

**DOCKETED**

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<b>Project Title:</b>	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)
<b>TN #:</b>	245360
<b>Document Title:</b>	CALSTART Comments - EnergIIZE EV Jump Start Application Process Overview Workshop Slides and Recording
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<b>Filer:</b>	System
<b>Organization:</b>	CALSTART
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*Comment Received From: CALSTART  
Submitted On: 8/18/2022  
Docket Number: 21-TRAN-04*

## **EnergIIZE EV Jump Start Application Process Overview Workshop Slides and Recording**

EnergIIZE Commercial Vehicles Project EV Jump Start Application Process Overview slide deck below from August 11, 2022 presentation.

A recording of the workshop is viewable at the link below.  
<https://youtu.be/0oaJo1AQDkU>

*Additional submitted attachment is included below.*



## **EnergiZE Workshop**

Application Process  
Electric Vehicle (EV) Jump Start

August 11, 2022

# EnergIIZE Commercial Vehicles

Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles  
*Accelerating fueling infrastructure deployment for zero-emission trucks, buses, and equipment*

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# Zoom Logistics

## Webinar URL:

<https://us06web.zoom.us/j/84111872288?pwd=a3lJeGlzcnRtNDFUTXRGdVo1YjBJZz09>

**Webinar ID:** 841 1187 2288

**Passcode:** 562237

## Mobile:

+16694449171,,84111872288# US

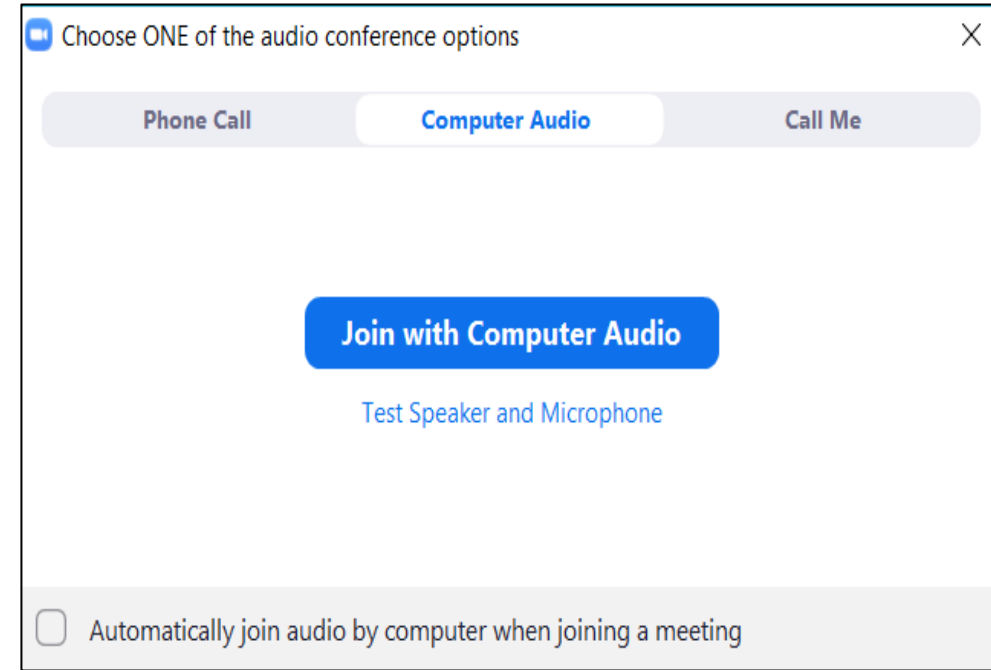
+16699006833,,84111872288# US (San Jose)

## Dial by your location

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

If you dial-in from a phone, use the meeting ID and passcode from invite



All participants (web and dial-in) are automatically in listen-only mode.

All participants will be unable to share their video.

If you have questions, you can use the chat function. You may send messages to the whole meeting or individual participants.

# Agenda

**1** Overview

**2** Eligibility

**3** Walkthrough of EnerglIZE EV Jump Start Application Process

1. *Submit EnerglIZE Application*
2. *Provide Supporting Documents*
3. *Plan Project*
4. *Initiate Construction*
5. *Commission Project*

**4** Q&A



# Overview



EV Jump Start Funding Lane  
Opening September 1 – 30, 2022

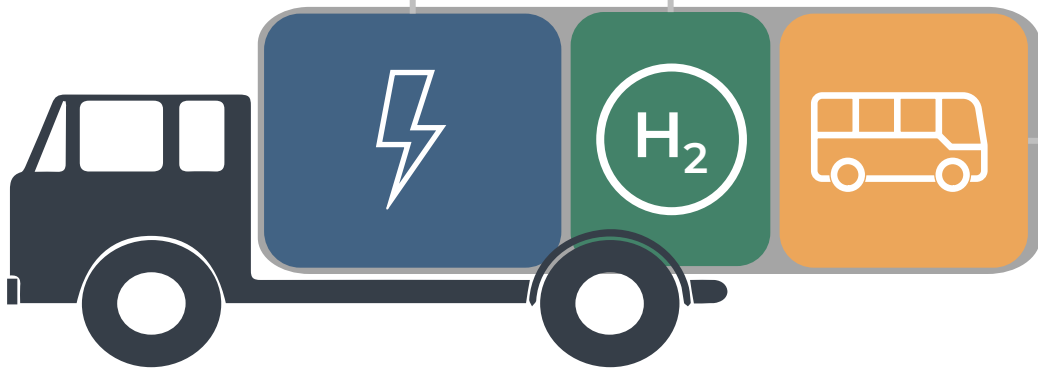
# Overview of EnerglIZE

## Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles

Provides \$69M in financial incentives to increase the deployment of commercial zero emission medium- and heavy-duty (MD/HD) vehicle infrastructure.

Prioritizes equity and community involvement while making incentives available to a wide audience by offering assistance and support.

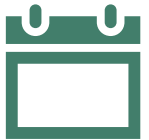
Funded by the California Energy Commission's (CEC) Clean Transportation Program.





# EV Jump Start Funding Lane

EV Jump Start is one of four funding lanes under EnergIIZE. The application process is competitive and applications are scored on criteria demonstrating project readiness, cost effectiveness, and community benefit.



## When can I apply?

- Funding window opens Sept 1 – 30, 2022.



## What is covered?

- 75% of Eligible Costs Incurred (see Section 6 of the [Implementation Manual](#)).
- Project cap of \$750,000 for incentive funds.

## Who can apply?

- Fleets must meet equity criteria.
- See Implementation Manual for full details.



## I need more help!

- For questions or to request technical assistance, please contact [infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org).





# Eligibility



EV Jump Start Applicants will need to meet specific eligibility criteria

# EV Jump Start Fleet Eligibility

If any of the following apply to the commercial fleet, they are eligible for EV Jump Start:

- Small business as identified in the California State Legislative Code.
- Certified Minority Business Enterprise, Woman-Owned Small Business, Veteran-Owned Small Business, or LGBT-Owned Small Business.
- Transit Agency located in or operating at least 50% of fleet operation in a designated Disadvantaged Community [1].
- School district in a designated Disadvantaged Community [1] or in a designated Low-Income Community [2].
- Tribal entity.
- Non-profit organization.
- Recharging infrastructure is in a designated Disadvantaged Community [1] or a Low-Income community [2].

[1] Defined [by CalEnviroScreen 4.0](#)

[2] Defined [by AB 1550](#)

# EV Jump Start Applicant Eligibility

The individual, organization, or company who completes and submits all necessary EnergIIZE application forms and is responsible for coordinating all subsequent documentation described in the Implementation Manual (IM) for their infrastructure project must be either:

## A Commercial Fleet or Vehicle Operator

OR

## An Approved Vendor

- Can be a business, organization, or individual.
  - Is responsible for operating one or more Medium- or Heavy-Duty Zero Emissions Vehicles (Class 2b and above) in the State of California.
  - One application associated with their Tax ID per funding wave.
- May apply on behalf of an eligible commercial fleet or vehicle operator.
  - Must be vetted by EnergIIZE staff and complete the [Approved Vendor Application](#).
  - May submit multiple applications; they may not submit multiple **applications** for the same fleet or the same site address.

NOTE: At this time, Charging as a Service (CaaS) is not eligible. If your company has a CaaS model, we encourage you to respond to [our RFI](#) due by August 15, 2022, 5p PST.

# EV Jump Start Equipment Eligibility

- Equipment is eligible for EV Jump Start if:
  - It is for recharging Class 2B or larger zero-emission vehicle (GVWR of 8,501 lbs. and greater) and;
  - It is on the customer side of the meter, up to the plug/nozzle of a vehicle and;
  - The equipment is new and;
  - Equipment provides either Level 2 EV Charging or DC Fast Charging; and
  - The equipment meets required standards.
- See full list of eligible equipment [on the EnerGIZE website](#) under “Choose Your Technology”.
- [The Infrastructure Readiness Center \(IRC\)](#) also has useful information and a link to the full Implementation Manual.
- To request adding equipment to Approved Product List, please email [infrastructure@calstart.org](mailto:infrastructure@calstart.org).



# Application Process



An overview on documentation you will submit  
as an EV Jump Start Applicant

# EV Jump Start: Application Checklist



- 1 EnergIIZE Application Form for EV Jump Start
- 2 Site Verification Form
- 3 Signed copy of EnergIIZE Terms and Conditions



**SCAN ME**

All forms can be [accessed at the EnergIIZE Home page](#) or with the QR code

# EV Jump Start: Application Checklist (Continued)



- 4 Confirmation of adequate preparation for energy from the local utility, such as:
  - Proof of Participation in Utility Make-Ready Programs
  - Copy of Request for New Service from Utility
- 5 **Signed Vehicle Commitment Agreement**
- 6 Jump Start Certification Form
- 7 Answers to Qualitative Questions (if applying for over \$150,000)





# Step 1: Submit Application



EV Jump Start Funding Lane

# EnergIZE Application Roadmap



## Step 1

### General Documents

- ✓ Application Form.
- ✓ Signed Terms and Conditions.
- ✓ Jump Start Certification Form.
- ✓ Vehicle Commitment Agreement.
- ✓ Qualitative Questions (if seeking more than \$150,000).

### Site Documents

- ✓ Site Verification Form.

### Other Documents

- ✓ Confirmation from utility that project site is prepared to receive the necessary energy for the planned infrastructure installation.

# Step 1: Submit Application

## *EnergIIZE Application Form*

### What's Inside the Document?

- Template Site Equipment Manifest
- Fields to indicate if you are a fleet applying on behalf of your organization, or if you are an approved vendor applying on behalf of a fleet

### What You Need to Complete It:

- ✓ Primary Contact Phone and Email of Fleet Operator
- ✓ Primary Contact Phone and Email of Vendor.
- ✓ Address of Infrastructure Project
- ✓ Name of Property Owner
- ✓ Make, Model, Description, and Anticipated Quantity of Eligible Equipment to be Installed
- ✓ Name, Type, and Supplier of Software (if applicable)

# EnergIIZE Commercial Vehicles Project EV Jump Start Incentives Application

**Application Category** (Please select Yes or No.)


EV Jump Start Funding Lane

Meets at least one Jump Start Equity Criteria. See Implementation Manual ([www.energize.org/irc](http://www.energize.org/irc)) Section 4.3.2 for more details.

Must complete the Jump Start Certification Form and submit with your application.

Note: For mixed fuel applications, please contact EnergIIZE staff for more information.

How did you hear about EnergIIZE?

**Are you a fleet applying on behalf of your organization?**

If Yes, fill out section A for Fleet Information. You may skip section B for Vendor Information.

If you are an Approved Vendor applying for a fleet, fill out section A for the Fleet Information and section B for Vendor Information.

Note: Approved Vendors must be vetted by EnergIIZE staff. Approved vendor must abide by the T&Cs as signed for the duration of the project and EnergIIZE terms.

**A. Fleet Information** (Please fill in the required information below.)

Is the Fleet filling out this application?

Will the Fleet own the infrastructure?

If No, provide the name of the owner:

Will the Fleet be the recipient of the EnergIIZE Incentives?

The individual, organization, or company to whom incentives shall be dispersed for eligible costs they incur.

Primary Contact:\*

Organization/Company Name:

Fleet Type:

If other, explain:

Mailing Address:

City:

State:

Zip Code:

Website:

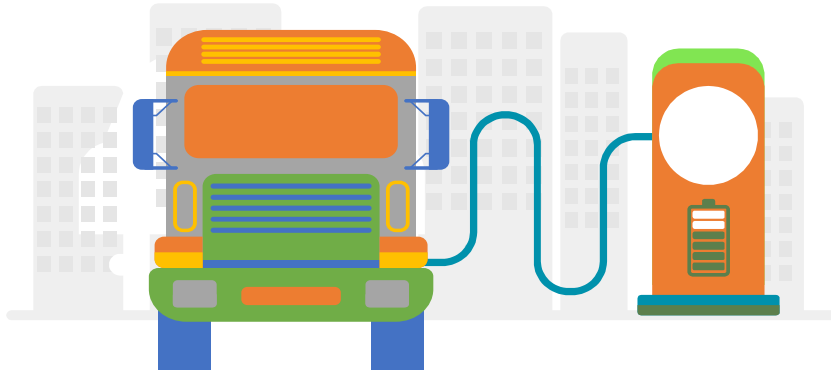
# Step 1: Submit Application

## *Terms and Conditions – The Fine Print*



### Time Commitments

- Operate this equipment in California for a minimum of five (5) years from the date of commissioning.
- Keep written records of the equipment purchased for a minimum of three (3) years after final payment received.
- Complete the semi-annual usage survey and questionnaire for three years after the commissioning of my project.
- 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.



# Step 1: Submit Application

## *Terms and Conditions – The Fine Print*



### Equipment/Insurance Terms

- Carry Worker's Compensation Insurance for all of its employees who will be engaged in the performance of this Agreement and must provide satisfactory evidence
- 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 must provide satisfactory evidence
- Equipment will be utilized for the charging or fueling of Class 2b – Class 8 commercial vehicles, operated and maintained as recommended by the manufacturer



### Other Terms

- All projects receiving funds through an EnergIIZE incentive comply with the payment of prevailing wages;
- Failure to comply with the terms of this agreement may result in repayment of incentive funds received to EnergIIZE Staff;
- Must be signed by Applicants and any applicable Approved/Preferred Vendors

# Step 1: Submit Application

## *Jump Start Certification Form*

### What's Inside the Document?

- Eligible Jump Start Categories
- Methods for self-certification

### What You Need to Complete It:

- ✓ Applicable documentation based on Eligible Category Selected
- ✓ Must meet at least one of the criteria
- ✓ In some cases, a narrative may be required

# Jump Start Certification Form

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## Appendix K – 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 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.
- Applicant is 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



# Step 1: Submit Application

## *Vehicle Commitment Agreement*

### What's Inside the Document?

- Commercial Fleet information
- Medium- and heavy-duty (MD/HD) zero-emission vehicle (ZEV) information
- Signature Field

### What You Need to Complete It:

- ✓ Fleet Point of Contact Name and Contact Info
- ✓ Fleet Tax ID
- ✓ Installation Site Address
- ✓ Vehicle Make, Model, Quantity, Cost
- ✓ Expected Date of Purchase
- ✓ Signature of Commercial Fleet Operator

# Vehicle Commitment Agreement Form

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## Appendix H – Vehicle Commitment Agreement EnerglIZE 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 with a gross vehicle weight rating (GVWR) of 8,501 pounds and greater according to the U.S. Environmental Protection Agency (EPA). This form applies to EV Jump Start applicants.

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:				

# Step 1: Submit Application

## *Site Verification Form*

### What's Inside the Document?

- Fields for Lessee
- Fields for Property Owner

### What You Need to Complete It:

- ✓ Applicant/Organization Name
- ✓ Applicant Project ID
- ✓ Installation Site Address
- ✓ Signatures verifying the installation work is authorized by the Property Owner and the Lessee

# Site Verification Form

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## Appendix D – EnergIIZE Site Verification Form

### Site Verification Form

EnergIIZE Commercial Vehicles Project participants that do not own the property where the proposed infrastructure 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 lessee. Each Owner and each Applicant (Fleet or Approved Vendor applying on behalf of a fleet) 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. In some circumstances, a letter of intent may be acceptable in place of this form. Please contact us if you are not able to sign this Site Verification Form.

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 fueling equipment and associated software. For more information about EnergIIZE, please visit [www.Energize.org](http://www.Energize.org).

<i>LESSEE. Please complete as follows:</i>	
Organization Name:	Enter Applicant/Org. Name
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.

<i>PROPERTY OWNER (landlord). Please complete as follows:</i>
The undersigned, on behalf of <a href="#">Click or tap here to enter text.</a> ("Owner"), hereby represents and warrants to EnergIIZE Staff (i)

# Step 1: Submit Application

## *Responses to Qualitative Questions from Rubric*

### What's Inside the Document?

- Scoring criteria for application
- Three qualitative questions.
  - How MD/HD ZEVs will be served and how infrastructure will be maintained
  - Local Community Buy-in and Support
  - Any Additional Community Benefits

### What You Need to Complete It:

- ✓ Answers to the three qualitative questions listed in the rubric (only applicable for applicants seeking more than \$150,000 incentives).
- ✓ Letters of Support (only applicable for applicants seeking more than \$150,000 incentives).

# Scoring Rubric and Qualitative Questions Screenshot

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## Appendix L – Scoring Rubric and Qualitative Questions

EV Fast Track Applicants will be evaluated **solely on item 1 below**, completeness of the application.

For the EnergiIZE Commercial Vehicles (Energy Infrastructure Incentives for Zero- Emission Commercial Vehicles) Project's competitive funding lanes (EV Jump Start, Hydrogen, and EV Public Charging), Applicants will be evaluated on items 1-3 below.

For applicants seeking **more than \$150,000** in incentives for competitive lanes, Applicants will be evaluated on items 1-6 below upon the close of the application windows. Please monitor [www.Energiize.org](http://www.Energiize.org) for opening and closing dates of each funding lane.

All **Hydrogen** applicants will be evaluated on items 7-9 as well. Applicants participating during funding lanes other than Hydrogen will not be evaluated on items 7-9.

All qualitative questions may be combined into one Word document.

All applications must obtain a **minimum of 50 points** to be recommended for funding. All Projects must submit the required application documents. For competitive lanes, funding will be awarded to Projects in ranked order until all available funds in each wave are exhausted. Tie scores will be broken as needed

**For large projects, \$150,000 and greater:**

For the three qualitative questions below, please read through and address each bullet point listed underneath. You are encouraged to submit supporting materials and photos, which may be used to determine scoring.

20

- 4. Qualitative Question #1-** In a Word document, please note how medium- and heavy-duty (MD/HD) zero-emission vehicles (ZEVs) will be serviced by proposed infrastructure and how this Project will maximize infrastructure utilization over time (i.e., maintenance plans to maintain high infrastructure uptime). (500-word limit)



# Qualitative Questions Screenshot

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<p><b>5. Qualitative Question #2-</b> In a Word document, please demonstrate local community buy-in and support. (500-word limit)</p> <ul style="list-style-type: none"> <li>• What steps have been taken to achieve community engagement? <ul style="list-style-type: none"> <li>◦ Describe the process for receiving community support and buy-in. Please provide examples of community outreach and engagement activities that you led or participated in.</li> </ul> </li> <li>• How was feedback collected and incorporated?</li> <li>• Please note any letters of support that you have received for the proposed Project. <ul style="list-style-type: none"> <li>◦ Applicants should include letters of support for the proposed Project from community organizations representing residents in the area where the Project is proposed.</li> <li>◦ Letters of support from appointed or elected officials are allowed, but letters from community-based organizations (e.g. neighborhood associations, environmental justice groups, faith-based organizations, Parent Teacher Associations, etc.) will be given greater weight in scoring.</li> </ul> </li> <li>• If the Applicant is a community group, Tribal government, or other entity that already represents local residents, briefly note that in this question response and describe the organization's structure in the project narrative.</li> </ul>	20
<p><b>6. Qualitative Question #3-</b> In a Word document, please describe any additional community benefits that go above and beyond the project's scope that the Applicant will commit to providing in conjunction with this Project. Applicants are encouraged to think creatively and be responsive to locally-identified needs in the community where the proposed Project will be located. (500-word limit)</p> <ul style="list-style-type: none"> <li>• Describe community benefits of the Applicant's MDHD Infrastructure project. (Examples of these benefits could be paid workforce development opportunities for local residents, expanded transit service for local residents, and/or offering no-cost light duty EV charging for local residents.)</li> <li>• What is the duration of any proposed benefits and how they might be measured?</li> <li>• How will the Applicant demonstrate these benefits being incorporated into the Project. (If the proposed community benefits include partnerships with a local partner i.e. community college, nonprofit, etc., please include a letter of support for the proposed Project from that organization confirming their participation and level of involvement if awarded.)</li> </ul>	20
<b>TOTAL POSSIBLE POINTS FOR QUALITATIVE SECTION</b>	<b>60</b>



# Scoring Rubric Screenshot

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## Qualitative Questions – Scoring Rubric

Qualitative Question #1 – Maximizing MD/HD Infrastructure Utilization- Total Max Score = 20 points

Primary Components	Purpose	Criteria	Max Score
Description of how MD/HD ZEVs will be serviced by proposed infrastructure.	EnergIIZE intends to fund MD/HD infrastructure; please briefly describe how your project meets that criteria.	<ul style="list-style-type: none"> <li>• 10 - Project has a clearly established MD/HD nature of vehicles being served by infrastructure.</li> <li>• 0 - Project has NOT clearly established MD/HD nature of vehicles being served by infrastructure.</li> </ul>	10
Description of how infrastructure use will be maximized over time, including maintenance and service plans to avoid broken infrastructure.	EnergIIZE intends to fund highly utilized infrastructure and seeks to avoid infrastructure that will be out of commission before the end of the product's life.	<ul style="list-style-type: none"> <li>• 10 - Project has well defined maintenance plan, extended product warranties, and engages with contractors who will focus on quality work performed.</li> <li>• 5 – Project does not adequately describe maintenance plans and/or little description of quality of work to be performed.</li> <li>• 0 – Maintenance plans are absent and there is little to no mention of quality and longevity in project description.</li> </ul>	10

# Step 1: Submit Application

*Confirmation from local utility that project site is prepared to receive the energy for the infrastructure installation*

## What's Inside the Document?

- May include copy of Request for New Service
  - Steps to Request New Service.
  - Guidelines and Restrictions.
- May include proof of participation in available utility programs for make-ready
  - Customer Agreement Form signed by site operator.

## What You Need to Complete It:

- ✓ Copy of Request for New Service
  - ✓ Contact your local utility company to confirm what is needed for new service.
  - ✓ Review local utility resources and guides.
  - ✓ Consult with a licensed electrician to determine whether your panel is appropriately rated for the increased load.

## CHARGE READY TRANSPORT PROGRAM PARTICIPATION AGREEMENT

This Charge Ready Transport Program Participation Agreement (Agreement) sets forth the terms and conditions for Program Participant to participate in the Charge Ready Transport Program. Pursuant to the terms of this Agreement, SCE will (1) install the Infrastructure (as defined herein) at no cost to the Program Participant; and (2) if applicable, remit the Charging Equipment Rebate and the Make-Ready Rebate after all terms and conditions have been met by the Program Participant.

All Program Participants are eligible for no-cost installation of the utility-side and customer-side make-ready infrastructure. Only Program Participants meeting one of the following requirements will be eligible for the Charging Equipment Rebate:

- (1) Program Participant is installing Charging Equipment listed on the Approved Product List (APL) to service transit or school buses;  
or
- (2) Program Participant is installing Charging Equipment listed on the APL at a project site that is located in a designated Disadvantaged Community (DAC) and the Program Participant is NOT listed on the Fortune 1000 list.

Program Participant hereby agrees to the following terms and conditions of the Charge Ready Transport Program (the "Program").



# Step 2: Provide Supporting Documents



EV Jump Start Funding Lane

# EnergIZE Application Roadmap



**Step 1**

**Step 2**

## General Documents

- ✓ Proof of Cost Share
- ✓ Copy of Purchase Order for Infrastructure Equipment
- ✓ Milestone Payment Schedule

## Site Documents

- ✓ Preliminary Site Plans

## Other Documents

- ✓ Proof of License from General Contractor
- ✓ Proof of Insurance from General Contractor
- ✓ EVITP Certification of General Contractor

EVTIP:  
Electric Vehicle  
Infrastructure  
Training Program

# Step 2: Provide Supporting Documents

## *Contractor Proof of License/Insurance*

### What's Inside the Document?

- Contractor's License Number
- Business Name
- Business Address
- Status of License
- Contractor's Bond and Insurance Information

### What You Need to Complete It:

- ✓ Coordinate with the General Contractor
  - ✓ Note: The electrician who is hired by the general contractor must have at least one person who is EVITP certified on site at all times
- ✓ Visit the Department of Consumer Affairs Website and Verify License Number with Contractors State License Board (CSLB)

# Contractor Proof of License/Insurance

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## Contractor's License Detail for License # [REDACTED]

**DISCLAIMER:** A license status check provides information taken from the CSLB license database. Before relying on this information, you should be aware of the following limitations.

- ▶ CSLB complaint disclosure is restricted by law (B&P 7124.6) If this entity is subject to public complaint disclosure click on link that will appear below for more information. Click [here](#) for a definition of disclosable actions.
- ▶ Only construction related civil judgments reported to CSLB are disclosed (B&P 7071.17).
- ▶ Arbitrations are not listed unless the contractor fails to comply with the terms.
- ▶ Due to workload, there may be relevant information that has not yet been entered into the board's license database.

### Business Information

Business Name

Business Address

**Entity** Corporation  
**Issue Date** 02/11/2019  
**Expire Date** 02/28/2023

### License Status

**This license is current and active.**

# Step 2: Provide Supporting Documents

## *Preliminary Site Plan*

### What's Inside the Document?

- Address of Infrastructure Site
- Diagram in Site Plan of Charging Infrastructure

### What You Need to Complete It:

- ✓ General Contractor and Architect Signature
- ✓ Signed Easement or Right of Access documents



# ELECTRIC VEHICLE CHARGING STATION INSTALLATION

CITY OF AUBURN

MAGNOLIA AVE & TENNIS WAY  
AUBURN 95603

APN 002-122-013-000



CALL 811 OR 800-485-5844  
MINIMUM 2 BUSINESS DAYS WITH A NOTICE OF 14 CALENDAR DAYS

GENERAL SYMBOLS AND ABBREVIATIONS	
SYMBOL	DESCRIPTION
	480V/277V/208V
	240V/120V
	120V
	600V
	1000V
	1500V
	2000V
	2500V
	3000V
	3500V
	4000V
	4500V
	5000V
	5500V
	6000V
	6500V
	7000V
	7500V
	8000V
	8500V
	9000V
	9500V
	10000V

SHEET LIST	
SHEET NUMBER	SHEET TITLE
C1.0	OWNER SHEET - GENERAL, LOAD, ELECTRICAL, WIRING, GENERAL NOTES
C1.1	ONE LINE DIAGRAM, PANEL SCHEDULES, AND WIRING SCHEDULE CALCULATIONS
C1.2	ELECTRICAL
C1.3	EQUIPMENT SCHEDULES AND MECHANICAL NOTING
C1.4	EQUIPMENT SCHEDULES, CONTINUED

CODE REFERENCES	
91910	CALIFORNIA ELECTRICAL CODE
91911	CALIFORNIA ENERGY CODE
91912	CALIFORNIA FIRE CODE INCLUDING 2016 IBC WITH 2013 SUPPLEMENT, FIRE ALARM CODES AS AMENDED
91913	CALIFORNIA BUILDING CODE (CBC), PARTICULARLY 2016 IBC AND 2013 IBC FOR ACCESSIBILITY
91914	NEC/IFC
91915	NEC/IFC WITH 2013 SUPPLEMENT
91916	NEC/IFC WITH 2013 SUPPLEMENT AND 2013 SUPPLEMENT

SCOPE	
CONTRACTOR TO PROVIDE CHARGING STATION TO 240V AND ACCORDING TO CHARGING STATION COMPLETE WITH NEW WIRING, ELECTRICAL, WIRING, PANELS, AND NOTING FOR ALL REQUIREMENTS.	
NOTIFICATION AND PERMITS FOR THE INSTALLATION OF NEW WIRING	
THE CONTRACTOR SHALL BE RESPONSIBLE FOR THE CHARGING STATION SYSTEM AND ALL WIRING	
THE CONTRACTOR SHALL BE RESPONSIBLE FOR THE CHARGING STATION AND ALL WIRING	
THE CONTRACTOR SHALL BE RESPONSIBLE FOR THE CHARGING STATION AND ALL WIRING	

GENERAL NOTES	
1. ALL WORK SHALL BE COMPLETED WITHIN THE TIMEFRAME OF THIS INSTALLATION.	
2. ALL WORK SHALL BE IN ACCORDANCE WITH ALL APPLICABLE CODES.	
3. CONTRACTOR SHALL BE RESPONSIBLE FOR ALL WIRING, PANELS, AND NOTING SUBJECT TO MUTUAL AGREEMENT OF ALL PARTIES. CONTRACTOR SHALL BE RESPONSIBLE FOR ALL WIRING, PANELS, AND NOTING SUBJECT TO MUTUAL AGREEMENT OF ALL PARTIES.	
4. CONTRACTOR SHALL BE RESPONSIBLE FOR ALL WIRING, PANELS, AND NOTING SUBJECT TO MUTUAL AGREEMENT OF ALL PARTIES.	

VICINITY MAP - NOT TO SCALE	

REVISIONS	
NO.	DESCRIPTION
1	INITIAL RELEASE
2	CITY COUNCIL REVIEW

PHASE 1: GENERAL ELECTRICAL

OWNER: CITY OF AUBURN

PROJECT: MAGNOLIA AVE & TENNIS WAY

APN: 002-122-013-000

DATE: 10/15/2016

DESIGNER: [Logo]

ELECTRIC VEHICLE CHARGING STATION INSTALLATION

CITY OF AUBURN

MAGNOLIA AVE & TENNIS WAY

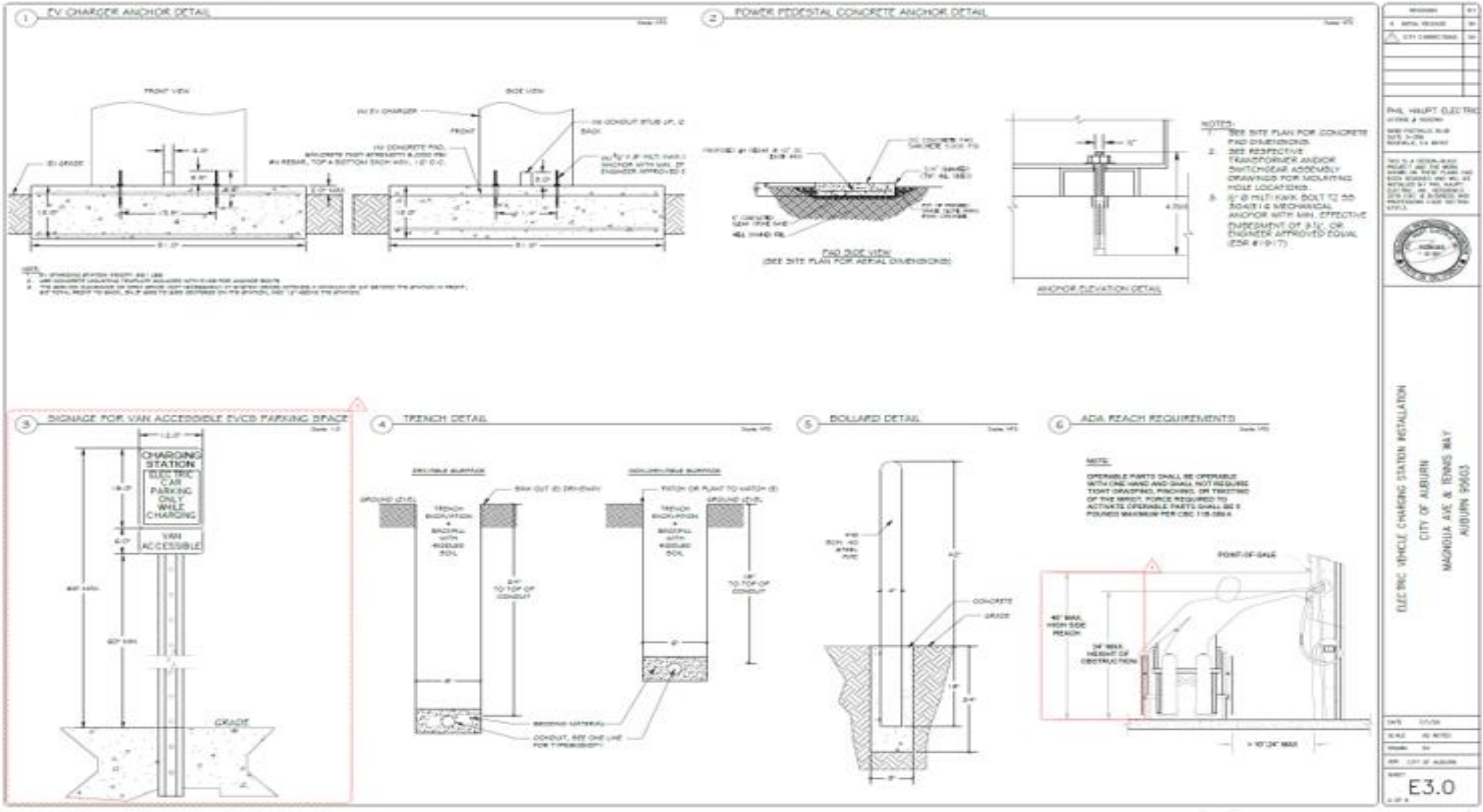
AUBURN 95603

DATE	10/15/2016
SCALE	AS SHOWN
OWNER	CITY OF AUBURN
PROJECT	ELECTRIC VEHICLE CHARGING STATION INSTALLATION
SHEET	C1.0
OF	1 OF 5







# Example Preliminary Site Plan

# Step 2: Provide Supporting Documents

## *Proof of Cost Share – Cover Letter and Supporting Documents*

### What's Inside the Document?

- 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

### What You Need to Complete It:

- ✓ Notices of proposed award
- ✓ Notice of grant award
- ✓ Other official documentation indicating an award of funding
- ✓ **Note: EnergIIZE funding cannot be stacked with other active California Energy Commission funding programs. But you can stack!**

## Appendix E – Energize Cost Share Cover Sheet

### Cost Share Cover Sheet

#### Cost Share Cover Sheet

To complete Step 2 of the application process for the Energize Commercial Vehicles EV Fast Track Funding, please complete 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. Energize staff may verify funding amounts with entities stated below.
- Demonstrate proof that project costs beyond what is requested for incentives are covered including public funds from other grant programs, private investment, and financing. Requested Energize incentive funds must be clearly shown as meeting (not exceeding) total project costs.

Funding Source	Funding Amount

Funding Disclosure Subtotal: \_\_\_\_\_

Total Proposed Project Cost: \_\_\_\_\_

# Cost Share Cover Sheet

# Step 2: Provide Supporting Documents

## *Copy of Purchase Order(s)*

### What's Inside the Document?

- List of Purchased Equipment
- Amount of Equipment
- Cost per Unit
- Date of Purchase
- Overall Total

### What You Need to Complete It:

- ✓ Itemized Receipts of Purchases
- ✓ Invoice Numbers

# Example EVSE Purchase Order

[Redacted] project using vouchers

ISSUED: 28-Dec-20

Item#	Units	Item	Description	Unit Price	Total Amount
1	17	Infrastructure inside freezer facility	Install 400 amp breaker then route from switchgear, to 400 amp breaker panel on freezer wall, install 30 amp disconnects at each door (17 total). DC Voltage plugs supplied and installed at doors and cordless pads for trailer legs included.		
2	9	Infrastructure outside facility in parking lot parking spaces 565, 566, 567, 568, 569, 570, 571, 572	Route 480 volt 400 amp bucket to parking lot in ground by sawcutting/trenching or line bore from pallet jack area in building south corner to bollarded transformers at parking lot (569) lite pole. Run sufficient conduit for future additional 48 spaces. Install in ground cords and pads for 9 DC low voltage parking spaces. Supply and install Industry Standard Assure final testing and provide in service sign off.		
3	1	Infrastructure maintenance	Route 480 volt power to maintenance dock area for one APU unit		
4	27	Auxiliary Power Units	480 volt to 45 volt DC power Auxiliary Power Units (APU's)		
5	27	In ground Pads	Cordless pads 1/2 inch x 24" inset on concrete Labor portion Material portion subject to tax		
			Deposit check # [Redacted] Credit Memo#12 [Redacted] CORE vouchers [Redacted] Customer approval [Redacted] Tax on Materials [Redacted]		
			Total		





# Example EVSE Purchase Order

---

**Invoice**  
Page: 1

Invoice [REDACTED]  
Invoice Date: [REDACTED]

Ship To: [REDACTED]

Bill To: [REDACTED]

Customer ID [REDACTED]  
P.O. Number [REDACTED]  
P.O. Date [REDACTED]  
Our Order No. [REDACTED]  
SalesPerson [REDACTED]

Due Date 1/12/2021  
Terms Net 20 Days

Item/Description	Unit	Order Qty	Labor/Parts	Quantity	Unit Price	Total Price
Solar Trailer Charger (\$3000 CORE voucher applied)	CH10001	1	EACH	1	[REDACTED]	[REDACTED]
[REDACTED]						
Charger EACH						[REDACTED]
Installation						[REDACTED]
Subtotal						[REDACTED]
Tax Paid						[REDACTED]
Total						[REDACTED]
Less CORE Voucher						[REDACTED]
Total						[REDACTED]

Amount Subject to Sales Tax [REDACTED]  
Amount Exempt from Sales Tax [REDACTED]

**Subtotal:** [REDACTED]  
Invoice Discount: [REDACTED]  
Total Sales Tax: [REDACTED]  
**Total:** [REDACTED]

# Step 2: Provide Supporting Documents

## *Milestone Payment Schedule*

### What's Inside the Document?

- Overview of the Milestone payment schedule and requirements
- Instructions for how to fill out document

### What You Need to Complete It:

- ✓ Estimated payments, date of payment, completion date

File Home Insert Draw Page Layout Formulas Data Review View Help Acrobat

Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

DETECT RISKY ACTIVITY Explore better ways to quickly respond to insider risks that could compromise your organization's data. Learn more

A2 Milestone Payment Schedule

	A	B	C	D	E	F	G	H	I
7	<b>Applicant Information</b>								
8	[Contact Name]								
9	[Organization]								
10	[Address 1]								
11	[City, State, Zip]								
12	[Phone]								
13	[Email]								
14									
15	<b>Conditional Award Total</b> (found in your Conditional Award)		\$		-				
16									
17	<b>Schedule</b> (projects are eligible for milestone payment(s) for costs incurred starting in Step 3 of the application process)				<b>Complete during Step 2.</b>			<b>Complete once available.</b>	
18	<b>Milestone Payment #</b>	<b>Description of Anticipated Incurred Costs</b>	<b>Anticipated Incurred Costs</b>	<b>Anticipated Completion Date</b>	<b>Anticipated Payment Request Date</b>	<b>Description of Incurred Costs</b>	<b>Actual Incurred Costs</b>	<b>Actual Completion Date</b>	<b>Actual Payment Request Date</b>
19	1								
20	2								
21	3								
22	4	optional for Hydrogen applications only							
23	Final								
24									
25	<b>Schedule Completed by: check one</b>		<input type="checkbox"/> Fleet	<input type="checkbox"/> Approved Vendor					
26	Company Name								
27	Contact Name								
28									
29	<b>EnergIIZE Team Approval</b>								
30	Reviewed by			Date					
31									
32									
33									
34									
35									
36									

Milestone Payment Schedule





# Step 3: Plan Project



EV Jump Start Funding Lane

# EnergIIZE Application Roadmap



**Step 1**

**Step 2**

**Step 3**

## General Documents

- ✓ Project Plan and Scope of Work, Including Construction Timeline.

## Site Documents

- ✓ Copy of Building Permit.

## Other Documents

- ✓ California Environmental Quality Act (CEQA) filing.
- ✓ Copy of paid invoice showing eligible costs incurred (if requesting milestone payment).

# Step 3: Plan Project

## *California Environmental Quality Act (CEQA) Filing*

### What's Inside the Document?

- Overview and purpose of CEQA
- Information regarding if CEQA review is necessary for your project
- If project is exempt, Notice of Exemption (NOE) form contains address of infrastructure project and exempt status

### What You Need to Complete It:

- ✓ Determine if your infrastructure project falls under any exemptions from CEQA
- ✓ If the project does not fall under any exemptions, the applicant will undertake an initial study to determine if the project will result in a significant environmental impact
- ✓ If project is exempt, complete Office of Planning and Research (OPR) NOE form

# Office of Planning and Research Notice of Exemption

## Notice of Exemption

## Appendix E

To: Office of Planning and Research  
P.O. Box 3044, Room 113  
Sacramento, CA 95812-3044

From: (Public Agency):

County Clerk

County of:

(Address)

Project Title:

Project Applicant:

Project Location - Specific:

Project Location - City:

Project Location - County:

Description of Nature, Purpose and Beneficiaries of Project:

Name of Public Agency Approving Project:

Name of Person or Agency Carrying Out Project:

Exempt Status: (check one):

- Ministerial (Sec. 21080(b)(1); 15268);
- Declared Emergency (Sec. 21080(b)(3); 15269(a));
- Emergency Project (Sec. 21080(b)(4); 15269(b)(c));
- Categorical Exemption. State type and section number:
- Statutory Exemptions. State code number:

Reasons why project is exempt:

Lead Agency

Contact Person:

Area Code/Telephone/Extension:

If filed by applicant:

1. Attach certified document of exemption finding.
2. Has a Notice of Exemption been filed by the public agency approving the project?  Yes  No

Signature:

Date:

Title:

Signed by Lead Agency  Signed by Applicant

Authority cited: Sections 21083 and 21110, Public Resources Code.  
Reference: Sections 21108, 21152, and 21152.1, Public Resources Code.

Date Received for filing at OPR:

# Step 3: Plan Project

## *Building Permit*

### What's Inside the Document?

- Applicant name, address, contact information
- Contractor name, address, contact information, license
- Property owner name, address, contact information
- Architect name, address, contact information
- Description of work and property

### What You Need to Complete It:

- ✓ Coordination with property owner, architect, and contractor
- ✓ Site Plans
- ✓ Best Practice: have utility involved in permitting process







# Step 4: Initiate Construction



EV Jump Start Funding Lane

# EnergIZE Application Roadmap



## General Documents

- ✓ Pictures showing installation of Serialized Electric Vehicle Supply Equipment (EVSE), meter mains, transformers, and Americans with Disabilities Act (ADA) Compliance.

## Site Documents

- ✓ Copy of Signed Inspections Sheet and Closed Building Permit.
- ✓ Copy of paid invoice showing eligible costs incurred (if requesting milestone payment).

# Step 4: Initiate Construction

## *Verification Pictures*

### What's Inside the Document?

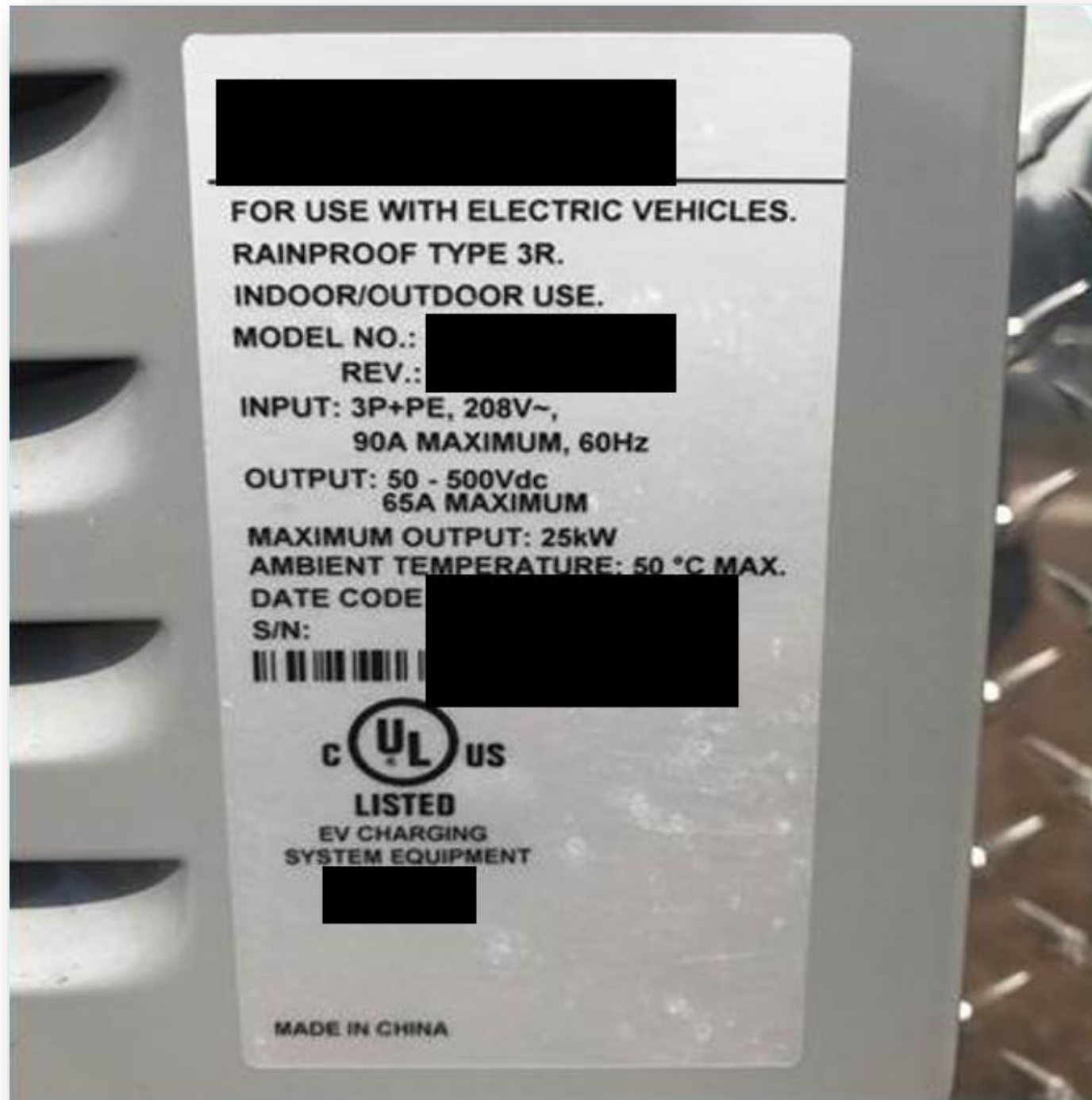
- ❑ Photos of installed equipment

### What You Need to Complete It:

- ✓ Pictures showing:
  - ✓ Installation of Serialized Electric Vehicle Supply Equipment (EVSE)
  - ✓ Meter Mains
  - ✓ Transformers
  - ✓ Americans with Disabilities Act (ADA) Compliance
- ✓ Pictures showing serial numbers on the installed equipment.

# Example Pictures

---



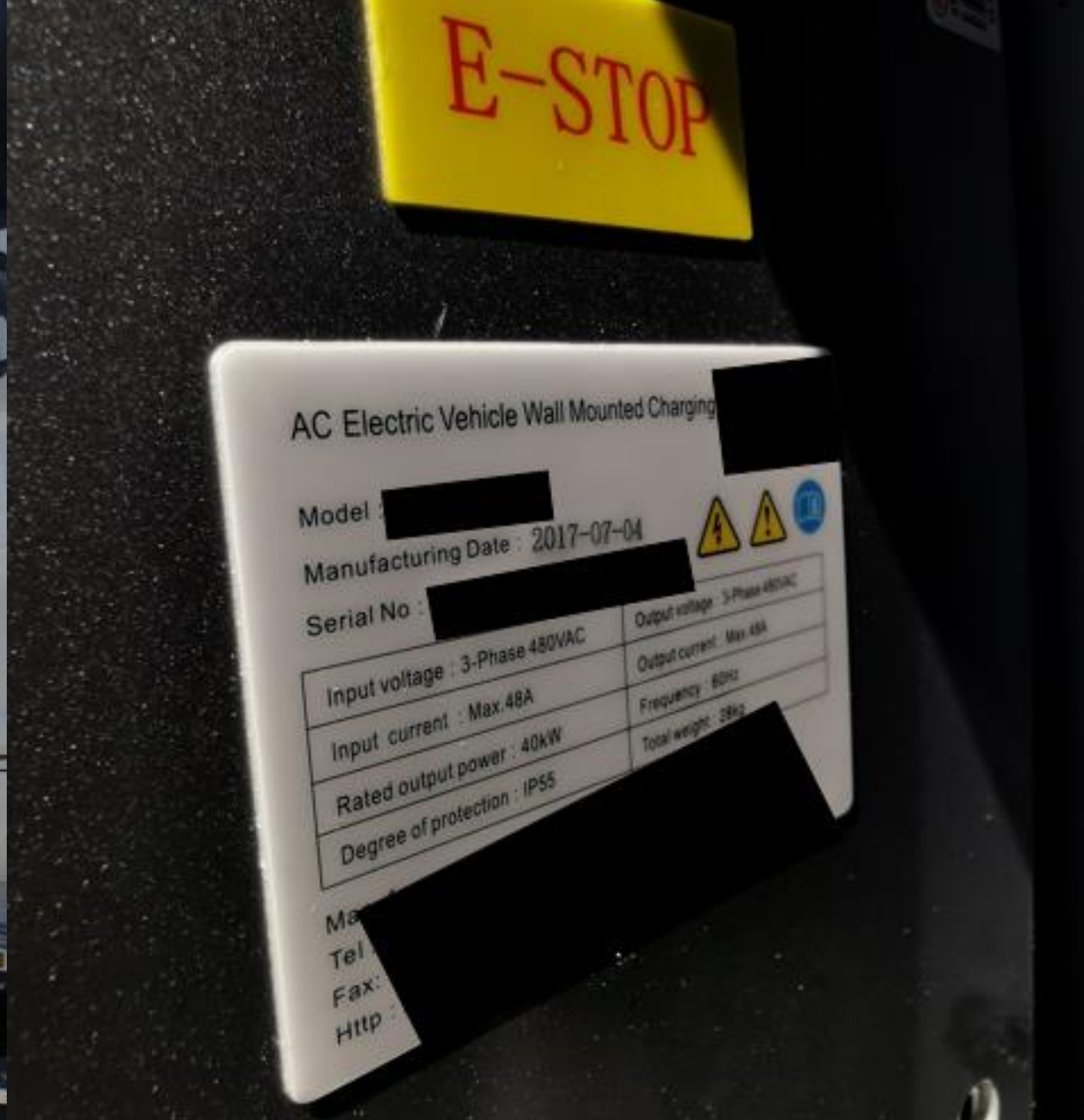
# Example Pictures

---





## Example Pictures





# Step 4: Initiate Construction

*Copy of Signed Inspections Sheet and Closed Building Permit*

## What's Inside the Document?

- Parcel Number
- Permit Number
- Address of Infrastructure Site
- Contractor Information
- Architect/Engineer Information
- Description of Work

## What You Need to Complete It:

- ✓ Coordination with property owner, architect, and contractor



# Step 5: Commission Project



EV Jump Start Funding Lane

# EnergIIZE Application Roadmap



Step 1



Step 2



Step 3



Step 4



Step 5

## General Documents

- ✓ Copy of Verification of Third-Party Network Provider Communications.
- ✓ Verification of 4G Cell Activation and IP Registration.
- ✓ Verification of Recharging.
- ✓ For EVSEs: RSA certification of Level 2 Charging (where necessary).
- ✓ Copies of final invoices.

# Step 5: Commission Project

## *Copy of Third-party Network Provider Communications Contract*

### What's Inside the Document?

- Confirmation of network activation

### What You Need to Complete It:

- ✓ 4G cell phone activation
- ✓ IP registration

# Step 5: Commission Project

## *Verification of Recharging*

### What's Inside the Document?

- Confirmation that chargers are in working order

### What You Need to Complete It:

- ✓ The owner/operator shall charge an EV as part of the site equipment verification process

# Step 5: Commission Project

*Copies of All Invoices Are Submitted*

## What's Inside the Document?

- Address of Infrastructure Site
- Date of transaction
- Installed Infrastructure

## What You Need to Complete It:

- ✓ Complete invoices



# BTCPower

www.btcpower.com

Broadband TelCom Power, Inc.  
1719 S. Grand Ave  
Santa Ana, CA 92705  
USA

Tel.: (714)-259-4888  
Fax: (714)-259-7998  
E-mail: sales@btcpower.com  
http://www.btcpower.com

## Invoice

Sold To: [Redacted]

Ship to: [Redacted]

Sales Order Number:  
[Redacted]

Invoice Number:  
[Redacted]  
Invoice Date:  
Mar 28, 2018

# Example Invoice

Customer ID	Customer PO	Payment Terms		
[Redacted]	[Redacted]	Net 30 Days		
Sales Rep ID	Shipping Method	Ship Date	Due Date	
[Redacted]	Best Way		4/27/18	
Quantity	Item	Description	Unit Price	Extension
1.00		Serial Number: EVFC-PXML-032018-480-0002	[Redacted]	
1.00		DCFC - 50kw - Single Port (CHAdeMO)	[Redacted]	
1.00		480VAC	[Redacted]	
		Packaging and Crating	[Redacted]	
		Update Display	[Redacted]	

PAID  
4/30/18

Subtotal [Redacted]  
Sales Tax [Redacted]  
Freight [Redacted]  
**TOTAL** [Redacted]

# EV Jump Start: Application Checklist



- 1 EnergIIZE Application Form for EV Jump Start
- 2 Site Verification Form
- 3 Signed copy of EnergIIZE Terms and Conditions



**SCAN ME**

All forms can be [accessed at the EnergIIZE Home page](#) or with the QR code



# EV Jump Start: Application Checklist (Continued)



- 4 Confirmation of adequate preparation for energy from the local utility, such as:
  - Proof of Participation in Utility Make-Ready Programs
  - Copy of Request for New Service from Utility
- 5 **Signed Vehicle Commitment Agreement**
- 6 Jump Start Certification Form
- 7 Answers to Qualitative Questions (if applying for over \$150,000)



# Frequently Asked Questions

# You Might Have These Questions

**Q:** *When does the EV Jump Start lane open for applicants?*

**A:** Applications will be accepted beginning at 9:00 a.m. Pacific Time September 1, 2022. This is a competitive process, NOT first-come, first-served like other funding lanes. The application window is open from September 1 to 5:00 p.m. Pacific Time September 30.

**Q:** *How much time do I have to gather documents?*

**A:** Once EV Jump Start applicants have been provided with their notice of conditional award after completion of Step 1, they will then have 90 days to provide the information in Step 2.

**Q:** *If I have questions before launch of EV Jump Start, what is best way to get these questions answered?*

**A:** Contact [infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org).



# Q&A

# Contact Us

---



877-ENR-GIZE  
877-367-4493



[infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org)



[Energiize.org](http://Energiize.org)



48 S. Chester Ave  
Pasadena, CA 91106