

<b>DOCKETED</b>	
<b>Docket Number:</b>	21-TRAN-04
<b>Project Title:</b>	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)
<b>TN #:</b>	246524
<b>Document Title:</b>	CALSTART Comments - EnergIIZE EV Public Charging Application Process Workshop Slides and Recording
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<b>Organization:</b>	CALSTART
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Submitted On: 10/13/2022  
Docket Number: 21-TRAN-04*

## **EnergIZE EV Public Charging Application Process Workshop Slides and Recording**

EnergIZE Commercial Vehicles Project EV Public Charging Application Process slide deck below from September 28, 2022 presentation.

A recording of the workshop is viewable at the link below.  
<https://www.youtube.com/watch?v=bJwAu4vRHu0>

*Additional submitted attachment is included below.*



## **EnergiZE Workshop**

Application Process

Public Charging

September 28, 2022

# EnergIZE 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/81005962480?pwd=K1VBaHBGeIozcDFvOVF0NDJWYWVRGZz09>

**Webinar ID:** 810 0596 2480

**Passcode:** 918327

## Mobile:

+16694449171,,81005962480# US

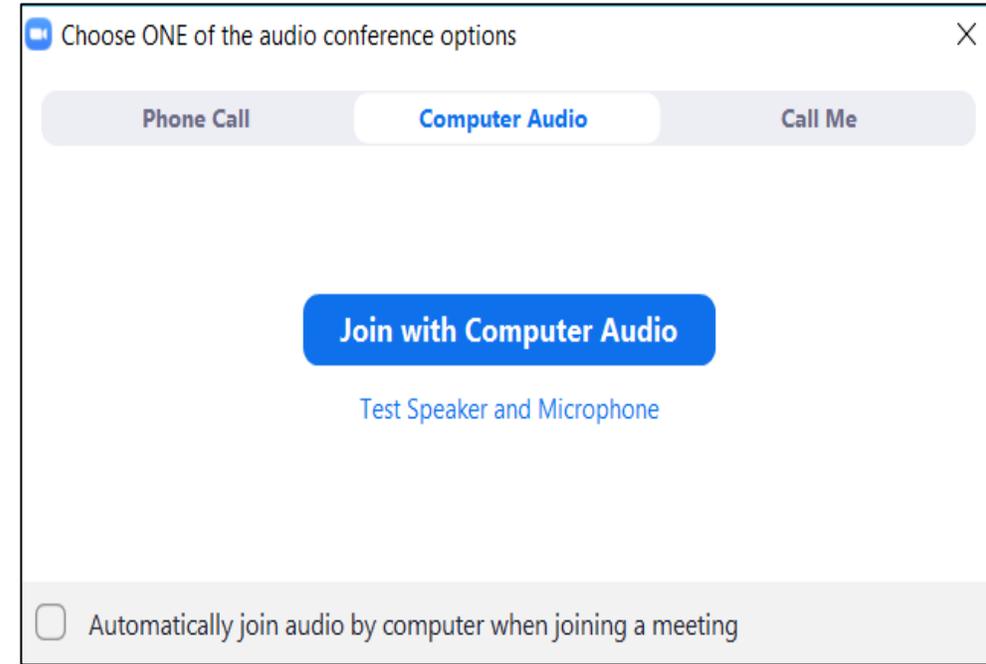
+16699006833,,81005962480# US (San Jose)

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 Q&A function.

# Agenda

## 1 Overview

## 2 Walkthrough of EnerglIZE Public Charging Application Process

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

## 3 Q&A



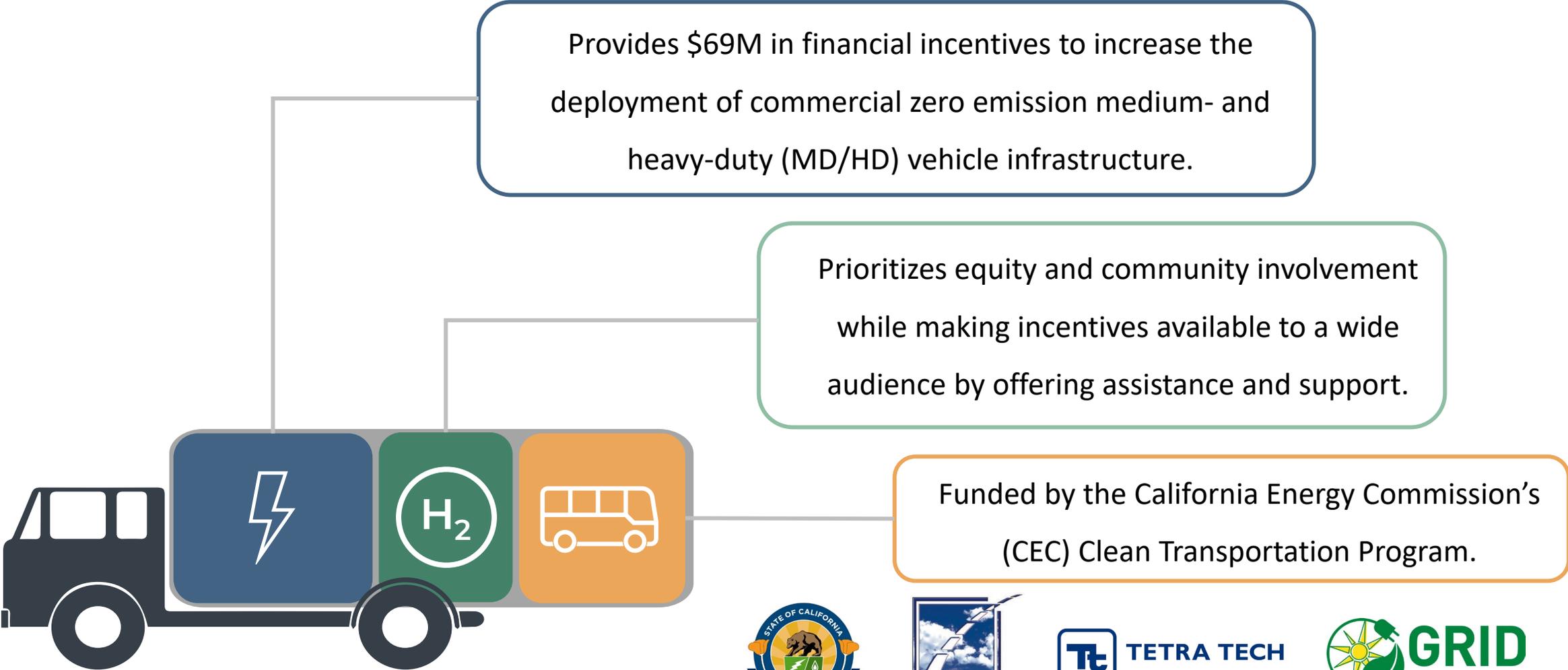
# Overview



Public Charging Funding Lane  
Opening October 14-28, 2022

# Overview of EnerglIZE

## Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles



# Public Charging Funding Lane

Public Charging 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: Oct. 14 – 28, 2022.

## What is covered?



- 50% - 75% of Eligible Costs Incurred (see Section 6 of the [Implementation Manual](#)).
- Project cap of \$500,000 - \$750,000 for incentive funds.

## Who can apply?

- Those who are installing infrastructure that can be used by the public.
- Those providing Charging as a Service.
- 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).



# Public Charging



- **Eligibility:**

- Applicant is an EV public or shared charging station developer, site owner, authorized lessee, or an authorized representative of a site where MD/HD EV Infrastructure will be installed and open to the public.
- Applicant must show documentation proving adequate utilization and throughput for the proposed Public Charging location.

- **Technical requirements:**

- Either level 2 or Direct Current Fast Charging (DCFC) chargers.
- Chargers must meet both fleet duty cycle requirements and remain within utility capacity.
- Minimum power rating for Electric Vehicle Supply Equipment (EVSE) shall not be less than 19.2kW.
- Approximately 50% of funds for this lane will be dedicated to Public Charging and 50% to Charging as a Service (CaaS).
- EnergIIZE reserves the right to adjust this breakdown dependent after receipt of applications.

# Charging as a Service (CaaS)

- **Definition:**
  - A general term which applies to vendors who build, own, and maintain EV Infrastructure on behalf of a fleet.
  - Business model varies across different vendors, but typically provides solution for equipment, installation, software, site maintenance, and/or driver support for an agreed upon recurring fee.
  - Service may be onsite or offsite relative to the fleet's primary business address.
- As a trial/pilot, EnerGIIZE will accept Charging as a Service applications during the Public Charging Lane
- CaaS applications do not need to be for infrastructure that will be open to the public
- In order to be eligible, Applicant Team must include a CaaS vendor who intends to install EV infrastructure to support a private MD/HD fleet, or for a site open to the public.
- Approximately 50% of funds for this lane will be dedicated to CaaS and the remaining will be for public charging.
- EnerGIIZE reserves the right to adjust this breakdown dependent after receipt of applications.

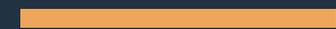
# Future Cost Reimbursement Webinar

- There will be an additional webinar on cost reimbursement (details coming soon).
- Items to be covered:
  - Cost reimbursement for EnerGIIZE applications.
  - Cost reimbursement for CaaS applications.
- Click [here](#) to sign up for news and updates, or scan the QR code.





# Application Process



An overview on documentation you will submit  
as a Public Charging Applicant

# Public Charging: Application Checklist



- 1 EnergIIZE Application for Public Charging (now online)
- 2 Proof of cost share and supporting documentation
- 3 Proof of Ownership or Site Verification Form
- 4 Signed copy of EnergIIZE Terms and Conditions

All forms can be accessed at the EnergIIZE Home page ([energiize.org](https://energiize.org)), or by [clicking here](#).

# Public Charging: Application Checklist (Continued)



- 5** Confirmation of request for service from the local utility or evidence of coordination, such as:
  - Proof of Participation in Utility Make-Ready Programs
  - Copy of Request for New Service from Utility
  - Evidence of communication with Utility
- 6** **Proof of ownership or purchase orders for MD/HD ZEV for associated fleets** (CaaS applicants only)
- 7** Jump Start Certification Form (if eligible)
- 8** Answers to Qualitative Questions (if applying for over \$150,000)



# Step 1: Submit Application



Public Charging Start Funding Lane

# EnergIIZE Application Roadmap



## Step 1

### General Documents

- ✓ Application (**now online**).
- ✓ Proof of cost share.
- ✓ Signed Terms and Conditions.
- ✓ Jump Start Certification Form (if applicable).
- ✓ Proof fleet of Vehicle ownership (for CaaS only).
- ✓ Answers to Qualitative Questions (if seeking more than \$150,000)..

### Site Documents

- ✓ Proof of ownership or Site Verification Form (or other accepted documents).
- ✓ If new or upgraded equipment is provided by the utility, then proof of easement is required.

### Other Documents

- ✓ Evidence that applicant is engaging with utility to ensure that project site will be prepared to receive the necessary energy for the planned infrastructure installation.

# Step 1: Submit Application

## *Infrastructure Processing Center (IPC)*

### What's on the IPC?

- Application Form - 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.
- Site Equipment Manifest.
- All subsequent documents listed will be uploaded to the IPC.

### 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).
- ✓ All required documents listed on following slides and in application checklist.

\*This is a draft version of the IPC. There may be minor changes in the version you see in October 2022.

The screenshot shows a web application interface for the Incentive Processing Center. At the top, there is a dark blue header with a menu icon, a search icon, a notification bell, and a user profile icon. Below the header, the main content area is white. On the left, there is a red pencil icon followed by the text "Application - 2022-09-15 20:43:50Z". On the right, there is a red button labeled "Submit Application". Below this, there is a table with three columns: "Status", "Total Project Cost", and "Eligible Award Amount". The values are "Pending Submittal", "", and "\$0.00" respectively. Below the table, there is a horizontal navigation bar with tabs: "Instructions", "Basic Details" (which is underlined in red), "Recipient", "Vendor", "Project Site", "Cost Share", and "More". The "Basic Details" tab is expanded, showing a section titled "Basic Information" with a downward arrow. Below this section, there are five form fields: 1. A question "Will your station be open to the public?" with a text input field containing "Yes". 2. A question "\* Estimated Total Project Cost" with an empty text input field. 3. A question "\* Meets at least one Jump Start Equity Criteria. See Implementation Manual (www.energiize.org/irc) for more details" with a dropdown menu showing "--None--". 4. A question "\* Provide brief summary of your project" with a large text area. 5. A question "\* How did you hear about EnergiIZE?" with a large text area.

# Step 1: Submit Application

## *Proof of Cost Share – Online Form and Supporting Documents*

### What Information Needs to be Provided?

- 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 with other programs!**

\*This is a Draft version of the IPC. There may be minor changes in the version you see in October 2022.

The screenshot shows a web application interface for an application submission. At the top, there is a dark blue header with a menu icon, search, notification, and user profile icons. Below the header, the application title is "Application - 2022-09-15 20:43:50Z" with a red pencil icon, and a "Submit Application" button is on the right. A summary table shows the following information:

Status	Total Project Cost	Eligible Award Amount
Pending Submittal		\$0.00

Below the summary, there are navigation tabs: "Instructions", "Basic Details", "Recipient", "Vendor", "Project Site", "Cost Share" (which is highlighted in red), and "More". The "Cost Share" section contains several required fields:

- \* Funding Source: A text input field with a red border and the message "Complete this field." below it.
- \* Funding Type: A dropdown menu currently showing "--None--".
- \* Estimated Percentage (%) of Total Project Costs Covered: A text input field.
- \* Funding Amount: A text input field.
- \* Funding Description: A large text area for a detailed description.

A red "Next" button is located at the bottom right of the form.

## Cost Share within IPC

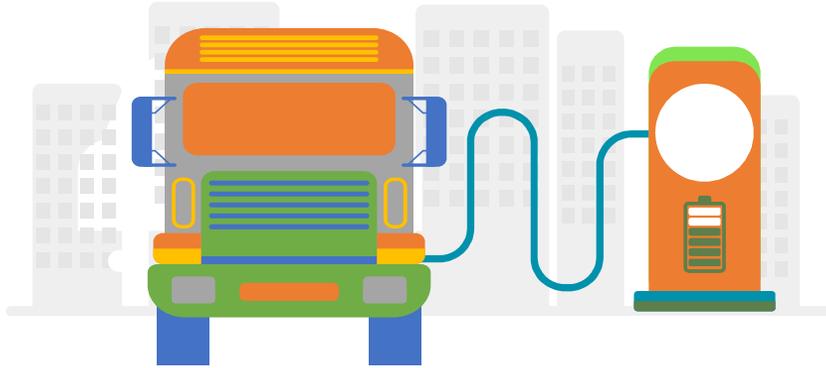
# Step 1: Submit Application

## *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.

# Step 1: Submit Application

## *Site Verification Form or Proof of Ownership*

### What's Inside the Document?

- Fields for EnerGIIZE applicant.
- Fields for Property Owner.

### What You Need to Complete It:

- ✓ If new or upgraded equipment is provided by the utility, then proof of easement is required.
- ✓ If applicant does not own the property complete Site Verification Form:
  - ✓ Organization Name.
  - ✓ Applicant ID.
  - ✓ Installation Site Address.
  - ✓ Signatures verifying the installation work is authorized by the Property Owner and the EnerGIIZE applicant.
- ✓ If applicant owns the property:
  - ✓ Provide evidence of this (e.g. Deed).

# Site Verification Form

## Appendix D – EnergIIZE Site Verification Form

### Site Verification Form

The purpose of this form is to establish that the program applicant or participant is able and authorized to make alterations and/or improvements necessary to the site on which infrastructure will be constructed and commissioned. This form establishes that those who do not own the property where infrastructure will be located have clear and established authorization from owners of the site concerning its alteration and improvement. Please contact us if you are not able to sign this Site Verification Form, for any reason. Review 8.1 Application, Step 1 for documentation that is acceptable in lieu of this form.

**Please note:** this form is not required if applicant can establish proof of ownership of site where infrastructure will be installed.

<i>EnergIIZE Applicant. Please complete as follows:</i>	
Organization Name:	Enter Applicant/Org. Name
Enter Applicant ID. Installation Site Address:	Enter Address
City: Enter City State: Enter State Zip 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) that Owner is the property Owner located at <a href="#">Click or tap here to enter text.</a> ("Property") where infrastructure will be installed; (ii) that Owner has consented to EnergIIZE Applicant's/participant's installation of certain EV charging station equipment and/or hydrogen fuel cell refueling equipment at the property; and (iii) that the undersigned has been duly authorized to execute and submit this Site Verification Form to EnergIIZE Staff. Owner acknowledges and agrees that EnergIIZE Staff is relying on Owner's foregoing certifications in reviewing and approving of Applicant's application.	
Installation Site Address:	Enter Address
City: Enter City State: Enter State Zip Code: Enter Zip Code	

# 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

# Qualitative Questions Screenshot

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For large projects, \$150,000 and greater:	
<p>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.</p> <p><b>4. Qualitative Question #1-</b> 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)</p>	20
<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>• Describe the Applicant Team (refer to <a href="#">Key Terms</a>). If any member of the Applicant Team 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

**6. Qualitative Question #3-** 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)

- 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.)
- What is the duration of any proposed benefits and how they might be measured?
- 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.)

**TOTAL POSSIBLE POINTS FOR QUALITATIVE SECTION**

**60**

# Scoring Rubric Screenshot

## 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 of Request for Service from the local utility, or notice that project site utility coordination is being assessed for energy load capacity*

## 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 (not required).
  - 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.
  - ✓ Copy of email correspondence can satisfy this step.
  - ✓ 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").

### Proof of Make Ready

# Step 1: Submit Application

*CaaS Applicants Only - Proof of Ownership or Purchase Orders for MD/HD ZEV(s)*

## What's Inside the Document?

- Purchase Order Date.
- Purchase Order Number.
- Address of Infrastructure Project.

## What You Need to Complete It:

- ✓ CaaS vendors must provide proof of ownership or a purchase order (PO) for associated fleets.

# Purchase Order Reprint

Printed On: 6/8/2021  
Page: 1 of 2

Bill to: [REDACTED]  
[REDACTED]  
ATTN: Accounts Payable  
Phone: [REDACTED]

P.O. # [REDACTED] Branch/Plant: [REDACTED]

Vendor #: [REDACTED]  
Vendor Name: **New Flyer Industries**  
711 Kernaghan Ave.  
Winnipeg, Manitoba CN R2C 3T4  
  
Phone: (800) 665-2637  
Fax: (800) 745-5368  
Email: [REDACTED]  
Attn: [REDACTED]

Ship To: [REDACTED]

Original PO Date: 6/4/2021 Date Updated: 6/4/2021

**Purchase Order Terms and Conditions:**  
Seller is required to adhere to [REDACTED] Terms and Conditions which are provided at: [REDACTED]

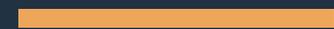
Line No.	Line Type	Change Order	Description / Supplier Item	Quantity Ordered	UOM	Unit Price	Extended Price
1.000	J	000	BEB Bus Purchase			.0000	[REDACTED]
Promised Date: 6/4/2021 Project Mgr: [REDACTED] NCTD Part #: [REDACTED] Vendor Part #: [REDACTED] Account Number: [REDACTED] Prime/Sub Name: [REDACTED] Req #: [REDACTED]				G/L Date: 6/4/2021 Work Order: [REDACTED] IFB/RFP Number: NO IFB/RFP # Fed Funds: Y Fiscal Year: [REDACTED] Taxable (Y/N): N Tax Type: U			
Inasmuch as this purchase is made with federal assistance, seller is required to adhere to all applicable Federal Transit Administration (FTA) clauses. Attachment 1 contains all applicable FTA provisions and [REDACTED] Purchase order Terms and Conditions. This order is placed under the provisions of the [REDACTED] (Attachment 2) and the Contractors Proposal (Attachment 3).							
2.000	J	000	BEB Bus Purchase			.0000	[REDACTED]
Promised Date: 6/4/2021 Project Mgr: [REDACTED] NCTD Part #: [REDACTED] Vendor Part #: [REDACTED] Account Number: [REDACTED] Prime/Sub Name: [REDACTED] Req #: [REDACTED]				G/L Date: 6/4/2021 Work Order: [REDACTED] IFB/RFP Number: NO IFB/RFP # Fed Funds: Y Fiscal Year: [REDACTED] Taxable (Y/N): N Tax Type: U			

Buyer: [REDACTED] Date: 6/8/2021  
Phone: [REDACTED] Email: [REDACTED]

## Example Proof of ZEV Ownership or Vehicle Purchase Order (CaaS Applicants Only)



# Step 2: Provide Supporting Documents



Public Charging Funding Lane

# EnergIZE Application Roadmap



Step 1



Step 2



## General Documents

- ✓ Copy of Purchase Order for Infrastructure Equipment.
- ✓ Milestone Payment Schedule and Request Form.

## Site Documents

- ✓ Preliminary Site Plans.
- ✓ Confirmation from local utility that project site is adequately prepared to receive the necessary energy.

## Other Documents

- ✓ Proof of Insurance from Contractor.
- ✓ EVITP Certification of Contractor or Subcontractor

EVTIP:  
Electric Vehicle  
Infrastructure  
Training Program

# Step 2: Provide Supporting Documents

## *Contractor Proof of License/Insurance*

### What's Inside the Document?

- Business Name.
- Business Address.
- 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.

# 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:

- ✓ 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 BY 8:00 AM-5:00 PM  
MONDAY-FRIDAY (CALL WITH A MINIMUM OF 14 CALENDAR DAYS)

GENERAL SYMBOLS AND ABBREVIATIONS	
SYMBOL	DESCRIPTION
	MAIN SWITCH-REQUIRED
	COMMERCIAL LEVEL 2 ELECTRIC VEHICLE CHARGING STATION
	CIRCUIT CONCEALED IN CEILING OR WALL, EXPOSED IN SERVICE MANSION
	CIRCUIT CONCEALED IN FLOOR OR UNDERGROUND
	HOSE/Run TO PARKING SPACE
	INDICATED FOR CONDUIT
	TRANSFORMER
	FALL BOX
	CONDUIT
	RACEWAY
	MAIN SWITCH-REQUIRED
	PANELBOARD
	EXISTING
	NEW
	EXISTING TO BE REMOVED OR RELOCATED
	WORK OTHERWISE NOTED
	MULTIDROPOUT—ONLY IN USE IN WET LOCATIONS WHERE APPLIES TO RECEPTACLES

SHEET LIST	
SHEET NUMBER	SHEET TITLE
C1.0	OWNER SHEET - SYMBOLS, CODE REFERENCES, SCOPE, GENERAL NOTES
E1.0	ONE LINE DIAGRAM, PANEL SCHEDULES, AND WIRING SHOP CALCULATION
E2.0	SITE PLAN
E3.0	EQUIPMENT DATA SHEETS AND MECHANICAL DETAILS
E4.0	EQUIPMENT DATA SHEETS, CONTINUED

CODE REFERENCES	
2019	CALIFORNIA ELECTRICAL CODE
2019	CALIFORNIA ENERGY CODE
2019	CALIFORNIA FIRE CODE INCLUDING 2019 NFPA 701 NATIONAL FIRE ALARM CODE AS NEEDED
2019	CALIFORNIA BUILDING CODE (CBC), PARTICULARLY CAL 11A AND 11B FOR ACCESSIBILITY
2019	ADA/ABA
2017	AND 2017
2016/2017	2016 AND 2017 CITY PARKING CODE
2016/2017	2016 AND 2017 CITY CODE

SCOPE	
CONDUIT OR RACEWAY SHALL BE INSTALLED TO ALL NEW AND EXISTING CHARGING STATIONS. CONDUIT SHALL COMPLY WITH ALL APPLICABLE CODES, AND SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS.	
NEUTRAL SHALL BE SEPARATE FROM THE INSTALLATION OF NEW STATION	
ELECTRICAL WORK SHALL BE INSTALLED PER THE FOLLOWING: (1) ALL ELECTRICAL WORK SHALL BE INSTALLED PER ALL APPLICABLE CODES AND REGULATIONS (2) ALL ELECTRICAL WORK SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS (3) ALL ELECTRICAL WORK SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS	

GENERAL NOTES	
1. ALL WIRING SHALL BE COPPER WITH 90% PURE THERMOPLASTIC OR OTHER INSULATION	
2. ALL WIRING SHALL BE IN CONDUIT OR RACEWAY PROTECTIVE FLEX	
3. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE CODES AND REGULATIONS. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS.	
4. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE CODES AND REGULATIONS. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS. CONDUIT SHALL BE INSTALLED PER ALL APPLICABLE REGULATIONS.	

VICINITY MAP - NOT TO SCALE	
AN OVERVIEW MAP OF THE PROJECT LOCATION	

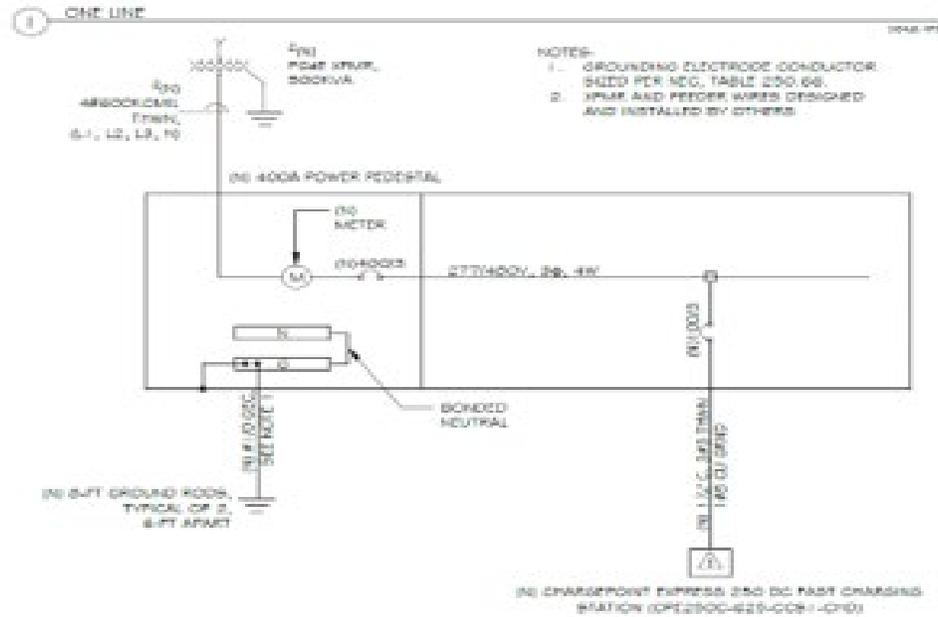
REVISIONS	
NO.	DESCRIPTION
1	ISSUE FOR PERMITS
2	ISSUE FOR PERMITS
3	ISSUE FOR PERMITS
4	ISSUE FOR PERMITS
5	ISSUE FOR PERMITS
6	ISSUE FOR PERMITS
7	ISSUE FOR PERMITS
8	ISSUE FOR PERMITS
9	ISSUE FOR PERMITS
10	ISSUE FOR PERMITS

THE CLIENT ELECTRIC ENGINEER & ARCHITECT  
 1000 PAVILLON BLVD  
 SUITE 200  
 REDWOOD CITY, CA 94061

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

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



**2 VOLTAGE DROP CALCULATION** DRAWING NO. 0000-000

VOLTAGE DROP WORKSHEET (SUPPLEMENT TO FORM NEEC-SEC-02-1, REFERENCE DOCUMENT 001)  
 90 = (1.1)(1.0)(0.8)(1.0)(1.0)(1.0)(1.0) \* (CORRECTION FACTORS)  
 100 = (1.0)(1.0)(1.0)(1.0)(1.0)(1.0)(1.0) \* (CORRECTION FACTORS)

CIRCUIT NO.	TYPE	VOLTS	PHASE	WIRE SIZE	LENGTH (FEET)	WIRE SIZE (AWG)	CORRECTED LENGTH (FEET)	AVERAGE CURRENT (AMPS)	VOLTS	%
1	100	480	3	75.2	30	40	30	0.00	0.00	0.00

**3 PANEL SCHEDULE** DRAWING NO. 0000-000

PANEL NO.	DESCRIPTION	POWER PEDIESTAL	WIRE RATING	TERMINAL	NEUTRALING	GROUNDING
NO.	NO.	NO.	NO.	NO.	NO.	NO.
1	100	100	100	100	100	100
2	100	100	100	100	100	100
3	100	100	100	100	100	100
4	100	100	100	100	100	100
5	100	100	100	100	100	100
6	100	100	100	100	100	100
7	100	100	100	100	100	100
8	100	100	100	100	100	100
9	100	100	100	100	100	100
10	100	100	100	100	100	100
11	100	100	100	100	100	100
12	100	100	100	100	100	100
13	100	100	100	100	100	100
14	100	100	100	100	100	100
15	100	100	100	100	100	100
16	100	100	100	100	100	100
17	100	100	100	100	100	100

PANEL TOTALS: ALN 1000.0, ANR 1000.0, ANR 1000.0, ANR 1000.0  
 BOARD BREAKER TOTALS: CONNECTED 1000.0, DESIGN 1000.0, DESIGN 1000.0, DESIGN 1000.0

REVISIONS

1	ISSUE	00
2	REVISED	00
3	REVISED	00

PANEL SCHEDULE ELECTRIC  
 DRAWING NO. 0000-000  
 DATE: 00/00/00  
 PROJECT: 000000

ELECTRIC VEHICLE CHARGING STATION INSTALLATION  
 CITY OF AUGUSTA  
 MACDONALD AVE & TEMPLE WAY  
 AUGUSTA, GA 30603

DATE: 00/00/00  
 SCALE: AS SHOWN  
 DRAWN: 00  
 CHECK: 00/00/00  
 SHEET: E1.0





# 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



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 # Credit Memo#12 CORE vouchers Customer approval Tax on Materials		
			Total		



# Example EVSE Purchase Order

**Invoice**  
Page: 1

Invoice  
Invoice Date: [REDACTED]

Bill To: [REDACTED]

Ship To: [REDACTED]

Due Date 1/12/2021  
Terms Net 20 Days

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

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 and Request Form*

### 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.

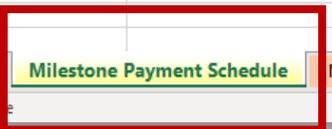
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Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

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	<b>Reviewed by</b>	<b>Date</b>							
31									
32									
33									
34									
35									
36									





# Step 3: Plan Project



Public Charging Funding Lane



# 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

County Clerk

County of: \_\_\_\_\_

From: (Public Agency): \_\_\_\_\_

(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.
- Property owner name, address, contact information.
- Description of work and property.

### What You Need to Complete It:

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

# Example Building Permit

## Commercial Building Permit Application

(To be entered by issuing agency)

Parcel #: \_\_\_\_\_ Permit Number: \_\_\_\_\_ Intake Person: \_\_\_\_\_

Project Address & Name:

Street: \_\_\_\_\_ Suite/Apt #: \_\_\_\_\_ City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Nearest Cross Street: \_\_\_\_\_ Business Name: \_\_\_\_\_

Name of Applicant: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Name of Contractor: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Contractor's License Number: \_\_\_\_\_ Classification: \_\_\_\_\_

Name of Owner: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Name of Architect/Engineer: \_\_\_\_\_ License #: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Nature of Work:  New Construction  Shell (New)  Alteration  Demolition  Misc. PM&E  T.I. (First Time)  Commercial Coach

Inspection Disciplines:  Building  Mechanical  Plumbing  Electrical  Engineering (Check all that apply)

Description of Work:

Number of Stories?	Number of Units?	Type of Construction?	Fire Sprinklered?	Existing Use?	Proposed Use?	Is Building Conditioned?
			<input type="checkbox"/> Yes <input type="checkbox"/> No			<input type="checkbox"/> Yes <input type="checkbox"/> No
Square Footages →	New Added Square Footage?	Office Square Footage?	Retail Square Footage?	Warehouse Square Footage?	Roofing Squares?	Square footage Other: _____

Valuation: \$ \_\_\_\_\_ The applicant for a permit shall provide an estimated permit value at time of application. Permit valuations shall include total value of work, including materials and labor, for which the permit is being issued, such as electrical, gas, mechanical, plumbing equipment and permanent systems, if, in the opinion of the building official, the value is underestimated on the application, the permit shall be denied, unless the applicant can

# Step 3: Plan Project

*Copies of Paid Invoices Showing Eligible Costs Incurred (if Requesting Milestone Payment)*

## What's Inside the Document?

- Address of Infrastructure Site.
- Date of transaction.
- Installed Infrastructure.
- Serial numbers for all equipment.

## What You Need to Complete It:

- ✓ Complete invoices showing eligible costs incurred.

# 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

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]	

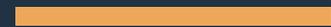
PAID  
4/30/18

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

# Example Invoice



# Step 4: Initiate Construction



Public Charging Funding Lane

# EnergIIZE Application Roadmap



## Site Documents

- ✓ Copy of Signed Inspections Sheet and Closed Building Permit.
- ✓ Copy of paid invoices showing eligible costs incurred (if requesting milestone payment).
- ✓ Milestone Payment Schedule and Request Form (if needed).

# 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.
- Description of Work.

## What You Need to Complete It:

- ✓ Coordination with property owner and contractor.

# Step 4: Initiate Construction

*Copies of Paid Invoices Showing Eligible Costs Incurred (if Requesting Milestone Payment)*

## What's Inside the Document?

- Address of Infrastructure Site.
- Date of transaction.
- Installed Infrastructure.
- Serial numbers for all equipment.

## What You Need to Complete It:

- ✓ Complete invoices showing eligible costs incurred.

# 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]	

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



# Step 5: Commission Project



Public Charging Funding Lane

# EnergIZE Application Roadmap



Step 1



Step 2



Step 3



Step 4



Step 5

## General Documents

- ✓ Copy of Third-Party Network Provider Communications Contract.
- ✓ Verification of Recharging.
- ✓ For EVSEs: RSA certification of Level 2 Charging (where necessary).
- ✓ Copies of final invoices.
- ✓ Photo of serial number for all serialized equipment installed on project site.
- ✓ Photos of equipment and site.
- ✓ Milestone Payment Schedule and Request Form.

# 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 Final Paid Invoices*

### What's Inside the Document?

- Address of Infrastructure Site.
- Date of transaction.
- Installed Infrastructure.
- Serial numbers for all equipment.

### What You Need to Complete It:

- ✓ Complete invoices showing eligible costs incurred.

# 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]

# Step 5: Commission Project

## *Milestone Payment Schedule and Request Form*

### What's Inside the Document?

- Overview of the Milestone payment schedule and requirements.
- Instructions for how to fill out document.
- Milestone Payment tabs within the Excel file.

### What You Need to Complete It:

- ✓ Invoice(s) and proof that the invoice was paid.
- ✓ Payments, date of payment, completion date.

# Final Payment Request

Applicant Information		Incentive ID	Date	Request No.
[Organization]		[Incentive ID]	[FILL IN]	FINAL
[Address 1]				
[Email]				
Description of Invoice (add additional rows for additional invoices)	Award Total	Incurred Costs for this Milestone	Incurred Costs to Date	Award Balance
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Amount payable to applicant</b>		<b>Exceeds Award Amount</b>		
I certify to the best of my knowledge and belief that this report is correct and complete and all outlays and obligations are for the purposes set forth in Energize.			<b>CALSTART Use Only</b> Amount Authorized: Check # Check Date Tracking #	
Signature of Certifying Officer		Date		
Type or Print Name and Title		Phone		



## Milestone Payment Request

# Step 5: Commission Project

## *Photographic Evidence of the Site*

### What's Inside the Document?

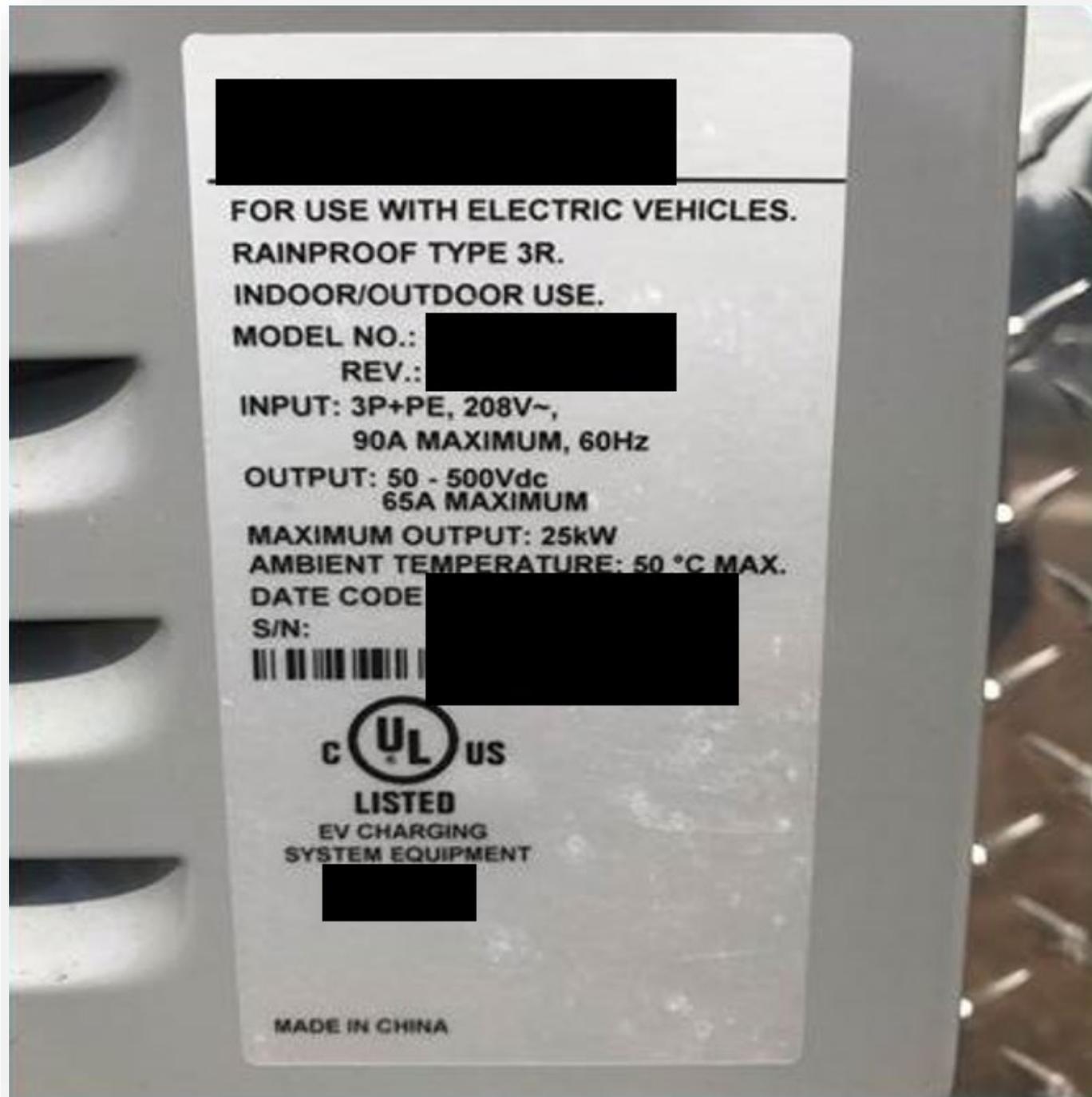
- Photos of installed equipment on site.

### What You Need to Complete It:

- ✓ Pictures showing:
  - ✓ Installation of Serialized Electric Vehicle Supply Equipment (EVSE).
  - ✓ Other equipment such as Meter Mains and Transformers.
  - ✓ Americans with Disabilities Act (ADA) Compliance.
- ✓ Serial numbers on the installed equipment.
- ✓ Installed equipment in context with site.

# Example Pictures

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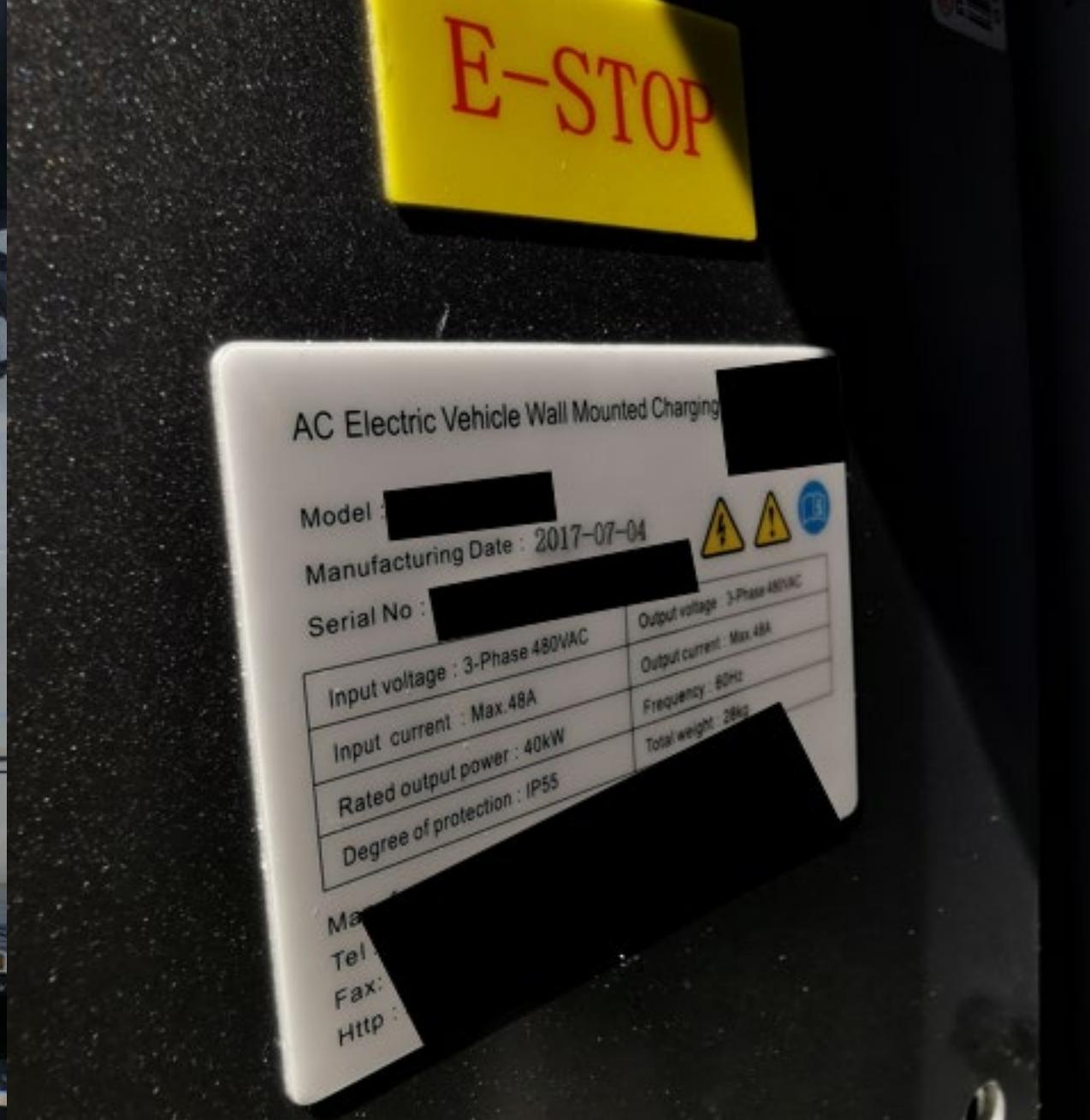
# Example Pictures

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## Example Pictures



# Public Charging: Application Checklist



- 1 EnergIIZE Application for Public Charging (now online)
- 2 Proof of cost share and supporting documentation
- 3 Proof of Ownership or Site Verification Form
- 4 Signed copy of EnergIIZE Terms and Conditions

All forms can be accessed at the EnergIIZE Home page ([energiize.org](https://energiize.org)), or by [clicking here](#).

# Public Charging: Application Checklist (Continued)



- 5** Confirmation of request for service from the local utility or evidence of coordination, such as:
  - Proof of Participation in Utility Make-Ready Programs
  - Copy of Request for New Service from Utility
  - Evidence of communication with Utility
- 6** **Proof of ownership or purchase orders for MD/HD ZEV for associated fleets** (CaaS applicants only)
- 7** Jump Start Certification Form (if eligible)
- 8** Answers to Qualitative Questions (if applying for over \$150,000)



# Frequently Asked Questions

# You Might Have These Questions

**Q:** *When does the Public Charging lane open for applicants?*

**A:** Applications will be accepted beginning at 9:00 a.m. Pacific Time October 14, 2022. This is a competitive process, NOT first-come, first-served. The application window is open from October 14 to 5:00 p.m. Pacific Time October 28.

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

**A:** Once Public Charging applicants have been provided with their notice of conditional award after completion of Step 1, they will then have 60 calendar days to provide the information in Step 2.

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

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



Q&A

# Contact Us

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877-ENR-GIZE  
877-367-4493



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



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



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