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**Presentation for the CALeVIP Construction Progress Tracker
Training Webinar**

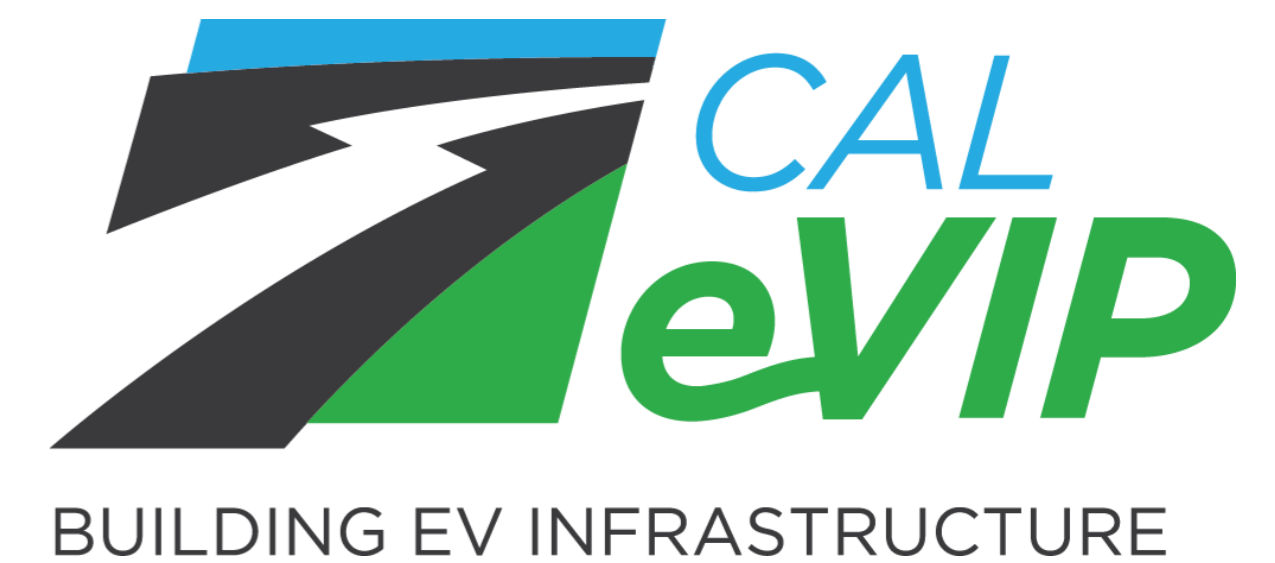
Additional submitted attachment is included below.

CALeVIP Construction Progress Tracker Training

Construction Progress Tracker (CPT)
Using Teamwork

FEBRUARY 16, 2023

Rob Taylor
Senior Manager EV Infrastructure

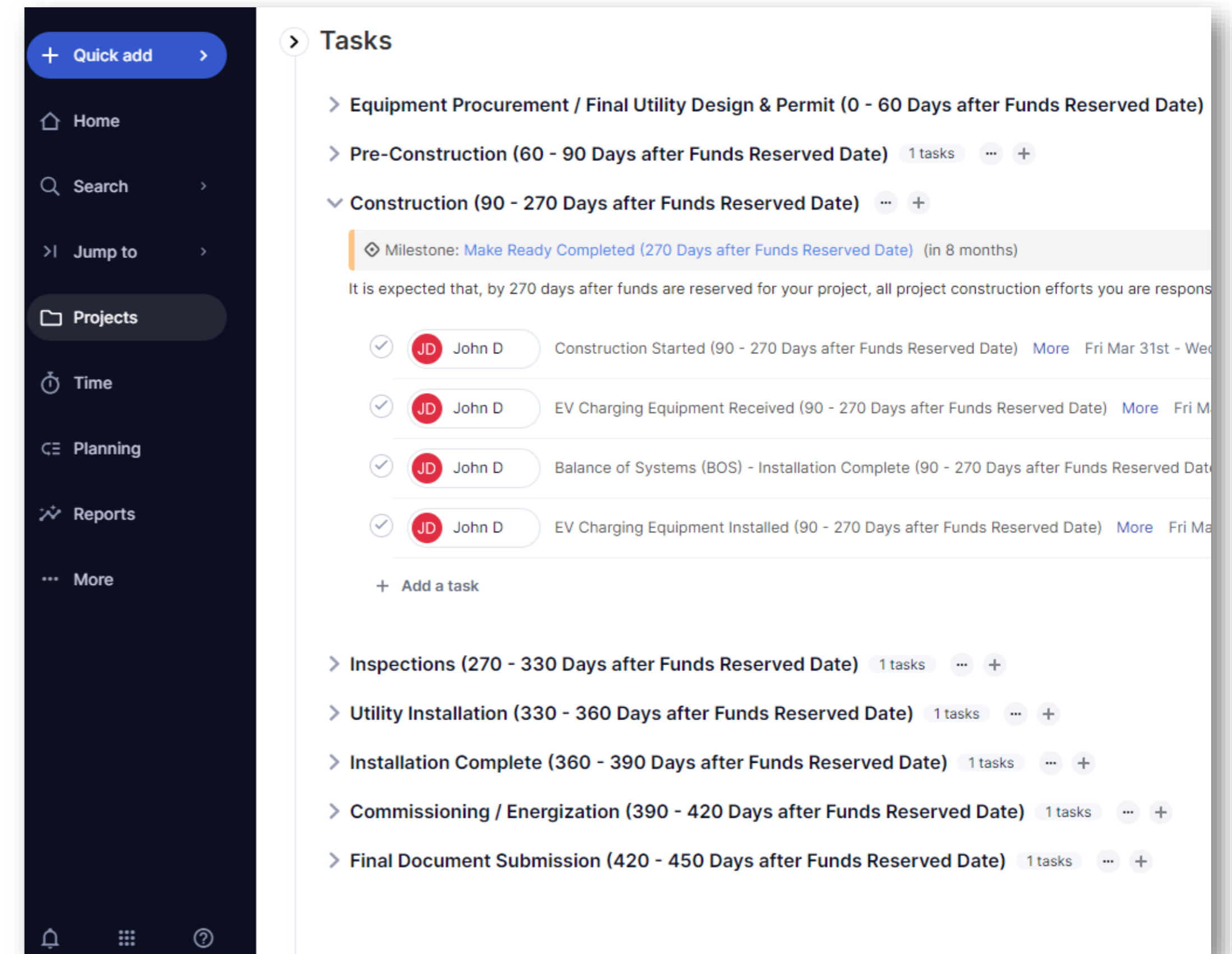


Implemented by CSE for the
California Energy Commission



Training Agenda

1. What is the CPT?
2. Signing Up
3. Using the CPT
4. Applicant Responsibilities & Program Requirements
5. Resources
 - a. User Guide
 - b. Optional Mobile App
6. Q&A



What is the Construction Progress Tracker (CPT) ?

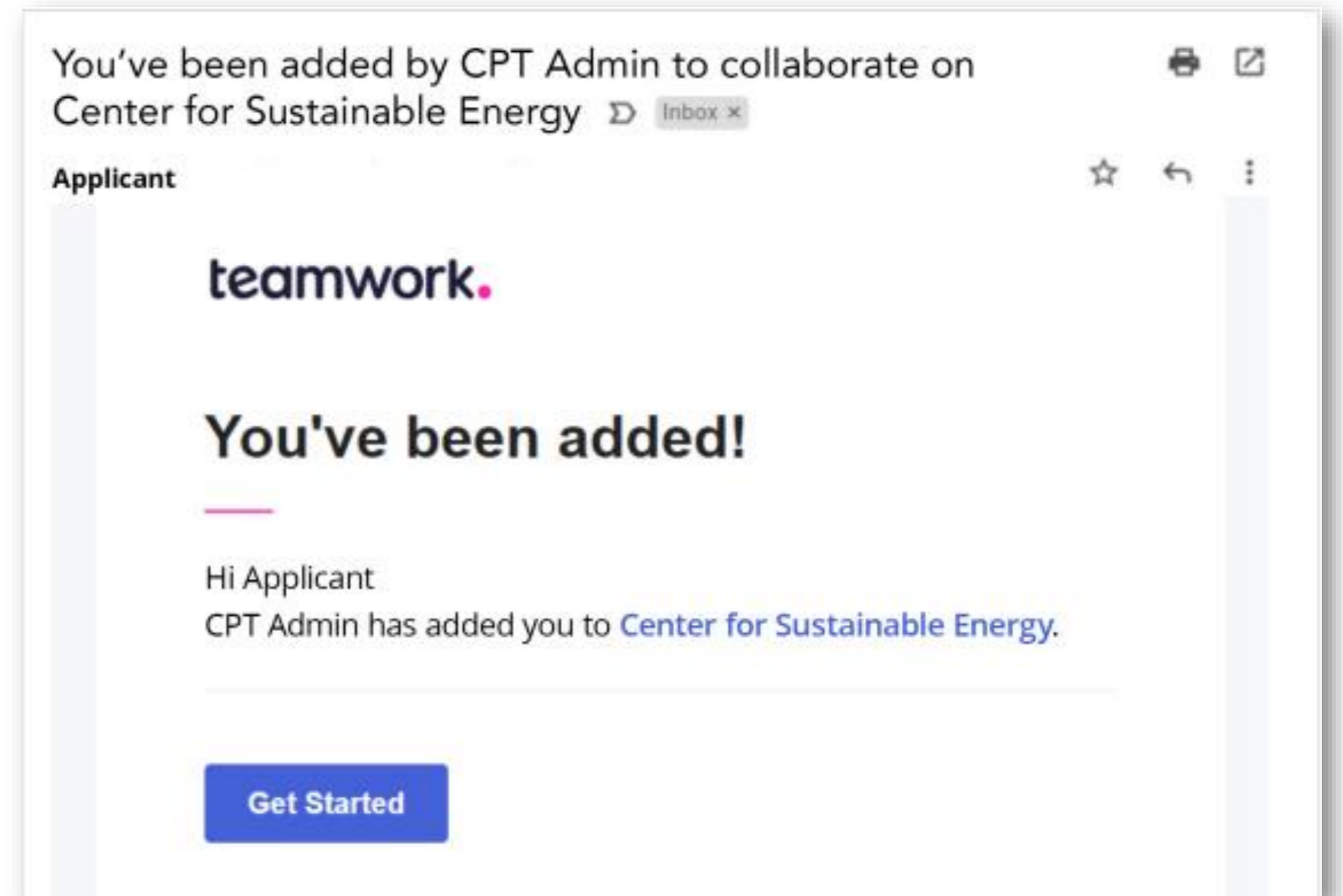
- **New tool** implemented in CALeVIP Block Grant 2.0 (BG2.0).
- **User-friendly tool** allows applicants to track project progress against an estimated construction timeline.
- **Applicants are required** to accept invite and create a Teamwork account within 5 calendar days of emailed invite.
- **Applicants will update** construction tasks and milestones in the tool once completed in the field.
- **Project progress** can be viewed as a timeline or Gantt chart against an estimated construction timeline.
- **Provides insight** to help determine the acceptance of an extension request, if necessary.



Signing Up

Applicant will initially (on day 1 of funding):

- Receive funding notification from CSE.
- Receive an email with Teamwork directions from CSE.
- Sign into Teamwork using emailed link and create account.
 - Requires password only, no personal info.
- Applicants would be required to sign up within 5 business days.



Using the CPT: Tasks & Milestones

- **Tasks** are different phases of the construction project with estimated time frames.
- **Milestones** mark significant dates that align with an assumed typical construction schedule.

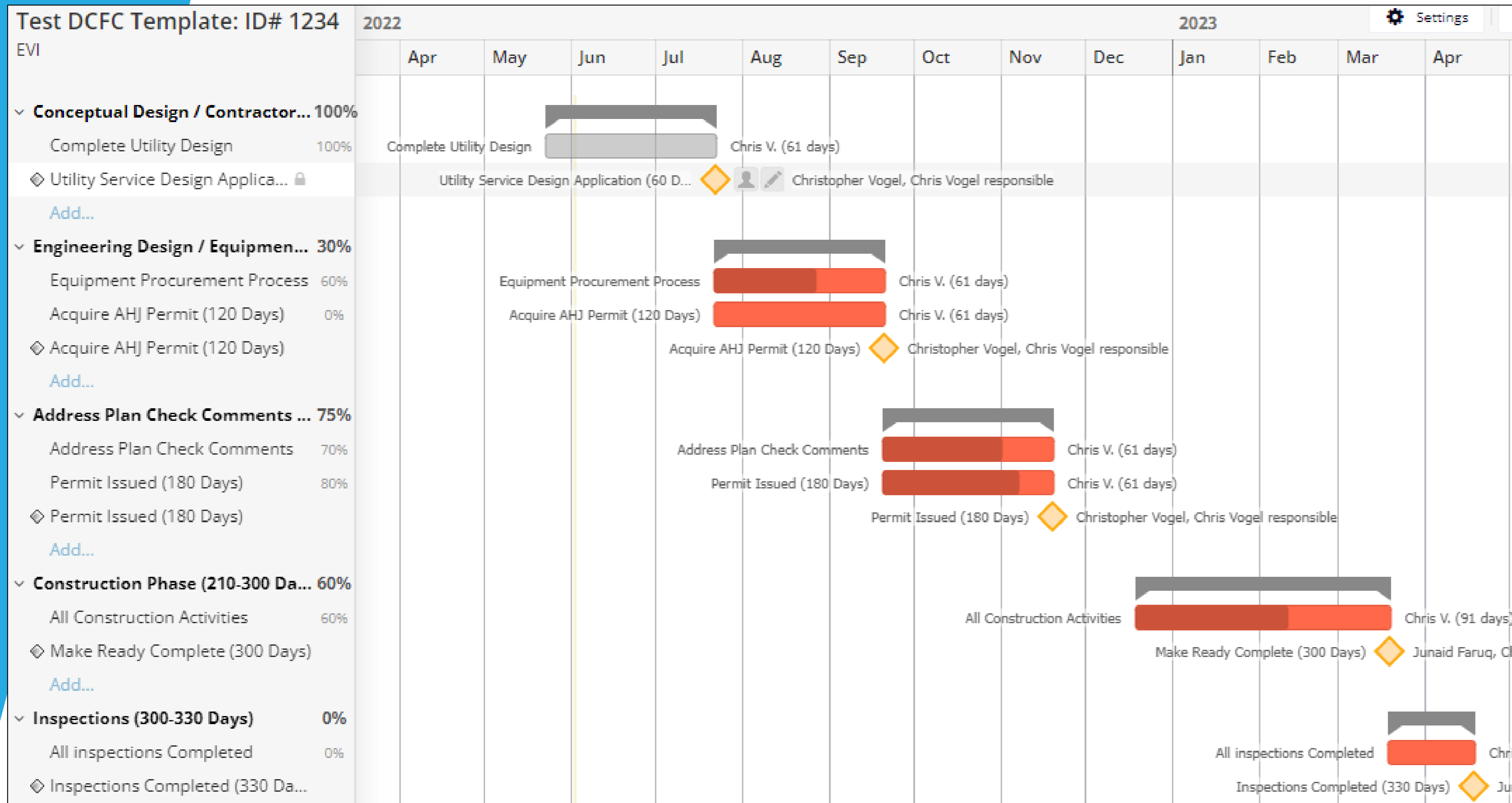
The screenshot displays a software interface for managing construction tasks and milestones. The top section, titled "Tasks", features a search bar for "Assignee or task name", a "+ Add Task List" button, and icons for user selection, filtering, and more options. Below this, a list of task categories is shown, each with a chevron icon, a task count, and a plus icon for expansion:

- Equipment Procurement / Plan Check Comments (0 - 60 Days) 3 tasks
- Pre-Construction (60 - 90 Days) 1 tasks
- Construction Phase (90 - 270 Days) 7 tasks
- Inspections (270 - 330 Days) 1 tasks
- Utility Installation (330 - 360 Days) 1 tasks
- Installation Complete (360 - 390 Days) 1 tasks
- Commissioning / Energization (390 - 420 Days) 1 tasks
- Final Document Submission (420 - 450 Days) 2 tasks

The bottom section, titled "Milestones", includes a "List" dropdown, a filter icon, and a "More" icon. It shows two tabs: "All" (5) and "Upcoming" (5). The "Upcoming" tab is active, displaying a calendar view for August 29, Monday. A milestone is highlighted with an orange background, indicating it is 66 days away:

- Final Utility Design & Issued Permit (60 Days)** 66 days away
- Joe D. responsible
- Required upload of documentation associated with the final utility design and issued permits.
- Required Document**
- 0% Complete
- Equipment Procurement / Plan Check Comments (0 - 60 Days) [Detach](#)

Using the CPT: Gantt Chart




- A Gantt chart is also available to view progress during timeline.
- Shows both tasks and milestones.
- Completed tasks are shaded grey.
- % progress is represented by shaded part of task bar.

Notifications & Progress Questionnaires

- **Automated email notifications** will alert applicants of upcoming tasks 15 days prior to expected completion date. Milestone reminders will be sent 1 day prior to expected completion date.
- **Progress questionnaires** will collect basic progress information starting at day 120 and every 90 days thereafter.

Teamwork notification by email

|Sample Project #1234| - Milestone Reminder - Equipment is Commissioned and Energized is due

 Center for Sustainable Energy <do-not-reply@teamwork.com>
to me ▾

===== THIS IS AN AUTOMATED EMAIL. REPLIES WILL BE DISCARDED =====

teamwork.

Hi Chris. This is a reminder that you have a milestone due tomorrow.

Equipment is Commissioned and Energized

Due: 05/31/2022

Project: Sample Project #1234

Company: CALeVIP

[View this milestone >](#)

THIS IS AN AUTOMATED EMAIL - PLEASE DO NOT REPLY TO THIS EMAIL

P.S. Just in case: You can reset your password by [clicking here](#)

[← Reply](#) [→ Forward](#)

Teamwork notification emails on mobile

teamwork.

Christopher Vogel has assigned a milestone to you

MAY 27 **Construction Complete**

Construction should be completed by 5/27/22

Milestone Details

Due Date: 05/27/2022

Assigned To: Chris Vogel

View Milestone: [Construction Complete](#)

Project Details

Project: [Sample Project #1234](#)

Company: CALeVIP

Copied To: Chris Vogel

529 (Sample Project #12...)

teamwork.

Christopher Vogel has assigned a task to you.

Construction Efforts for EVI Installation — [View](#)

This task is associated with all phases of construction and the installation of your charging equipment.

Task Details (#28603168)

Start Date: 05/28/2022

Due Date: 05/28/2022

Assigned To: Chris Vogel

Assigned By: Christopher Vogel

Priority: Medium

Tags: **Estimated Date**

Task List: [Construction Phase](#)

View Task: [Construction Efforts for EVI Installation](#)

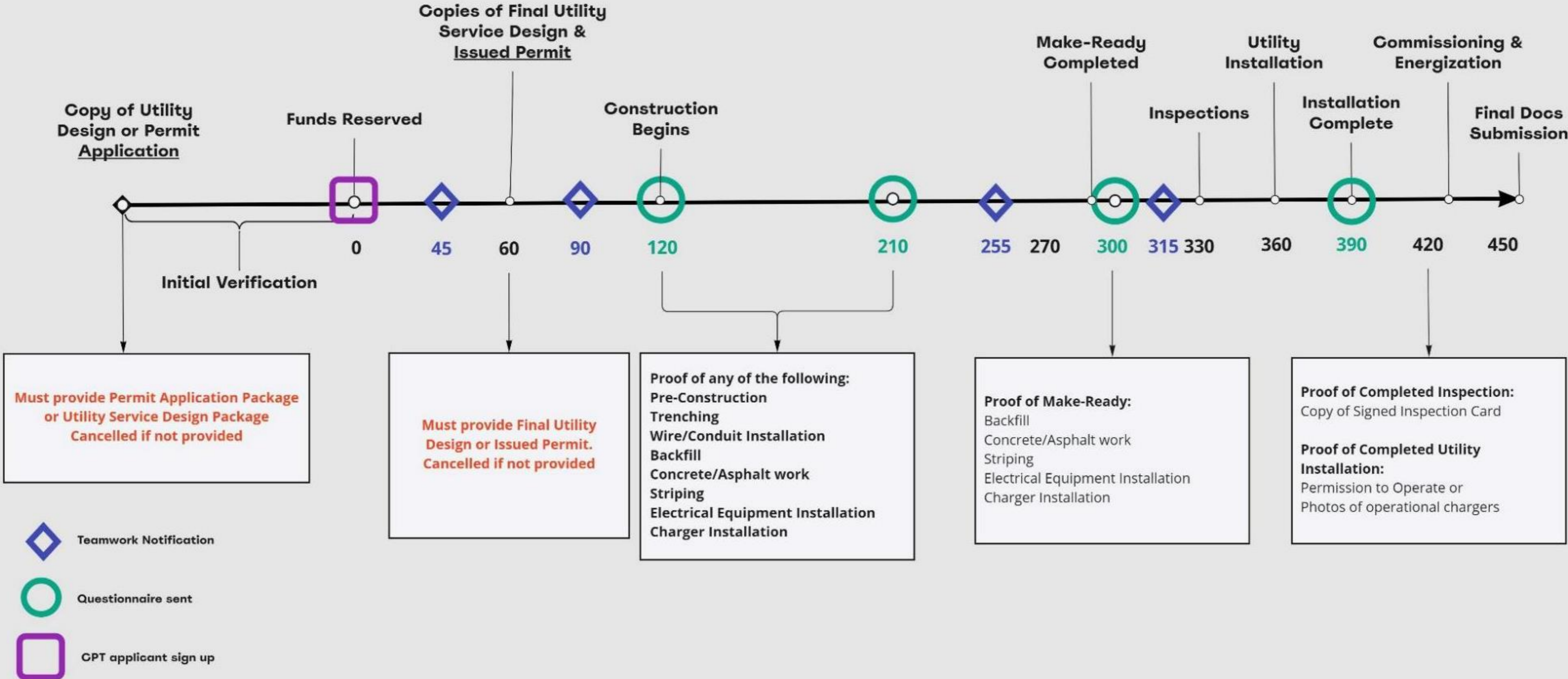
Project Details

Project: [Sample Project #1234](#)

Company: CALeVIP

Copied To: Chris Vogel

Standard DCFC 450-Day Timeline



Applicant Responsibilities

The CPT is required for all BG2.0 projects that have Funds Reserved.

*** The CPT is also required for BG1.0 projects that receive an approved extension after 1/16/23 or move into Funds Reserved after 2/21/23. ***

Applicant minimal responsibilities in Teamwork:

- ✓ Accept invite to their project.
- ✓ 5 Major Milestones to mark as complete.
- ✓ 16 Subtasks to mark as complete.

Applicant will be expected to:

1. Apply for funding and provide initial documents (prior to funding approval).
2. Create a Teamwork account and read CSE issued directions (day 1 of funding).
3. Provide final Utility Service Design or Issued Permit (day 60).
4. Update project task progress and completion of milestones in Teamwork (throughout timeline).
5. Mandatory questionnaire responses (day 120, 210, 300 and 420).
6. Final documentation submission (day 450).

Resources: User Guide

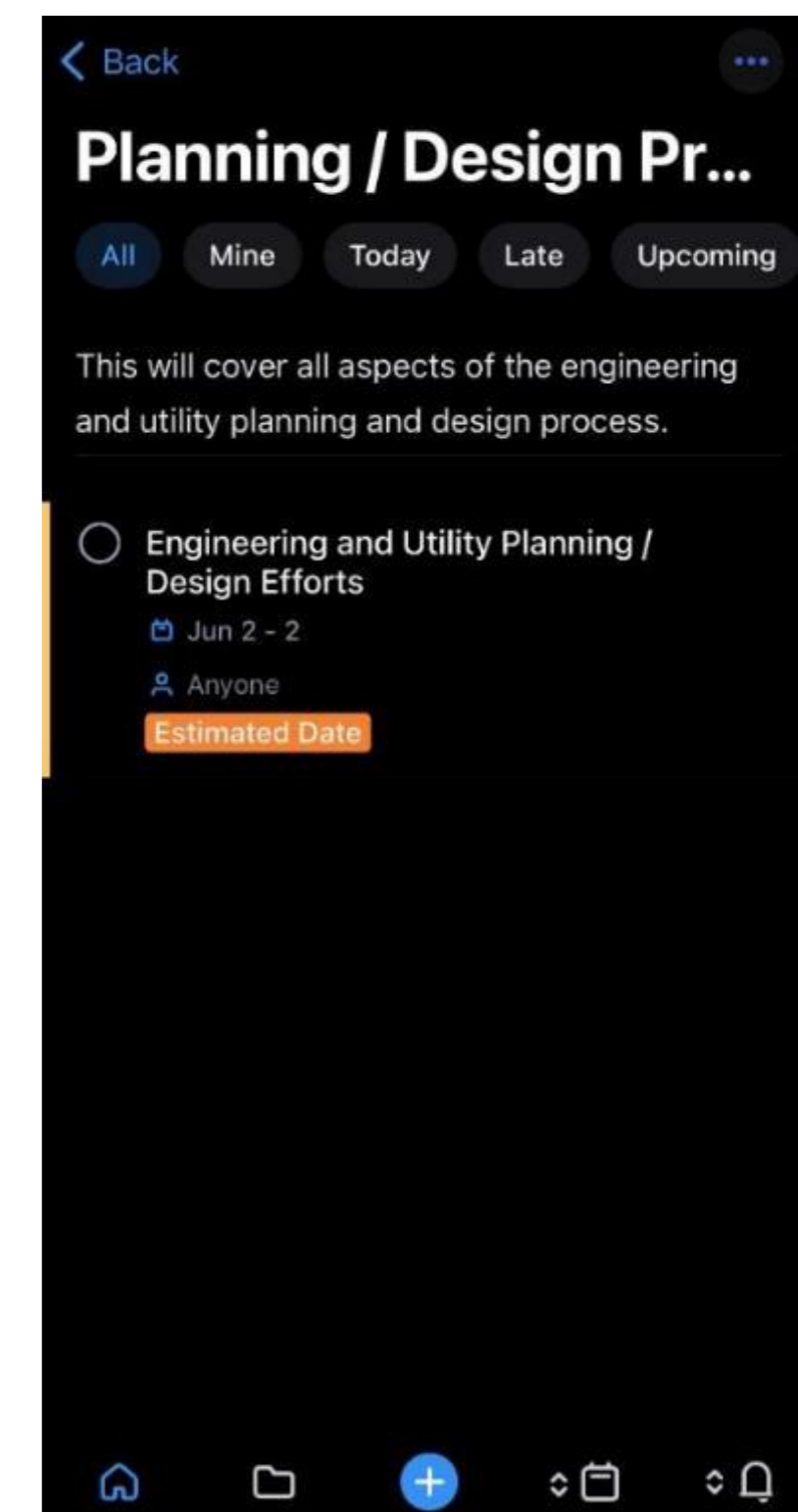
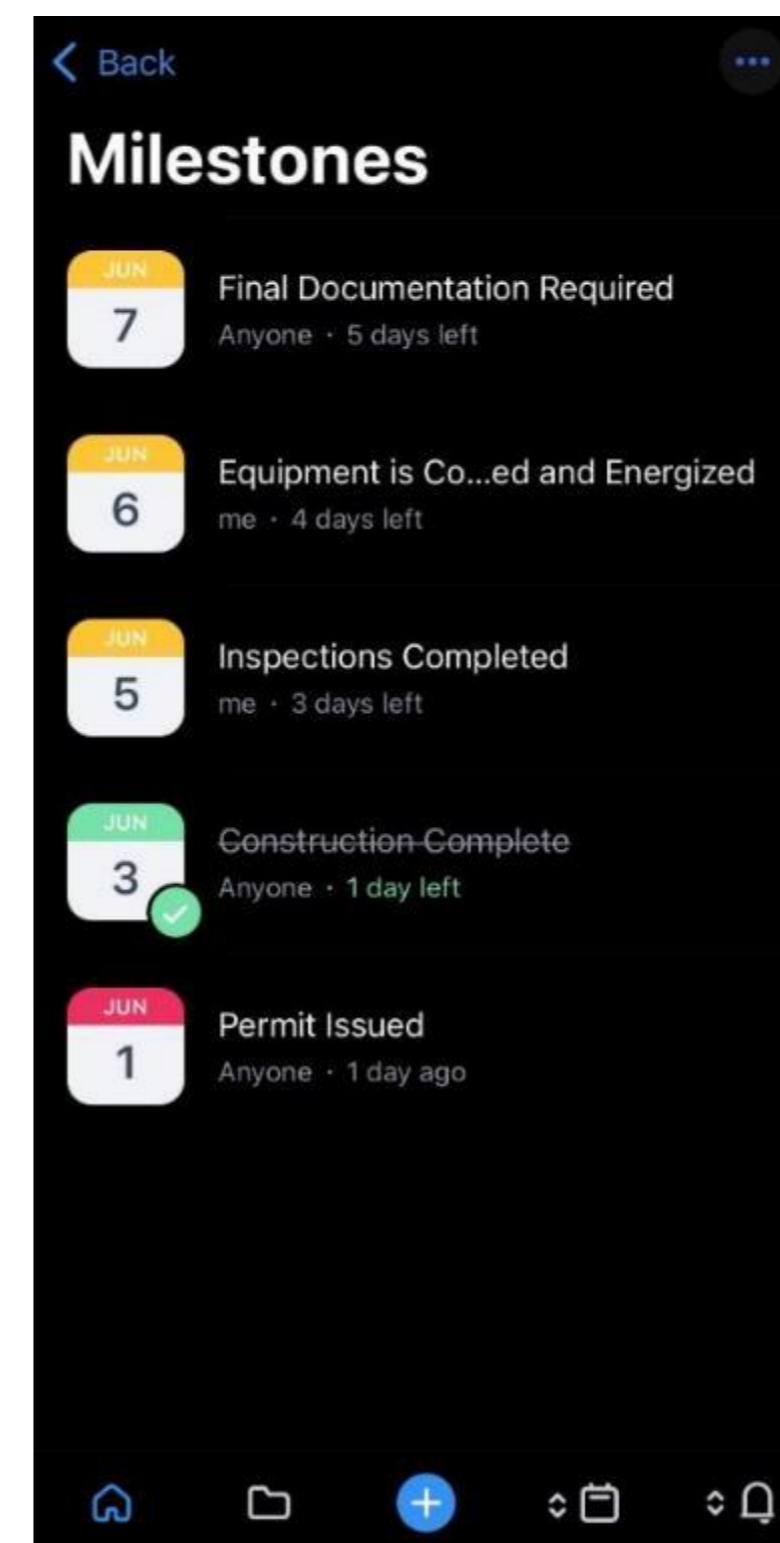
- Will be emailed to all attendees of this webinar.
- Available on CALeVIP website at calevip.org/document-library.
- PDF provided with initial invite to the CPT.

CONTENTS

1. Construction Timelines - CALeVIP 1.0	3
Level 2 Charger Projects (CALeVIP 1.0).....	3
DCFC Charger Projects (CALeVIP 1.0).....	4
2. Construction Timelines - CALeVIP 2.0	5
DCFC Charger Projects (CALeVIP 2.0).....	5
3. Construction Progress Tracker Overview	6
4. Applicant Expectations	7
5. Accepting CPT (Teamwork) Invite & Setting Up Account.....	9
6. Navigating Teamwork	11
Home Menu in Teamwork	11
Project Menu in Teamwork.....	12
7. Task & Milestone Reminders.....	13
8. Updating Tasks & Milestones	15
9. Viewing Project Progress	17
Viewing Progress as a Timeline.....	17
Viewing Progress as a Gantt Chart.....	18
10. CALeVIP Dashboard vs. Teamwork Expectations	19
11. Handling Multiple Projects	20
12. FAQs.....	21
13. Links.....	22

Resources: Optional Mobile App

If you choose, you can use a mobile Teamwork app to access all active projects to complete tasks and milestones.



Questions & Answers



**Please submit all questions
through the chat now.**

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