

DOCKETED

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EnergIIZE Charging as a Service Cost Reimbursement Workshop Slides and Recording

EnergIIZE Commercial Vehicles Project Charging as a Service (CaaS) Cost Reimbursement Workshop slide deck below from October 20, 2022 presentation.

A recording of the workshop is viewable at the link below.
<https://www.youtube.com/watch?v=ScbHmVwwVu0>

Additional submitted attachment is included below.



EnergiZE Workshop
Cost Reimbursement
Charging as a Service (CaaS)

October 20, 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/84756108314?pwd=cTd4cDFac3pISEhLbzVGVG5rWVdSZz09>

Webinar ID: 847 5610 8314

Passcode: 296510

Mobile:

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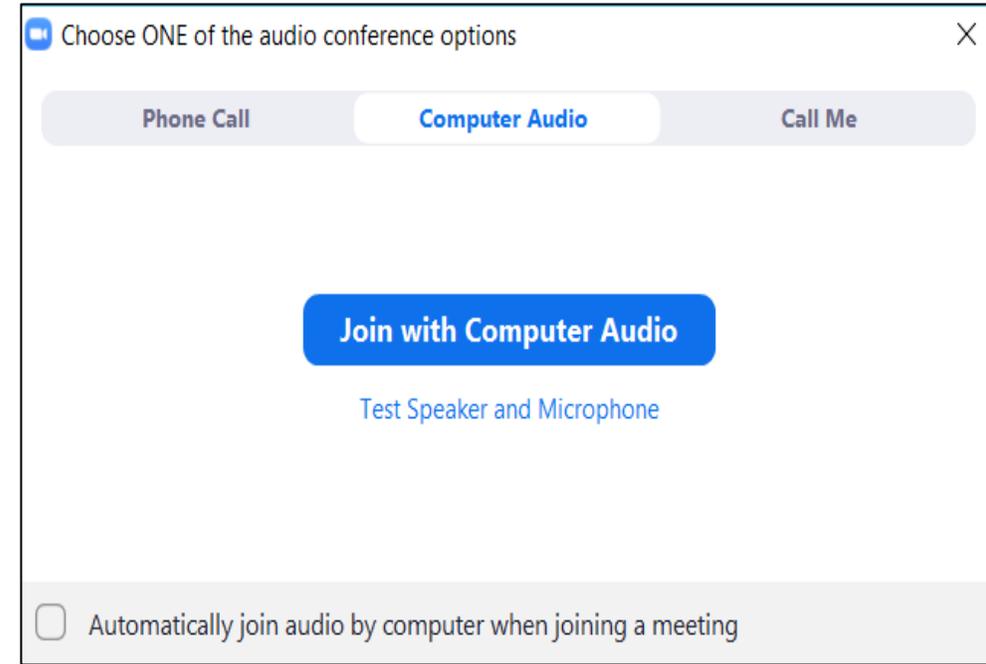
+16699006833,,84756108314# US (San Jose)

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.

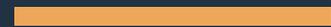
If you have questions, you can use the Q&A function.

Agenda

- 1** **EnergIIZE Public Charging Lane Overview**
- 2** **EnergIIZE CaaS Overview**
- 3** **Requirements**
- 4** **Exclusions**
- 5** **Q&A**



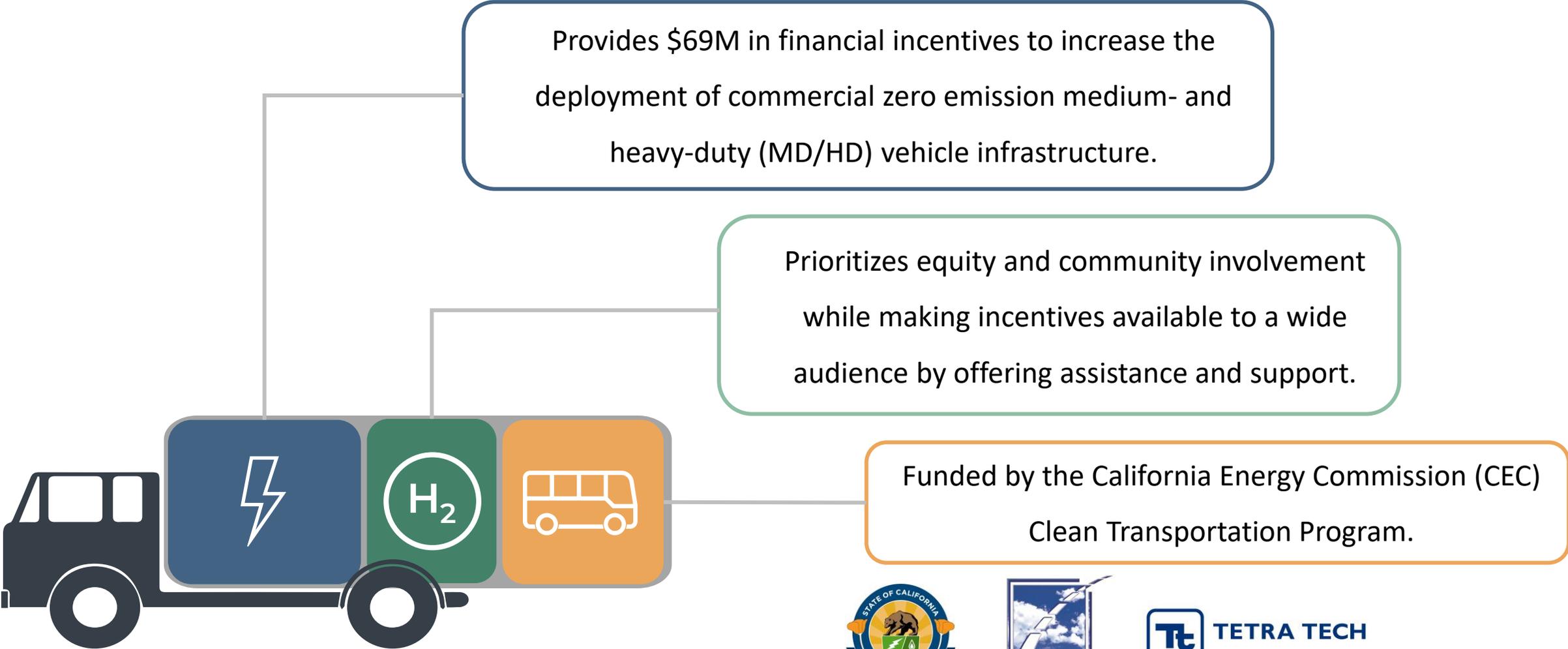
Overview



EV Public Charging Funding Lane
CaaS Applicants

Overview of EnergIZE

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.



Public Charging Lane Continued



- **Who is eligible:**

- Applicant is an electric vehicle (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 CaaS.
- Energize reserves the right to adjust this breakdown dependent after receipt of applications.

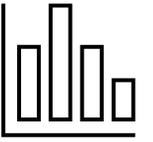
CaaS Definition

- 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.

CaaS Overview

- As a trial/pilot, EnerGIIZE will accept CaaS 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.

Poll Question #1



What industries do your clients represent?

- A. Automotive/
Vehicle
- B. Freight/ Delivery
- C. Independent
Owner/ Operator
- D. Nonprofit
- E. Real Estate
- F. School Bus
- G. Transit
- H. Other Government
- I. Utility
- J. Other

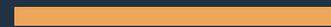
CaaS Eligible Costs



- EVSE, including Level 2 and DCFC
- Transformers
- One-time network costs
- Switchgear, meter mains, and circuit breaker panels
- Utility service upgrades (e.g., amperage upgrades to infrastructure site)
- Stub-outs for future EVSE pedestals need to match the business case, utility capacity, and fleet coordination.
- Third-party network providers



Requirements



EV Public Charging Funding Lane
CaaS Applicants

CaaS Requirements



CaaS vendors who provide EV charging infrastructure as a service to a fleet should be prepared to provide applicants with:

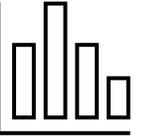
- Turnkey operation
- Ready to operate EVSE that allows fleet MD/HD vehicles to pull in and charge ZEV battery
- Site maintenance
- Functional validation
- Site remediation
- Network upgrades
- Cable Management Systems with connectors and cord upkeep



Administrative Fee



EV Public Charging Funding Lane
CaaS Applicants



Poll Question #2

How comfortable are you with accounting terms (on a scale of 1-5)?

- A. 1 - Not comfortable at all
- B. 2
- C. 3
- D. 4
- E. 5 - Very comfortable

CaaS Administrative Fee



- CaaS vendors who provide EV charging infrastructure as a service to a fleet may seek a maximum 7% administrative fee.
- The administrative fee cannot exceed 7% of total project costs.



- In exchange for administrative fee, CaaS vendors must agree (for minimum 5 years) to full responsibility for charging infrastructure:
 - Project management
 - Installation
 - Construction
 - Operation
 - Maintenance

CaaS Administrative Fee Example

- Fleet A may seek CaaS from Company C.
- The administrative fee cannot exceed 7% of total costs.

Example:

$$\$500,000 \times 0.07 = \$35,000$$

*Administrative
fee*

CaaS Administrative Fee Calculation

- **General and administrative (G&A) expenses** represent the cost of activities necessary to the overall operation of the business, where no direct relationship to any particular cost object (e.g. a program, grant, an activity, etc.) can be identified.
- **Direct costs** are allowable costs incurred that can be attributed to a specific final cost object.
- Calculating Administrative Fee, or G&A rate:

Total G&A Expenses

Total Direct Costs

CaaS Example G&A Expenses



- Accounting costs
- Administrative payroll costs
- Business development costs
- Legal costs
- Insurance costs
- Human Resources costs

Total G&A Expenses

Total Direct Costs

Note – These are examples, not financial advice. Please verify your expenses with your Accounting team.

CaaS Example Direct Costs



- Project management.
- Equipment costs.
- Network costs.
- Salesforce subscription.

Total G&A Expenses

Total Direct Costs

Note – These are examples, not financial advice. Please verify your expenses with your Accounting team.

CaaS Example Unallowable Costs



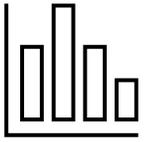
- Alcoholic beverages
- Bad debts
- Charitable contributions
- Fines and penalties
- Lobbying

CaaS vendors may find more information in 2 CFR Part 200 [here](#).



Q&A

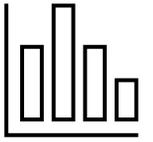
Poll Question #3



How helpful was this workshop (on a scale of 1-5)?

- A. 1 - Not very helpful
- B. 2
- C. 3
- D. 4
- E. 5 - Very helpful

Poll Question #4



What additional workshop topics would you like to see?

Contact Us



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