Year

1. I have read, understand, and agree to all provisions in the EnergIIZE Implementation Manual;
2. The information represented on all forms submitted to EnergIIZE staff as part of my application are true and correct;
3. I understand that after an incentive request is submitted, the end-user cannot be changed;
4. I agree to seek pre-approval from the EnergIIZE Staff on the inclusion of new equipment for approval if not included on the Site Equipment Manifest;
5. I agree to be available for a follow-up inspection by EnergIIZE staff, or their designee, if requested;
6. I acknowledge 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;
7. 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. I further acknowledge that the failure to do so may result in delayed payment;
8. I agree to keep written records of the equipment purchase for three (3) years after the purchase date and provide EnergIIZE Staff or its designee with these records within ten days of their request. These records include but are not limited to the equipment invoice, proof of purchase, equipment payment information and related bank records, and purchaser information;
9. I understand that any EnergIIZE incentive request is only valid for the specific purchaser and piece of equipment, and that any incentive provided based on this request will be null and void if the purchaser and equipment identified herein change prior to reimbursement or for noncompliance with applicable EnergIIZE requirements;
10. I agree to keep my Incentive Processing Center account, and any shared accounts, active while I have unredeemed incentives, for the three (3) years after project commissioning during which time EnergIIZE staff may request for survey feedback;
11. I have the legal authority to participate in EnergIIZE for the Vendor described in this agreement;
12. I understand that any information submitted may be subject to public requests for information and that the name of my organization and eligible equipment may be publicly listed as an EnergIIZE vendor;

13. I understand that EnergIIZE Staff reserves all rights and remedies available under the law to enforce the terms of this agreement.
14. By signing this EnergIIZE Incentive Request 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 under penalty of perjury that the information provided is accurate.

Name of Vendor (company/organization name):	
Name of Seller Representative:	
Signature of Representative:	
Date:	

Appendix E – EnergIIZE Applicant Terms & Conditions

Incentive Applicants
Effective Date: Month/Day/Year

As a condition for participating in the Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE) Project, the incentive applicant must comply with the requirements below:

1. I have read, understand, and agree to all provisions in EnergIIZE Implementation Manual;

2. I agree to maintain equipment insurance as required by law;
    a. Applicant ensures 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 EnergIIZE Staff with satisfactory evidence of this insurance at any time it may be requested.
    b. If Applicant 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 EnergIIZE Staff satisfactory evidence of this insurance at any time EnergIIZE Staff may request.

3. I assure that equipment purchased with an EnergIIZE incentive, including electric vehicle charging and hydrogen refueling equipment, will be utilized for the charging, or fueling of Class 2b – Class 8 commercial vehicles;

4. I agree to ensure equipment purchased with an EnergIIZE incentive, including electric vehicle charging and hydrogen refueling equipment, will be operated as recommended by the manufacturer to ensure durability and efficiency;

5. I agree to ensure equipment purchased with an EnergIIZE incentive, including electric vehicle charging and hydrogen refueling equipment, will be maintained as recommended by the manufacturer and as needed to prolong the equipment lifetime;

6. I agree to provide access to charging/fueling equipment for the intended commercial fleet or the public at the agreed upon location;

7. I understand that the equipment must be in compliance and remain in compliance with all applicable federal, state, and local air quality rules and regulations; furthermore, I understand that EnergIIZE Staff reserves the right to check compliance at any time;

8. I agree to operate this equipment in California for a minimum of five years from the date of deployment, unless given explicit prior written approval from EnergIIZE Staff.

9. I agree to partner with any Vendor 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 Vendor requests an incentive on my behalf;

10. When the incentive has been received by the Vendor; and in any instance wherein the inventive is cancelled for any reason. I will notify voucherprocessing@tetratech.com if a different person should receive these messages instead;

11. I agree to keep written records of the equipment purchased for three years after the purchase date and provide EnergIIZE Staff or its designee with these records within ten days of their request. These records include but are not limited to the equipment invoice, proof of purchase, equipment payment information and related bank records, and purchaser information;

12. I agree to complete the semi-annual usage survey and questionnaire for three years after the commissioning of my project, as requested by EnergIIZE Staff;

13. I agree that all information associated with this incentive request, including business name and address, contact information, and sales transactions are public information and subject to release;
    a. I understand that this information will also be shared with geographically relevant utility provider(s) for the purposes of infrastructure planning and incentive coordination;

14. I agree to disclose all sources of public funding that apply to the purchase of any equipment for which I request EnergIIZE incentives;

15. I agree to the Manufacturers Terms and Conditions for usage of the equipment;

16. I agree to be available for a 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;

17. I assure the State that the incentive applicant complies 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;

18. I assert that all projects receiving funds through an EnergIIZE incentive comply with the payment of prevailing wages;

19. I acknowledge 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 present ineligible costs on any invoice submitted;

20. 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. I further acknowledge that the failure to do so may result in delayed payment;

21. I agree to retain all project reimbursement 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 funding agreement. These records include but are not limited to the equipment invoice, proof of purchase, equipment payment information and related bank records, and purchaser information;

22. The information provided in this application is true and all supporting documentation is true and correct and meet the minimum requirements of EnergIIZE;

23. I have the legal authority to apply for incentive funding for the purchasing entity described in this agreement;

24. I commit to ensuring that connected EV or hydrogen equipment is operated and managed for a period of no less than five (5) years from the date of final commissioning.

25. I agree that failure to comply with the terms of this agreement may result in repayment of incentive funds received to EnergIIZE Staff;

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

27. I understand that EnergIIZE Staff reserves all rights and remedies available under the law to enforce the terms of this agreement;

28. I acknowledge that EnergIIZE Staff may at any time, by written order, make changes within the EnergIIZE Implementation Manual to affect future inventive rollout. Any such changes will not cause an increase or decrease in the estimated cost of, or the time required for, completion of the project under this agreement.

Does this incentive request represent your organization's first zero-emission infrastructure purchase?
☐Yes ☐No

If you answered yes to the question above, have you contacted your utility service provider?
☐Yes ☐No

- If you are not sure which utility service provider is relevant to your project, refer click your location on this map: https://gis.data.ca.gov/documents/CAEnergy::electric-utility-service-area/explore

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 under penalty of perjury that the information provided is accurate.

Applicant Organization:	
Name of Applicant or Authorized Representative:	
Signature of Representative:	
Date:	

Appendix F – EnergIIZE Site Verification Form

Site Verification Form

EnergIIZE Commercial Vehicles Project Applicants that do not own the property where the proposed installation site is located, must provide authorization, to the satisfaction of EnergIIZE Staff that the installation work is authorized by the property Owner and the Applicant. Each Owner and each Applicant must complete, sign, and submit this form to EnergIIZE Staff. EnergIIZE Staff reserve the right to require that Applicant and Owner provide such further information as may be required to review and approve an Applicant's application.

EnergIIZE Commercial Vehicles promotes the acceleration of zero-emission medium- and heavy-duty vehicle adoption through incentives for electric vehicle recharging and hydrogen fuel cell refueling equipment and associated software. For more information about EnergIIZE or how to participate, please visit www.EnergIIZE.org.

APPLICANT. Please complete as follows:	
Applicant/Organization Name:	Enter Applicant/Org. Name
Applicant Project ID:	Enter Applicant ID.
Installation Site Address:	Enter Address
City: Enter City State: Enter StateZip Code:Enter 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: Print Name	Title:Click or tap here to enter text.
Date:	Click or tap to enter a date.

PROPERTY OWNER (landlord). Please complete as follows:	
The undersigned, on behalf of Click or tap here to enter text. ("Owner"), hereby represents and warrants to EnergIIZE Staff (i) that Owner is the property Owner located at Click or tap here to enter text. ("Property"); (ii) that Owner has consented to Applicant'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.	
Installation Site Address:	Enter Address
City: Enter City State: Enter State Zip Code:Enter Zip Code	
Signature of Property Owner or Representative of Property Owner:	
Print Name: Print Name	Title: Click or tap here to enter text.
Date:	Click or tap to enter a date.

Appendix G – EnergIIZE Cost Share Cover Sheet

Cost Share Cover Sheet

Proof of cost share and supporting documentation is required for participation in EnergIIZE. This supplemental information may include such documents as notices of proposed award, notice of grant award, and other official documentation indicating an award of funding. Please use the table below to outline total proposed project costs and attach to this cover sheet supporting documentation including but not limited to:

- Disclosure of all public funding sources awarded.
- Demonstrated proof of cost coverage for any non-incentivized project costs. The sum of make-ready funding, self-contributions, other external funding sources, and potential EnergIIZE incentive funds must be clearly shown as meeting (though not exceeding) total project costs.

Funding Source	Funding Amount
Funding Source 1	Amount of Funding
Funding Source 2	Amount of Funding
Funding Source 3	Amount of Funding

Funding Disclosure Subtotal: _____

Total Proposed Project Cost: _____

Appendix H – Information on CEQA

California Environmental Quality Act

The California Environmental Quality Act (CEQA) is 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. Users can also see a comprehensive overview of CEQA here.

Overview of CEQA Process

Step 1: Do any Exemptions Apply?

- Statutory Exemptions: Created by the Legislature, generally not subject to CEQA.
- Categorical Exemptions: Created through regulatory processes.
- Notice of Exemption (NOE): Contains several elements, will be filed after project approval, and trigger a 35-day statute of limitations for challenging. Online Form

Step 2: Initial Study

- The purpose of an Initial Study is to determine if the project will result in a significant environmental impact.
- If the project does not fall under any exemptions, the public agency will undertake an initial study. This generally includes a report by the city or county which holds primary jurisdiction.

Step 3: Appropriate Level of Review

- Depending on Step 2, Step 3 will result in:
    - A Negative Declaration: No significant environmental impact, Environmental Impact Report not required.
    - A Mitigated Negative Declaration: Conditions attached to a project that will mitigate any potential environmental hazards.
    - An Environmental Impact Report: The project will result in significant environmental impacts, and a more extensive report is required. For more information, please visit What is an EIR and/or Overview of the CEQA Process

If the above steps 1 and/or 2 results in a CEQA exemption form, no further actions are needed. However, if the above steps 1 and/or 2 result in the need for an Environmental Impact Report, please contact your EnergIIZE administrator to communicate this change.

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) WORKSHEET

The California Environmental Quality Act (CEQA) (Public Resources Code §§ 21000 et seq.) requires public agencies to identify the significant environmental impacts of their actions and to avoid or mitigate them, if feasible.[19] Under CEQA, an activity that may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment is called a "project." (Public Resources Code § 21065.) Approval of a contract, grant, or loan may be a "project" under CEQA if the activity being funded may cause a direct physical change or a reasonably foreseeable indirect physical change in the environment. Agencies must comply with CEQA before they approve a "project." This can include preparing a Notice of Exemption or conducting an Initial Study and preparing a Negative Declaration, a Mitigated Negative Declaration, or, if there are significant impacts, an Environmental Impact Report.

The Lead Agency is the public agency that has the greatest responsibility for preparing environmental documents under CEQA, and for carrying out, supervising, or approving a project. Where the award recipient is a public agency, the Lead Agency is typically the recipient. Where the award recipient is a private entity, the Lead Agency is the public agency that has greatest responsibility for supervising or approving the project as a whole.[20] When issuing contracts, grants or loans, the Energy Commission is typically a "Responsible Agency" under CEQA, which means that it must make its own CEQA findings based on review of the Lead Agency's environmental documents. If the Energy Commission is the only public agency with responsibility for approving the project, then the Energy Commission must act as the Lead Agency and prepare its own environmental documents before approving the project.

This worksheet may help EnergIIZE participants determine what kind of CEQA review, if any, is necessary. Please answer all questions as completely as possible. It may also help you to think through the CEQA process necessary for your proposed project.

1. **What are the physical aspects of the project? (Check all that apply and provide brief description of work, including any size or dimensions of the project).**

Type of Project	Yes	No	Project Description
Construction (including grading, paving, etc.)	☐	☐	
Trenching	☐	☐	
New or replaced pipelines	☐	☐	
Modification or conversion of a facility	☐	☐	
New or modified operation of a facility or equipment	☐	☐	

[19] For a brief summary of the CEQA process, please visit http://ceres.ca.gov/ceqa/summary.html.
[20] 14 C.C.R. §§ 15050, 15051. The Lead Agency typically has general governmental powers (such as a city or county), rather than a single or limited purpose (such as an air pollution control district).

On-road demonstration	☐	☐	
Paper study (including analyses on economics, feedstock availability, workforce availability, etc.)	☐	☐	
Laboratory research	☐	☐	
Temporary or mobile structures (skid-mounted)	☐	☐	
Design/Planning	☐	☐	
Other (describe and add pages as necessary)	☐	☐	

2. Where is the project located or where will it be located? (Attach additional sheets as necessary.)

Address	County	Type of Work to Be Completed at Site

3. Will the project potentially have environmental impacts that trigger CEQA review? (Check a box and explain for each question.)

Question	Yes	No	Don't Know	Explanation
Is the project site environmentally sensitive?	☐	☐	☐	
Is the project site on agricultural land?	☐	☐	☐	
Is this project part of a larger project?	☐	☐	☐	

Is there public controversy about the proposed project or larger project?	☐	☐	☐	
Will historic resources or historic buildings be impacted by the project?	☐	☐	☐	
Is the project located on a site the Department of Toxic Substances Control and the Secretary of the Environmental Protection have identified as being affected by hazardous wastes or cleanup problems?	☐	☐	☐	
Will the project generate noise or odors in excess of permitted levels?	☐	☐	☐	
Will the project increase traffic at the site and by what amount?	☐	☐	☐	

4. Will the project require discretionary permits or determinations, as listed below?

Type of Permit	No	Modified	New	Approving Agency	Reason for Permit, Summary of Process, and Anticipated Date of Issuance
Air Quality Permit	☐	☐	☐		
Water Quality Permit	☐	☐	☐		
Conditional Use Permit or Variance	☐	☐	☐		
Building Expansion Permit	☐	☐	☐		
Hazardous Waste Permit	☐	☐	☐		

Rezoning	☐	☐	☐		
Authority to Construct	☐	☐	☐		
Other Permits (List types)	☐	☐	☐		

5. Of the agencies listed in #4, have you identified and contacted the public agency who will be the lead CEQA agency on the project?

☐ **Yes**. Provide the name of and contact information for the lead agency.

_____
_____
_____
_____
_____

☐ **No.** Explain why no contact has been made and/or a proposed process for making contact with the lead agency.

_____
_____
_____
_____
_____
_____

6. Has the public agency prepared environmental documents (e.g., Notice of Exemption, Initial Study/Negative Declaration/Mitigated Negative Declaration, Environmental Impact Report, Notice of Determination) under CEQA for the proposed project?

☐ **Yes**.
Please complete the following and attach the CEQA document to this worksheet. (For "Not a project," the title of the document may be an e-mail, resolution, or letter.)

Type of Environmental Review	Title of Environmental Document	State Clearinghouse Number	Completion Date	Planned Completion Date (must be before approval of award)
"Not a project"		N/A		N/A

Exempt (Resolution of public agency or Agenda Item approving Exemption)		N/A		N/A
Exempt (Notice of Exemption)		N/A		
Initial Study				
Negative Declaration				
Mitigated Negative Declaration				
Notice of Preparation				
Environmental Impact Report				
Master Environmental Impact Report				
Notice of Determination				
NEPA Document (Environmental Assessment, Finding of No Significant Impact, and/or Environmental Impact Statement)				

☐ **No**. Explain why no document has been prepared. Propose a process for obtaining lead agency approval and estimated date for that approval (must occur before the Energy Commission will approve the award).

_____
_____
_____
_____
_____
_____

Certification: I certify to the best of my knowledge that the information contained in this worksheet is true and complete. I further certify that I am authorized to complete and sign this form on behalf of the proposing organization.

Name: _____

Title: _____

Signature: _____

Phone Number: _____

Email: _____

Date: _____

Local Health Impacts Information

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

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

INSTRUCTIONS

Please complete the following information *for the site(s) of the proposed project that will require a permit*. Attach additional pages if necessary. If the project includes multiple sites, you may submit this information in a table format using the bolded font below as column headers.

PROJECT NAME

APPLICANT'S NAME AND ORGANIZATION PROJECT SITE(S) DESCRIPTION

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

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

DEMOGRAPHIC DATA

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

- Total population
- Median education level
- Unemployment rate
- Percentage of minorities (by ethnicity)
- Percentage of population falling under the poverty level
- Percentage of population under 5 years and over 65 years of age

Suggested sources: Census Data, www.census.gov; city website, local economic development department, Employment Development Department Labor Market Information Data Division

Cite your data sources including name of data source, date of data

PROJECT-GENERATED EMISSIONS

Provide a quantified description of the air emissions (criteria and toxic) directly associated with the project's operations, including, but not limited to: 1) transport of fuel, feedstock or other material to

project site as required for operations and production; 2) production of fuel or technology components; 3) fueling of alternatively fueled vehicles.

Additionally, for this solicitation, please provide a description of any new equipment being installed and the emissions directly associated with the operation of this equipment. The following emissions should be included in your emissions analysis (where applicable):

- *Criteria Air Pollutants*- NO2, PM (2.5), PM (10), SO2, Lead, NOx, H2S,
- *Toxic Air Emissions*- Formaldehyde, Diesel Particulate Matter, Benzene, 1,3 Butadiene, Acetaldehyde

PROJECT HEALTH IMPACTS

Using the demographic data and emissions information, provide a description of the project's potential localized health impacts. For this section, "potential localized health impact" denotes the project's potential to add criteria pollutants and toxic air contaminants to a localized air shed and affect ambient air quality levels to an extent that local community health is adversely affected.

PROJECT SUMMARY

Provide the page number in the proposal that describes the project goal and proposed infrastructure changes.

Provide estimate of environmental benefits and/or impacts from the proposed project.

OUTREACH EFFORTS

Describe outreach efforts to be implemented throughout the project to educate the surrounding community of these benefits and/or impacts. Include method of outreach (e.g., flyer, townhall meeting), frequency of outreach, number of targeted stakeholders, and information to be provided.

ELECTRIC VEHICLE CHARGING STATION INSTALLATION

CITY OF AUBURN

MAGNOLIA AVE & TENNIS WAY
AUBURN 95603

APN 002-122-013-000

USA NORTH 811 Call 811 Before You Dig

CALL 811 OR 800-642-2444
MINIMUM 2 WORKING DAYS WITH A MAXIMUM OF 14 CALENDAR DAYS

GENERAL SYMBOLS AND ABBREVIATIONS

SYMBOL	DESCRIPTION
	MAIN SWITCHBOARD
	COMMERCIAL LEVEL 2 ELECTRIC VEHICLE CHARGING STATION
	CIRCUIT CONCEALED IN CEILING OR WALL, EXPOSED IN SERVICE AREAS
	CIRCUIT CONCEALED IN FLOOR OR UNDERGROUND
	HOMERUN TO PANELBOARD
	INDICATES FLEX CONDUIT
	TRANSFORMER
	PULL BOX
C	CONDUIT
BLDG	BUILDING
MSB	MAIN SWITCHBOARD
PNL	PANELBOARD
(E)	EXISTING
(N)	NEW
(R)	EXISTING TO BE REMOVED OR RELOCATED
UON	UNLESS OTHERWISE NOTED
WP	WEATHERPROOF--WHILE IN USE IN WET LOCATIONS WHERE APPLIED TO RECEPTACLES

SHEET LIST

SHEET NUMBER	SHEET TITLE
C1.0	COVER SHEET – SYMBOLS, CODE REFERENCES, SCOPE, GENERAL NOTES
E1.0	ONE LINE DIAGRAM, PANEL SCHEDULE(S), AND VOLTAGE DROP CALCULATIONS
E2.0	SITE PLAN
E3.0	EQUIPMENT DATASHEETS AND MECHANICAL DETAIL
E4.0	EQUIPMENT DATASHEETS, CONTINUED

CODE REFERENCES

2019	CALIFORNIA ELECTRICAL CODE	
2019	CALIFORNIA ENERGY CODE	
2019	CALIFORNIA FIRE CODE INCLUDING 2016 NFPA 72 (NATIONAL FIRE ALARM CODE) AS AMENDED	
2019	CALIFORNIA BUILDING CODE (CBC), PARTICULARLY CH. 11A AND 11B FOR ACCESSIBILITY	
2010	ADA/ABA	
2017	ANSI A117.1	ZONING N/A (CITY PARKING LOT)
OCCUPANCY – N/A (EXTERIOR)		AREA OF BUILDING – N/A

SCOPE

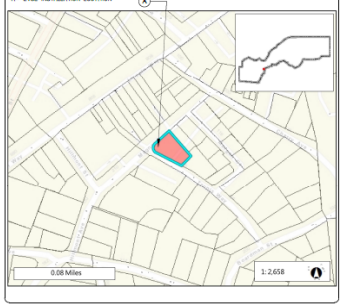
CONVERT (2) EXISTING PARKING SPACES TO (1) NEW VAN ACCESSIBLE EV CHARGING SPACE, COMPLETE WITH NEW POWER PEDESTAL, PAINT, SIGNAGE, AND INSTALLED PER ADA REGULATIONS.
INCLUSIONS:
ALL CONDUIT AND WIRING FOR THE INSTALLATION OF NEW EVSE
(1) CHARGEPOINT EXPRESS 250 DC FAST CHARGING STATION (CPE250C-625-CCS1-CHD)
(1) 400A, 277/480V, 3PH, METERED SWITCHGEAR
(N) UNDERGROUND PULL BOX WITH CONDUITS FOR FUTURE EVSE
(N) PG&E TRANSFORMER, INSTALLED BY OTHERS

GENERAL NOTES

1. ALL WIRES SHALL BE COPPER WITH 600V TYPE THHN/THWN OR XHHW INSULATION.
2. ALL WIRING SHALL BE IN CONDUIT OR WEATHER PROOF FLEX.
3. CONDUIT SHALL BE EMT FROM 4'-5" AND ABOVE, RIGID STEEL WHERE SUBJECT TO PHYSICAL DAMAGE OR AS NOTED. CONDUIT BELOW GRADE SHALL BE SCH 40 PVC OR AS NOTED.
4. COAT EXPOSED THREADS OF RIGID STEEL CONDUIT WITH ZRC COLD GALVANIZING COMPOUND TO PREVENT CORROSION.

VICINITY MAP – NOT TO SCALE

A= EVSE INSTALLATION LOCATION



REVISIONS	BY
0 INITIAL RELEASE	SH
1 CITY CORRECTIONS	SH

PHIL HAUPT ELECTRIC
LICENSE # 1026340
5098 FOOTHILLS BLVD
SUITE 3-358
ROSEVILLE, CA 95747

THIS IS A DESIGN-BUILD PROJECT AND THE WORK SHOWN ON THESE PLANS HAS BEEN DESIGNED AND WILL BE INSTALLED BY PHIL HAUPT ELECTRIC, INC. REFERENCE 2019 CBC & BUSINESS AND PROFESSIONS CODE SECTION 6737.3.

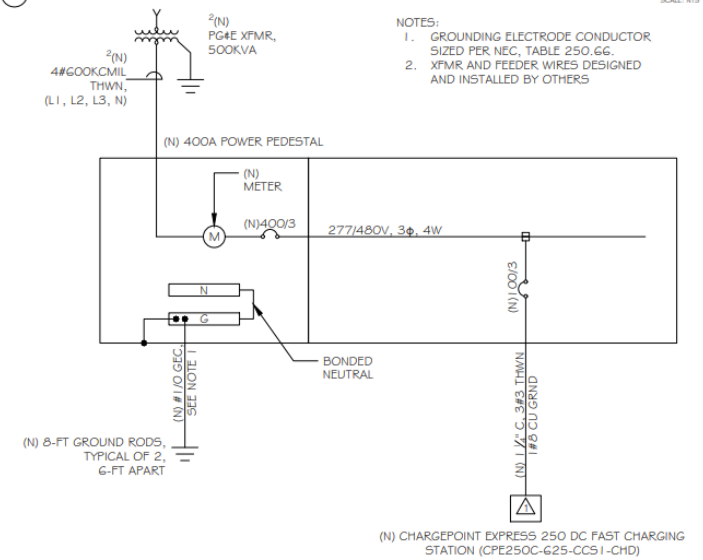
PHIL HAUPT ELECTRIC 1026340 C-10 STATE OF CALIFORNIA

ELECTRIC VEHICLE CHARGING STATION INSTALLATION
CITY OF AUBURN
MAGNOLIA AVE & TENNIS WAY
AUBURN 95603

DATE 7/1/20
SCALE AS NOTED
DRAWN SH
JOB CITY OF AUBURN
SHEET C1.0
1 OF 5

1 ONE LINE

SCALE: NTS



NOTES:
1. GROUNDING ELECTRODE CONDUCTOR SIZED PER NEC, TABLE 250.66.
2. XFMR AND FEEDER WIRES DESIGNED AND INSTALLED BY OTHERS

(N) CHARGEPOINT EXPRESS 250 DC FAST CHARGING STATION (CPE250C-625-CCS1-CHD)

2 VOLTAGE DROP CALCULATION

SCALE: NTS

VOLTAGE DROP WORKSHEET [SUPPLEMENT TO FORM NRCC-ELC-01-E (REFERENCE DOCUMENT #1)]

VD = I x L x (CIRCUIT FACTOR*) x OHMS/KLF / 1000 x # CONDUCTORS/PHASE

*CIRCUIT FACTOR = 1.73(3P) AND 2 (1P)

CIRCUIT	KVA	VOLTS	PHASE	AMPS	1-WAY CIRCUIT LENGTH (FEET)	WIRE SIZE	COND/ PHASE	A/C OHMS/ KLF	VOLTS DROP	%V.D.	% ALLOWED
EV #1	62500	480	3	75.2	10	#3	1	0.24	0.31	0.07	5

3 PANEL SCHEDULE

SCALE: NTS

PANEL 'EV' **DESCRIPTION: POWER PEDESTAL** **AIC RATING: 10,000A** **ENCLOSURE: NEMA-3R** **MOUNTING: GROUND-MOUNT** **SUPPLY FROM: UTILITY**

SERVICE: 277/480V, 3PH, 4W + G **SUPPLY FROM: SERVICE UTILITY** **MAINS: 400A BUS**

POLE	LOAD DESCRIPTION	*	CB	CONNECTED-VA	PH	CONNECTED-VA	CB	*	LOAD DESCRIPTION	POLE
1					A	20,833				2
3					B	20,833	100/3	C	EV CHARGER 1	4
5					C	20,833				6
7					A					8
9					B					10
11					C					12
13					A					14
15					B					16
17					C					18

PHASE TOTALS

PHASE	VA	AMPS
A-N	20,833.3	75.2
B-N	20,833.3	75.2
C-N	20,833.3	75.2

LOAD SUMMARY (VA @ 208V)

	CONNECTED	DESIGN FACTOR	DESIGN (VA)	DESIGN (AMPS)
NON-CONTINUOUS LOADS	-	100%	-	-
CONTINUOUS LOADS	62,500	125%	78,125	94
OTHER	-	100%	-	-
TOTAL	62,500		**78,125**	**94**

*C=CONTINUOUS LOAD (>3 HRS PER NEC 100), M = MOTOR, N = NON-CONTINUOUS, P = SUBPANEL, R = RECEPTACLE

REVISIONS	BY
0 INITIAL RELEASE	SH
1 CITY CORRECTIONS	SH

PHIL HAUPT ELECTRIC
LICENSE # 1026340
5098 FOOTHILLS BLVD
SUITE 3-358
ROSEVILLE, CA 95747

THIS IS A DESIGN-BUILD PROJECT AND THE WORK SHOWN ON THESE PLANS HAS BEEN DESIGNED AND WILL BE INSTALLED BY PHIL HAUPT ELECTRIC, INC. REFERENCE 2019 CBC & BUSINESS AND PROFESSIONS CODE SECTION 6737.3.

ELECTRIC VEHICLE CHARGING STATION INSTALLATION
CITY OF AUBURN
MAGNOLIA AVE & TENNIS WAY
AUBURN 95603

DATE 7/1/20
SCALE AS NOTED
DRAWN SH
JOB CITY OF AUBURN
SHEET E1.0
2 OF 5

1 FULL SITE PLAN

Scale: 0.005372

ADA NOTES:

A. INSTALLATION COMPLIES WITH THE 2019 CALIFORNIA BUILDING CODE (CBC) ACCESSIBILITY REQUIREMENTS, PARTICULARLY CHAPTER 11B SECTIONS 228.2 AND 812.

B. PROVIDE NEW ADA ACCESS AISLE. THE WORDS "NO PARKING" TO BE PAINTED ON THE SURFACE WITHIN THE ACCESS AISLE IN CONTRASTING LETTERS 12" IN HEIGHT. STRIPING TO BE PAINTED IN WHITE 4" THICK AND A MAXIMUM OF 36" O.C., PER CBC 11B-812.7.2. VEHICLE SPACES AND ACCESS AISLES SERVING THEM SHALL COMPLY WITH SECTION 11B-302. ACCESS AISLES SHALL BE AT THE SAME LEVEL AS THE VEHICLE SPACE THEY SERVE. CHANGES IN LEVEL, SLOPES EXCEEDING 1:48, AND DETECTABLE WARNINGS SHALL NOT BE PERMITTED IN VEHICLE SPACES AND ACCESS AISLES, PER 11B-812.3.

C. "EV CHARGING ONLY" LETTERING ON PARKING SPACES TO BE PAINTED IN WHITE 12 INCHES IN HEIGHT.

D. 30" X 48" MINIMUM CLEAR GROUND SPACE, PER CBC 11B-305.3.

E. PER CBC 11B-812.5.4, VEHICLE SPACES AND ACCESS AISLES SHALL BE DESIGNED SO THAT PERSONS USING THEM ARE NOT REQUIRED TO TRAVEL BEHIND VEHICLE SPACES OR PARKING SPACES OTHER THAN THE VEHICLE SPACE IN WHICH THEIR VEHICLE HAS BEEN LEFT TO CHARGE.

F. PER CBC 11B-309.4, "GAS PUMP NOZZLES AND ELECTRIC VEHICLE CONNECTORS SHALL NOT BE REQUIRED TO PROVIDE OPERABLE PARTS THAT HAVE AN ACTIVATING FORCE OF 5 POUNDS (22.2 N) MAXIMUM. REACH RANGES SHALL COMPLY WITH FORWARD REACH AND SIDE REACH REQUIREMENTS, PER 11B-308".

G. WHERE EV SPACES AND ACCESS AISLES ARE MARKED WITH LINES, MEASUREMENTS SHALL BE MADE FROM THE CENTERLINE OF THE MARKINGS, PER CBC 11B-812.1.

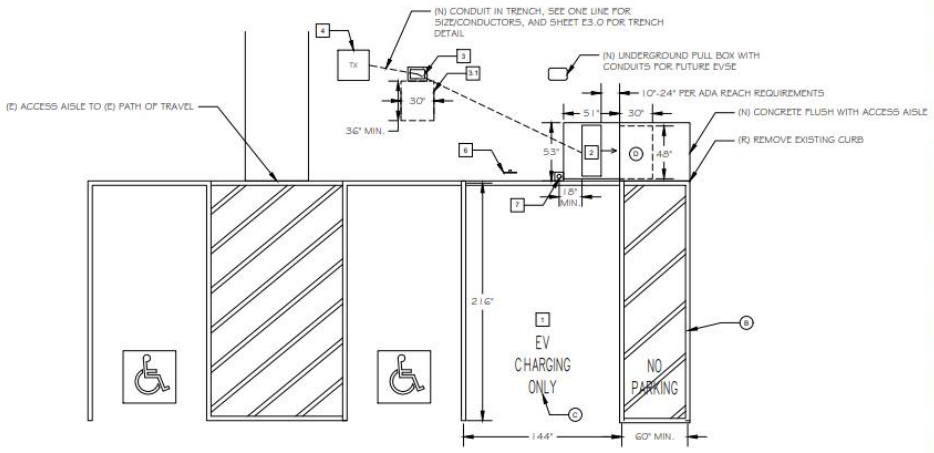
H. VEHICLE SPACES, ACCESS AISLES SERVING THEM, AND VEHICULAR ROUTES SERVING THEM SHALL PROVIDE A VERTICAL CLEARANCE OF 98 INCHES MINIMUM. WHERE PROVIDED, OVERHEAD CABLE MANAGEMENT SYSTEMS SHALL NOT OBSTRUCT REQUIRED VERTICAL CLEARANCE. CBC 11B-812.4

INSTALLATION NOTES:

1. CONVERT TWO EXISTING PARKING SPACES TO NEW VAN ACCESSIBLE EVCS SPACE, COMPLETE WITH ACCESS AISLE AND SIGNAGE. REFER TO DETAIL 1 FOR DIMENSIONS. REFER TO 2019 CALIFORNIA BUILDING CODE (CBC) CHAPTER 11B SECTIONS 228.3 AND 812 FOR ACCESSIBILITY REQUIREMENTS.
2. (N) CHARGEPOINT EXPRESS 250 DC FAST CHARGING STATION (CPE250C-625-CCS1-CHD) ON (N) 51" X 51" CONCRETE PAD, 2" MAX. ABOVE TOP OF GRADE.
3. (N) POWER PEDESTAL ON (N) CONCRETE PAD. SEE PAD DETAIL ON SHEET E3.0 AND SPECIFICATIONS ON SHEET E4.0.
   3.1. POWER PEDESTAL WORKING CLEARANCE OF 36" MINIMUM REQUIRED IN FRONT, PER NEC 110.26.
4. (N) PG&E TRANSFORMER, INSTALLED BY OTHERS.
5. CONTRACTOR TO PROVIDE TRENCHING OR DIRECTIONAL BORING AS APPROPRIATE FOR NEW UNDERGROUND CONDUITS TO POWER PEDESTAL. CONTRACTOR TO FIELD ROUTE ON SITE, PATH SHOWN ON DRAWING FOR DEMONSTRATION OF CONCEPT. CONTRACTOR SHALL PERFORM UTILITY LOCATE SERVICE PRIOR TO COMMENCEMENT OF WORK. CALL 811 BEFORE DIGGING.
6. PROVIDE POLE MOUNTED EV AND VAN ACCESSIBLE SIGNAGE. REFER TO SHEET E3.0 FOR SIGNAGE REQUIREMENTS.
7. (N) 4"Ø STEEL BOLLARD IN CONCRETE FOR MECHANICAL PROTECTION.

2 NEW EV PARKING SPACE LAYOUT

Scale: 1/4" = 1'-0"



REVISIONS	BY
0 INITIAL RELEASE	SH
1 CITY CORRECTIONS	SH

PHIL HAUPT ELECTRIC
LICENSE # 1026340
5098 FOOTHILLS BLVD
SUITE 3-358
ROSEVILLE, CA 95747

THIS IS A DESIGN-BUILD PROJECT AND THE WORK SHOWN ON THESE PLANS HAS BEEN DESIGNED AND WILL BE INSTALLED BY PHIL HAUPT ELECTRIC, INC. REFERENCE 2019 CBC & BUSINESS AND PROFESSIONS CODE SECTION 6737.3.

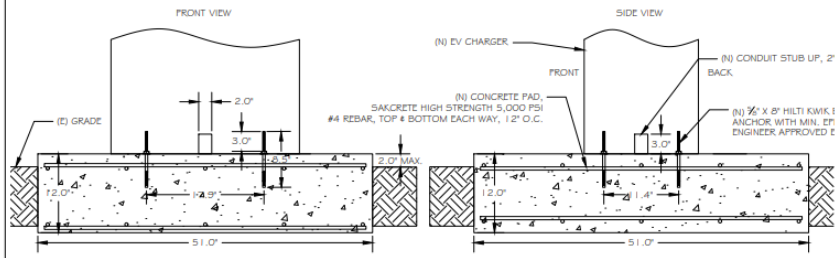
1026340 C-10

ELECTRIC VEHICLE CHARGING STATION INSTALLATION
CITY OF AUBURN
MAGNOLIA AVE & TENNIS WAY
AUBURN 95603

DATE 7/1/20
SCALE AS NOTED
DRAWN SH
JOB CITY OF AUBURN
SHEET E2.0
3 OF 5

1 EV CHARGER ANCHOR DETAIL

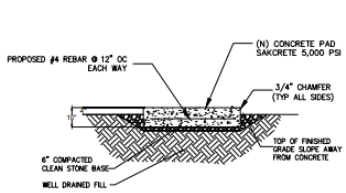
Scale: NTS



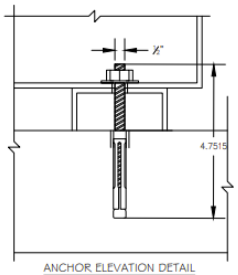
NOTE:
1. EV CHARGING STATION WEIGHT: 551 LBS
2. USE CONCRETE MOUNTING TEMPLATE INCLUDED WITH EVCS FOR ANCHOR BOLTS
3. THE SERVICE CLEARANCE OF OPEN SPACE (NOT NECESSARILY AT SYSTEM GRADE) EXTENDS A MINIMUM OF 24" BEYOND THE STATION IN FRONT, 50" TOTAL FRONT TO BACK, 84.8" SIDE TO SIDE CENTERED ON THE STATION, AND 12" ABOVE THE STATION.

2 POWER PEDESTAL CONCRETE ANCHOR DETAIL

Scale: NTS



PAD SIDE VIEW
(SEE SITE PLAN FOR AERIAL DIMENSIONS)

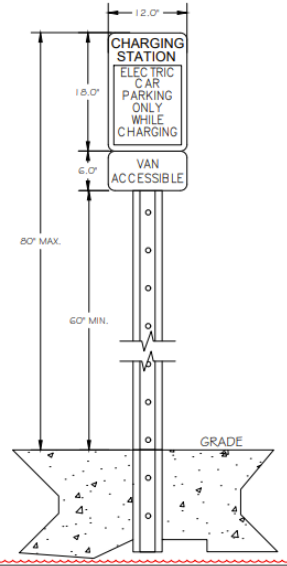


ANCHOR ELEVATION DETAIL

NOTES:
1. SEE SITE PLAN FOR CONCRETE PAD DIMENSIONS.
2. SEE RESPECTIVE TRANSFORMER AND/OR SWITCHGEAR ASSEMBLY DRAWINGS FOR MOUNTING HOLE LOCATIONS.
3. ½" Ø HILTI KWIK BOLT TZ SS 304/316 MECHANICAL ANCHOR WITH MIN. EFFECTIVE EMBEDMENT OF 3¼", OR ENGINEER APPROVED EQUAL (ESR #1917)

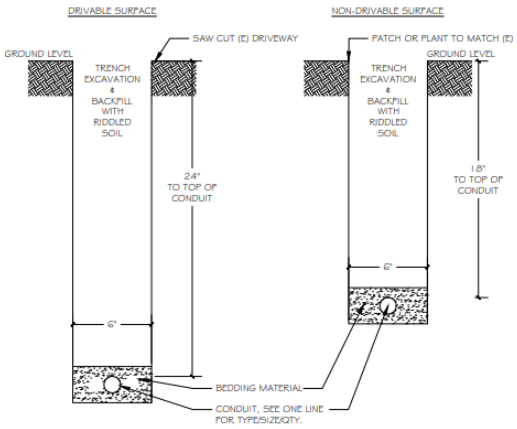
3 SIGNAGE FOR VAN ACCESSIBLE EVCS PARKING SPACE

Scale: 1:8



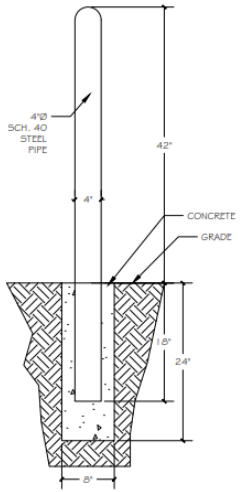
4 TRENCH DETAIL

Scale: NTS



5 BOLLARD DETAIL

Scale: NTS

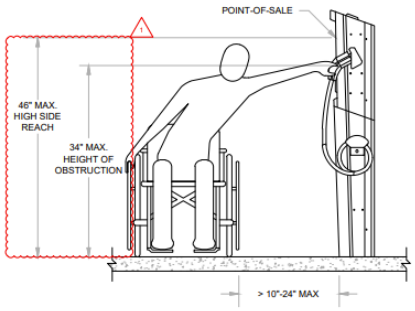


6 ADA REACH REQUIREMENTS

Scale: NTS

NOTE:

OPERABLE PARTS SHALL BE OPERABLE WITH ONE HAND AND SHALL NOT REQUIRE TIGHT GRASPING, PINCHING, OR TWISTING OF THE WRIST. FORCE REQUIRED TO ACTIVATE OPERABLE PARTS SHALL BE 5 POUNDS MAXIMUM PER CBC 11B-309.4.



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0 INITIAL RELEASE	SH
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PHIL HAUPT ELECTRIC
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REGISTERED PROFESSIONAL ENGINEER PHIL HAUPT ELECTRIC 1026340 C-10 STATE OF CALIFORNIA

ELECTRIC VEHICLE CHARGING STATION INSTALLATION
CITY OF AUBURN
MAGNOLIA AVE & TENNIS WAY
AUBURN 95603

DATE	7/1/20
SCALE	AS NOTED
DRAWN	SH
JOB	CITY OF AUBURN
SHEET	E3.0
	4 OF 5

Revision Date: December 16, 2021

Appendix J – Vehicle Commitment Agreement

EnergIIZE MDHD Vehicle Commitment Agreement

The purpose of this agreement is to document the applicant's commitment to purchase a qualifying vehicle. A qualifying vehicle is defined as any battery electric or hydrogen fuel cell vehicle Class 2B and greater according to the Federal Highway Administration (FHWA).

Commercial Fleet Point of Contact:	
Organization/Company Name:	
Organization Type:	
Mailing Address:	
City:	
State:	
Zip Code:	
Primary E-mail:	
Phone:	
Tax ID Number:	
Infrastructure Site Address: (If diff. from mailing address above)	

MDHD Vehicle Information (Please fill in the required information below.)

	Vehicle Model 1	Vehicle Model 2	Vehicle Model 3	Vehicle Model 4
Expected Date of Purchase:				
Make:				
Model:				
Description:				
Number to be purchased:				
Total Cost Per Model:				
Total Cost:				
Date Application was Submitted:				
Name of Commercial Fleet Operator/Manager:				
Signature of Commercial Fleet Operator/Vehicle Owner				
Title of Signer:				
Date:				

By signing the EnergIIZE MDHD Vehicle Commitment Agreement, I acknowledge that I will purchase a qualifying vehicle, as defined above, by the expected date of purchase indicated above. I acknowledge that I have read and understand, and agree to be bound by, the terms and conditions as outlined above. I certify under penalty of perjury that the information provided is accurate. **Please email complete application packet to: infrastructure@calstart.org**

Appendix K – Approved Vendor/Installer Application Form

EnergIIZE Approved Vendor/Installer Application Form

Vendor/Installer Information

Your Name: (Last, First) Click or tap here to enter text.		Vendor/Installer Name: Click or tap here to enter text.
Your Preferred Name (if different from above): Click or tap here to enter text.		Vendor/Installer Parent Company (if applicable): Click or tap here to enter text.
Vendor/Installer CSLB License Number: Click or tap here to enter text.		How long has your organization held this license? Click or tap here to enter text.
Mailing Address: Click or tap here to enter text.		
City: Click or tap here to enter text.	State: Click or tap here to enter text.	ZIP Code: Click or tap here to enter text.
Email Address: Click or tap here to enter text.		
Phone and Fax: Click or tap here to enter text.		Vendor/Installer Tax ID #: Click or tap here to enter text.
Does this vendor/installer provide services for EV charging or hydrogen refueling? ☐ EV Charging ☐ Hydrogen Refueling ☐ Both		
Is this vendor currently on a California investor-owned utility's list of approved installers/network providers? ☐ Yes ☐ No If yes, please state which utility: Click or tap here to enter text.		
For EV charging vendors/installers: Does this vendor/installer employ EVITP-certified electricians? ☐ Yes ☐ No *Note that all EnergIIZE projects require that 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.*		
List all EnergIIZE-Eligible Technologies sold through this vendor/installer (if any). You may choose to include these in an attachment or on subsequent pages: 1. Click or tap here to enter text. 2. Click or tap here to enter text. 3. Click or tap here to enter text.		
Does your organization currently employ or contract with other EnergIIZE Vendors? If so, please provide names: 1. Click or tap here to enter text. 2. Click or tap here to enter text. 3. Click or tap here to enter text.		
Please provide proof of this vendor/installer's State of California vendor and/or business license(s). Attach documents where applicable.:		

Please provide proof of this vendor/installer's insurance or bond (for self-insured businesses). Attach documents where applicable:
Please provide the name of the insuring body for your business:
Has this vendor/installer received any past Workers' Compensation claims? ☐ Yes ☐ No If yes, please explain: Click or tap here to enter text.
Please describe this vendor's quality program or process: Click or tap here to enter text.
Please provide appropriate references for similar EVSE or hydrogen fueling projects in the space below. You may also choose to include these in an attachment or on subsequent pages. Click or tap here to enter text.
How did you hear about EnergIIZE? Click or tap here to enter text.

Appendix L – EnergIIZE Application Document Checklist

Application Process	LANE	DOCUMENTATION REQUIRED FOR PROOF
Proof Required to Participate in Lanes	EV Fast Track	Electric vehicle purchase order or proof of ownership
	EV Jump Start	Electric vehicle commitment agreement (we will provide template, require electronic signature)
		Appropriate forms stating certification as one of these entities or self-certified where needed
	Public Charging	Location supports corridor charging
		Demonstrates business case for MD/HD charging energy and throughput
	Hydrogen	Equipment manifest
1. Submit Application	All Lanes	Site Verification Form- to authorize builds on leased land. If new or upgraded equipment is provided by the utility, then proof of Easement is required.
		EnergIIZE Application
		Proof of Utility Make-Ready, where applicable
		Copy of request for new service (local utilities)
		Site Equipment Manifest
		Signed Terms and Conditions
	EV Fast Track	Vehicle PO or proof of ownership
	Hydrogen	Proof of completion of Critical Milestone 1
2. Funds Reserved	All Lanes	Cost Share Form- with total project cost estimate, disclosure of other public funding to be used, and share applicant intends to pay
		Preliminary Site Plan
		General contractor: proof of license, insurance, EVITP for EVSE's only
		Copy of Purchase Order for EVSE's or hydrogen equipment
	Hydrogen	Copy of the preliminary hydrogen safety plan and proof of completion of Critical Milestone 2
	EV Jump Start	Signed Vehicle Commitment Agreement
3. Project Planning	All Lanes	Copy of the building permit
		California Environmental Qualify Assessment Filing (CEQA)
		Start construction: Date, time, pictures
	Hydrogen	Copy of final hydrogen safety plan and proof of completion of Critical Milestone 3.
4. Project Construction	All Lanes	Copy of Signed inspections sheet and closed building permit
		Pictures showing: Installed EVSEs; switch gear and meter mains; transformers; ADA parking with proper markings, signs, placards with path of travel; ingress and egress properly marked (signs per HB 130)
	Hydrogen	Proof of completion of Critical Milestone 4
5. Project Commissioned	All Lanes	Copy of Third-party network provider communications contract
		Verification of Refueling/Charging
		For EVSE's: RSA certification of level 2 EVSE completed (where necessary)
6. Remaining Funds Released	All Lanes	Copies of all invoices are submitted

Appendix M – EV Jump Start Certification Form

Applicants must demonstrate their status as an equity applicant if they are applying for additional incentives or if they are applying through the EV Jump Start lane. Where applicable, use one of the approved methods of self-certification listed.

Check the box next to the category(ies) below for which your fleet applies 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.

Technical assistance is available to applicants who need support in putting together the required documentation.

☐ **Applicant is a small business 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 Small Business (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.

☐ If applicant has more than $15 million annual revenue, then they are 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 the applicant's 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 the applicant's certification as a Disadvantaged Business Enterprise (DBE) from CALTRANS, the US Department of Transportation, or another DBE Certifying Agency. Certification must be current.
- ☐ For applicants who meet 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 this criteria. Narratives are limited to a maximum of 500 words.

☐ **Applicant is a Public Transit Agency installing infrastructure in a designated Disadvantaged Community**, defined as having a CalEnviroScreen 4.0 score in the top 25%, or in a Low-Income Community, as defined by AB 1550. Attached is documentation of one of the following:

- ☐ The address of the infrastructure to be built using EnergIIZE funds that is located within a Disadvantaged Community or Low-Income Community census tract.

☐ For transit agencies that primarily serve Disadvantaged Communities and/or Low-Income Communities but are proposing infrastructure to be located outside of a Disadvantaged Community and/or Low-Income Community census tract, a self-certification narrative, written on agency letterhead, that documents that at least 50% of the transit agency's ridership lives in Disadvantaged Communities and/or Low-Income Communities. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy this criteria. Narratives are limited to a maximum of 500 words.

☐ **Applicant is a Public School District installing infrastructure in a designated Disadvantaged Community**, defined as having a CalEnviroScreen 4.0 score in the top 25%, or in a designated Low-Income Community, as defined by AB 1550 and/or a School District serving greater than 50% of students served by the school district are Free and Reduced-Price Meals students. Attached is documentation of one of the following:

☐ The address of the infrastructure to be built using EnergIIZE funds that is located within a Disadvantaged Community census tract.

☐ A self-certification narrative, written on agency letterhead, that documents that at least 50% of the students served by the school district are eligible for free or reduced price meals. EnergIIZE staff reserves the right to ask for follow-up information as needed to satisfy this criteria. Narratives are limited to a maximum of 500 words.

☐ **Applicant is 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(c)(3) Determination Letter from the IRS.

☐ **Applicant is a non-profit organization that qualifies for tax-exempt status with the Internal Revenue Service under Internal Revenue Code Section 501(c)(3)**. Attached is the applicant's 501(c)(3) Determination Letter from the IRS.

☐ **Applicant is installing infrastructure in a designated Disadvantaged Community**, defined as having a CalEnviroScreen 4.0 score in the top 25%, or in a Low-Income Community, as defined by AB 1550. The address of the infrastructure to be built using EnergIIZE funds that is located within a Disadvantaged Community or Low-Income Community census tract.