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Document Title:	Presentation - EnergIIZE's Drayage Fleet and Transit Set-Aside Application Process
Description:	EnergIIZE Commercial Vehicles Project Drayage Fleet and Transit Set-Aside Application Workshop slide deck from July 13, 2023 presentation. A recording of the workshop is viewable at the link below. https://www.youtube.com/watch?v=9P6sfFKdT5M
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EnergiZE Workshop

Drayage Fleet and Transit Set-Aside Funding
Application Process

July 2023

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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Agenda

1 Overview

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Walkthrough of Drayage Fleet and Transit Set-Aside Funding Application Process

Step 1. Submit Set-Aside Application

1.1 EnerglIZE Application

1.2 Site Verification Form

1.3 Preliminary Site Plans

1.4 Sample EnerglIZE Terms and Conditions

1.5 Confirmation of Request for Service

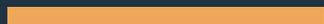
1.6 Additional Supporting Documents

3

Closeout



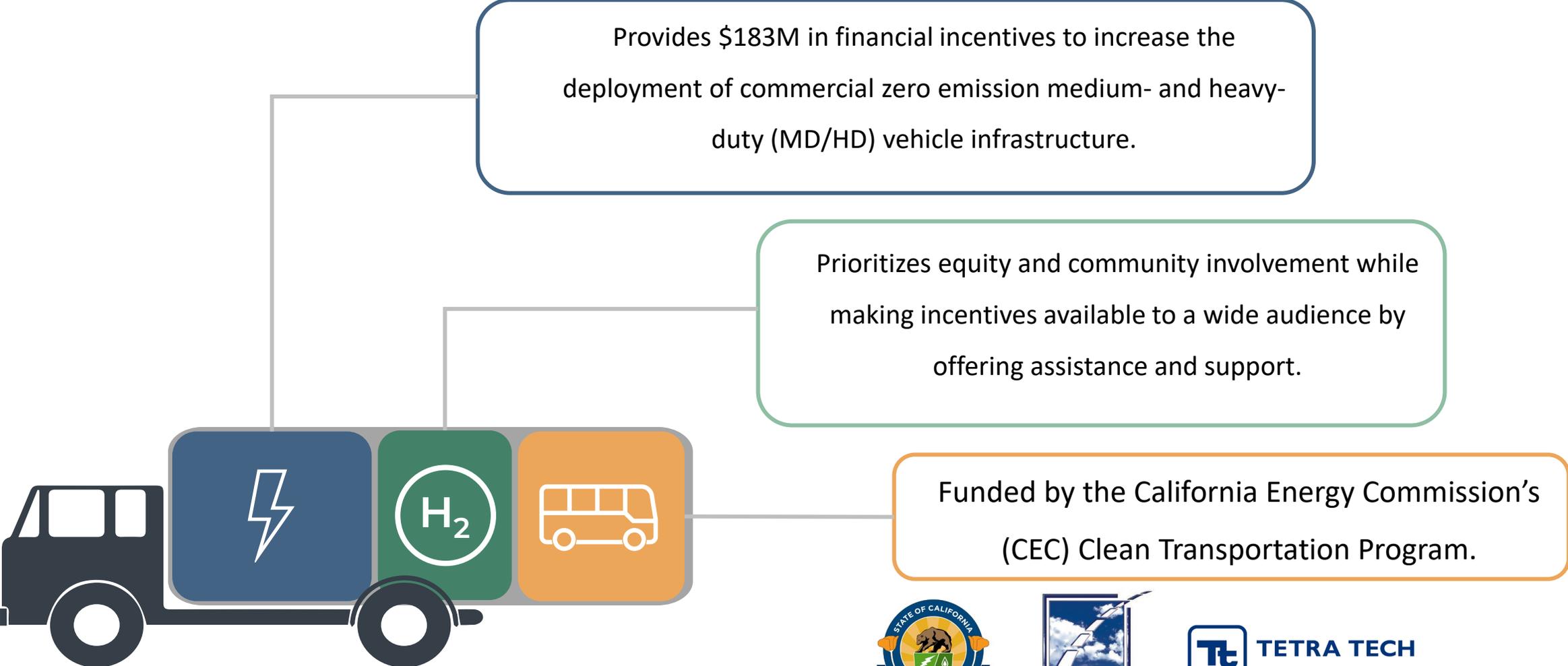
Overview



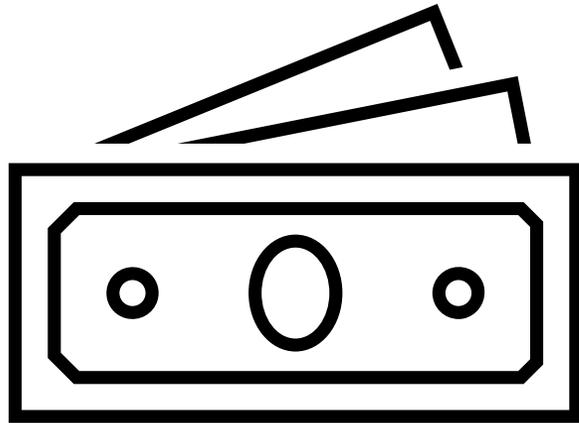
Drayage Fleet and Transit Set-Aside Funding Lane
Opening July 27, 2023

Overview of EnerglIZE

Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles



Funding Set Aside For Drayage Fleet and Transit Infrastructure



- Funding has been set aside for drayage fleet and transit infrastructure through EnerglIZE.
- **Drayage Fleet** - Applicants must have requested incentives through HVIP (Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project), funded by the California Air Resources Board (CARB).
- **Transit** – Applicants may first submit incentive application through EnerglIZE or voucher request through HVIP.

Transit Set-Aside Funding Lane

The Transit Set-Aside funding lane pairs HVIP vehicle funding with EnergiIZE infrastructure funding. Applications are scored on criteria demonstrating infrastructure utilization, cost effectiveness, and community benefit.

When can I apply?



- Funding window open from 9am PT July 27th to 5pm PT August 25th, 2023.

What is covered?



- 75% of Eligible Costs (see Section 5 of the Transit and Drayage Implementation Manual Addendum)
- Project Cap varies depending on fuel type and equity criteria.

Who can apply?

- CARB Innovative Clean Transit (ICT) compliant transit agencies
- A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization Serving Tribal entities.



See Drayage and Transit Implementation Manual Addendum for full details (www.Energiize.org/resources) under Project Resources dropdown or click [here](#).



I need more help!

- For questions, please contact infrastructure@CALSTART.org.

Drayage Fleet Set-Aside Funding Lane

The Drayage Fleet Set-Aside funding lane pairs HVIP vehicle funding with EnergiIZE infrastructure funding. Applications are scored on criteria demonstrating infrastructure utilization, cost effectiveness, and community benefit.



When can I apply?

- Funding window open from 9am PT July 27th to 5pm PT August 25th, 2023.



What is covered?

- 75% of Eligible Costs including soft costs Incurred (see Section 5 of the Transit and Drayage Implementation Manual Addendum
- Project Cap varies depending on fuel type and equity criteria

Who can apply?

- Drayage fleets that have submitted HVIP voucher request on or after March 30, 2022
- Fleets included in the HVIP eligibility list



See Drayage and Transit Implementation Manual Addendum for full details (www.Energiize.org/resources) under Project Resources dropdown or click [here](#).



I need more help!

- For questions or to request technical assistance, please contact infrastructure@CALSTART.org.

Overview of Drayage Fleet and Transit Incentive Structure

Basic Incentive Structure

	EV	Hydrogen Fueling	Mixed Fuel
Maximum Incentive Offering	75 percent of Adjusted Project Costs Incurred*		
Maximum Project Cap	\$500,000	\$2,000,000	\$1,000,000

Incentive Structure If Meeting Equity Criteria

	EV	Hydrogen Fueling	Mixed Fuel
Maximum Incentive Offering If Meeting Equity Criteria*	90 percent of Adjusted Project Costs Incurred*		
Maximum Project Cap If Meeting Equity Criteria**	\$750,000	\$2,800,000	\$1,400,000

Equity criteria are specified in IM Drayage and Transit Addendum Section 5

*Adjusted Project Costs are total project costs adjusted for eligible project expenses and project caps. For example, total project costs minus any non-EnerGIZE reimbursable expenses.



Step 1: Drayage Fleet and Transit Set-Aside Application

Drayage Fleet and Transit Set-Aside Funding Lane

Drayage Fleet and Transit Set-Aside Application Checklist



- 1 Online EnerglIZE Application for Drayage Fleet and Transit Set-Aside (Incentive Processing Center, IPC)
- 2 Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation such as Letter of Intent (see Implementation Manual Addendum Section 8)
- 3 Preliminary Site Plan
- 4 Acknowledge Sample EnerglIZE Terms and Conditions
- 5 Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.

Drayage Fleet and Transit Set-Aside Application Checklist (Continued)



- 6 Proof of Meeting Equity Criteria (if applicable)
- 7 **(For Hydrogen and Mixed Use applicants only)**
Completion of Appendix B, Critical Milestone 1:
Proof of site control
- 8 Answers to qualitative questions

Reminder: Application Eligibility

- One site per application and one application per participant (participants tracked by recipient Tax ID Number, or TIN).
- Repeat Applicants: Participants previously awarded EnerGIIZE funding in any lane must show proof of Site Commissioning to be eligible for another award.
- Recipient: Incurred Costs must match the Recipient TIN on invoiced eligible costs.
- Applicant must be in good standing with the California Secretary of State (if required to register).

Step 1: Submit Application

Infrastructure Processing Center (IPC)

What's on the IPC?

- Application Form - Fields to indicate type of fleet
- Site Equipment Manifest
- All subsequent documents listed will be uploaded to the IPC

What You Need to Complete It:

- ✓ Contact Phone and Email of Recipient, Primary Application Contact, and Job Site Contact
- ✓ Address of Infrastructure Project
- ✓ Make, Size (kg), and Anticipated Quantity of Eligible Equipment Nozzles to be Installed

Step 1: Submit Application

Proof of Cost Share – Online Form and Supporting Documents

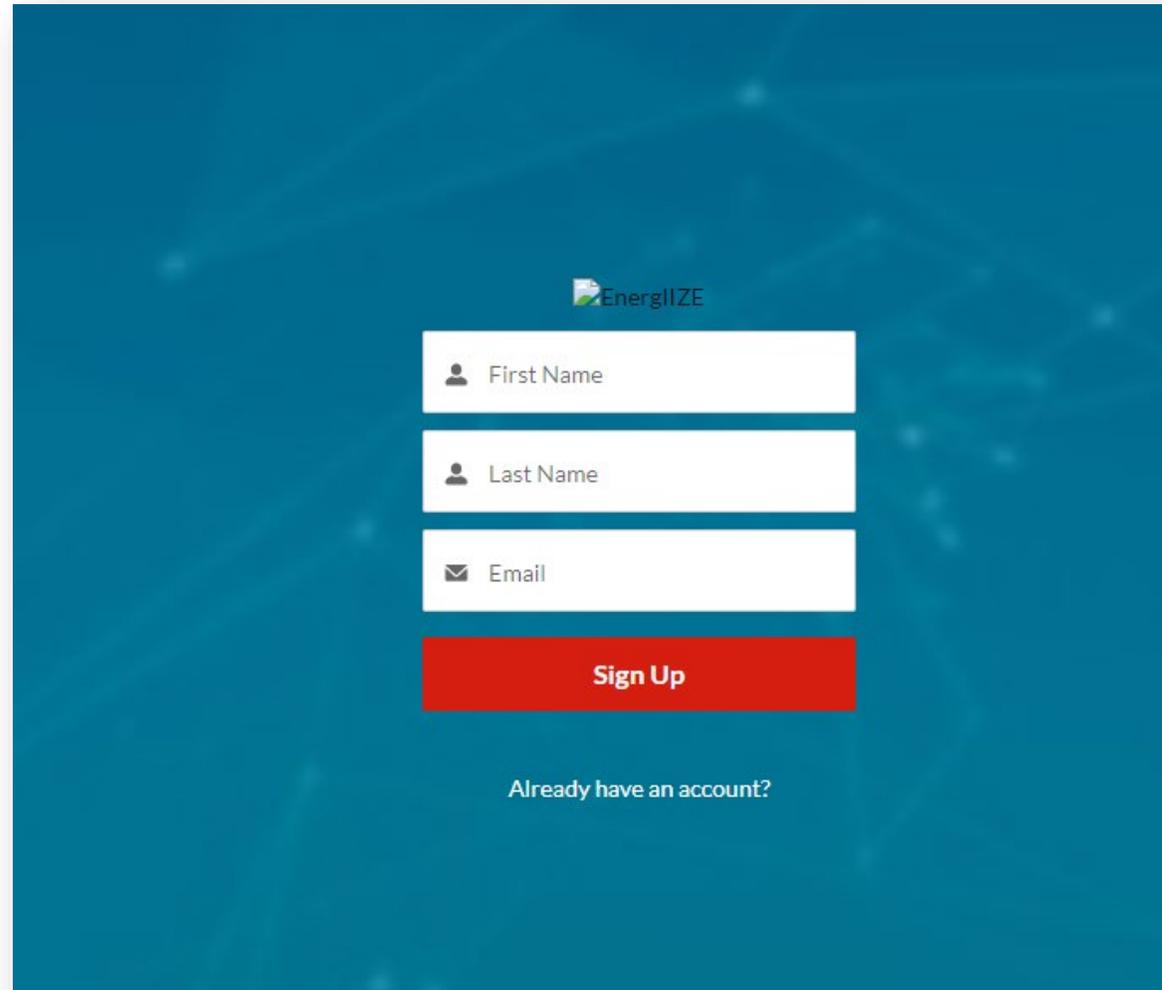
What Information Needs to be Provided?

- 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!**

Create Incentive Processing Center User Account



The screenshot shows a user registration form on a blue background. At the top center is the EnergIIZE logo. Below it are three white input fields: 'First Name', 'Last Name', and 'Email', each with a small icon to its left. A red 'Sign Up' button is positioned below the fields. At the bottom of the form area, the text 'Already have an account?' is displayed.

Sandbox: Welcome to EnergIIZE Incentive Processing Center - Message (Plain Text)

File Message Help

Ignore Delete Archive Reply Reply All Forward Meeting IM More

Junk Delete

Share to Teams

Quick Steps: Mavenlink Billing → To Manager, Team Email ✓ Done, Reply & Delete ⚡ Create New

Move Rules Actions

Assign Policy Mark Unread Categorize Follow Up

Find Related Select

Read Aloud Immersive Reader Translate Language Zoom

Send to OneNote Reply Meeting

Sandbox: Welcome to EnergIIZE Incentive Processing Center

EnergIIZE Application Portal <infrastructure@calstart.org> (EnergIIZE Application Portal via ar42cukfyhv.7z-xrmpea4.usa2s.bnc.sandbox.salesforce.com)
To Tesi Bravo

We could not verify the identity of the sender. Click here to learn more.
The actual sender of this message is different than the normal sender. Click here to learn more.

Start your reply all with: Thank you! Thank you so much! I accept! Feedback

Hi Tesi,

Welcome to EnergIIZE Incentive Processing Center! To get started with the IPC, go to https://calstart3--demo.sandbox.my.site.com/apply/login?c=ECKEPOWCFn3NWyv_lynAYGHf7l.ju2DsBd539ZvIOUJ7CMpMgM02Dy0.TG5wwaw2T32mkqAB83d_LH_NaCt2Sm7RRSVYUXhp59hCjS3tWaEbjqFmuj60KqV8daAtv7E86U6ZuAP_xtLFQjEKE9VIT6il8KI1KKfhPyeqpR1HpeecKoRSbm8tk0Cr77yHuKGLAO7RXVQ5

Username: tbravo@calstart.org

Thanks,
EnergIIZE Team

Incentive Processing Center Screenshot

Incentive Processing Center Screenshot

Search...

Home Applications (Step 1) Projects (Steps 2-6)

Welcome to EnergIIZE Incentive Processing Center!

1. Login to the Incentive Processing Center using the "Login" button in the top-right corner.
2. If you do not have a user created in the system, select the "Create a User" link at the bottom-right of the Login page.
3. Click the "Submit EnergIIZE Application Materials" to start your EnergIIZE application.

[Start Hydrogen 2023 Application](#)

Please note starting February 3, 2023, there is a sandbox Incentive Processing Center portal (<https://calstart3--demo.sandbox.my.site.com/apply/s/>) where potential EnergIIZE Commercial Vehicles project EV Fast Track lane applicants may create an account and familiarize themselves with the application portal in a test environment. Applicants will not be using the sandbox IPC to submit EV Fast Track online applications.

Application
App-000182

Status: Pending Submittal Total Project Cost: \$750,000.00

Instructions **H2 Readiness Questions** Basic Details Recipient Project Partner Project Site

- Does the project site have any open AHJ violations? Found using link in help text. ⓘ
- Is the recipient TIN required to register with the State of California (SOS)? ⓘ
- Is the recipient TIN in good standing with the State of California?
- Does the project require CEQA Analysis?
- Is the project zoned to accept H2 Fueling?
- Does the project plan meet all relevant regulatory code?
- Has the project hired a Fire Protection Engineer?

Demonstrative purposes only



Step 1.2 Site Verification Form



Drayage Fleet and Transit Set-Aside Funding Lane

Step 1: Submit Application

Site Verification Form

What's Inside the Document?

- Fields for EnerglIZE applicant
- Fields for Property Owner

What You Need to Complete It:

- ✓ 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 EnerglIZE applicant.
- ✓ If applicant owns the property:
 - ✓ Provide evidence of this (e.g. Deed).
- ✓ Note: If new or upgraded equipment is provided by the utility, then proof of easement may be required.

Site Verification Form

<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 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 <u>Click or tap here to enter text.</u> ("Owner"), hereby represents and warrants to EnergIIZE Staff (i) that Owner is the property Owner located at <u>Click or tap here to enter text.</u> ("Property") where infrastructure will be installed; (ii) that Owner has consented to Applicant's installation of certain EV charging station equipment and/or hydrogen fuel cell refueling equipment at the property; and (iii) that the undersigned has been duly authorized to execute and submit this Site Verification Form to EnergIIZE Staff. Owner acknowledges and agrees that EnergIIZE Staff is relying on Owner's foregoing certifications in reviewing and approving of Applicant's application.	
Installation Site Address:	Enter Address
City: Enter City State: Enter State Zip Code:Enter Zip Code	
Signature of Property Owner or Representative of Property Owner:	
Print Name: Print Name	Title: Click or tap here to enter text.
Date:	Click or tap to enter a date.



Step 1.3 Preliminary Site Plans



Drayage Fleet and Transit Set-Aside Funding Lane

Step 1: Submit Application

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:

- ✓ Preliminary site plan

1 FULL SITE PLAN

Scale: 1/8" = 1'-0"



P STREET

ADA NOTES:

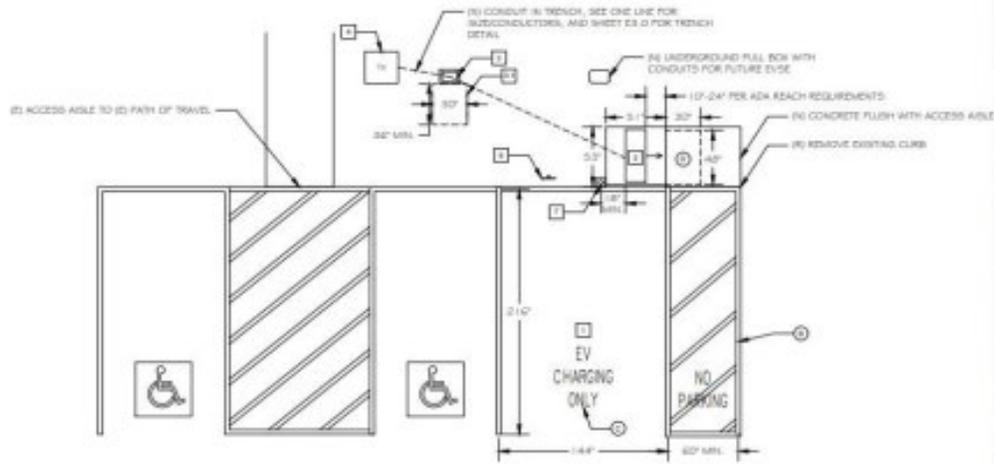
- A. INSTALLATION COMPLIES WITH THE 2011 CALIFORNIA BUILDING CODE (CBC) ACCESSIBILITY REQUIREMENTS, PARTICULARLY CHAPTER 11B SECTIONS 228.2 AND 8-1.2.
- B. PROVIDE NEW ADA ACCESSIBLE, THE WORDS "NO PARKING" TO BE PAINTED ON THE SURFACE WITHIN THE ACCESS AISLE IN CONTRASTING LETTERS 1 1/2" IN HEIGHT, STRIPES TO BE PAINTED IN WHITE 4" THICK AND A MAXIMUM OF 3/8" O.C., PER CBC 11B-812.7.2. VEHICLE SPACES AND ACCESS AISLES SERVING THEM SHALL COMPLY WITH SECTION 11B-303. ACCESS AISLES SHALL BE AT THE SAME LEVEL AS THE VEHICLE SPACE THEY SERVE. CHANGES IN LEVEL, SLOPES EXCEEDING 1:48, AND DETECTABLE WARNINGS SHALL NOT BE PERMITTED IN VEHICLE SPACES AND ACCESS AISLES, PER 11B-812.3.
- C. "EV CHARGING ONLY" LETTERING ON PARKING SPACES TO BE PAINTED IN WHITE 1/2 INCHES IN HEIGHT.
- D. 30" X 48" MINIMUM CLEAR GROUND SPACE, PER CBC 11B-305.3.
- E. PER CBC 11B-812.3.4, VEHICLE SPACES AND ACCESS AISLES SHALL BE DESIGNED SO THAT PERSONS USING THEM ARE NOT REQUIRED TO TRAVEL BEHIND VEHICLE SPACES OR PARKING SPACES OTHER THAN THE VEHICLE SPACE IN WHICH THEIR VEHICLE HAS BEEN LEFT TO CHARGE.
- F. PER CBC 11B-309.4, GAS PUMP NOZZLES AND ELECTRIC VEHICLE CONNECTORS SHALL NOT BE REQUIRED TO PROVIDE OPERABLE PARTS THAT HAVE AN ACTUATING FORCE OF 5 POUNDS (22.2 N) MAXIMUM. REACH RANGES SHALL COMPLY WITH FORWARD REACH AND SIDE REACH REQUIREMENTS, PER 11B-308.
- G. WHERE EV SPACES AND ACCESS AISLES ARE MARKED WITH LINES, MEASUREMENTS SHALL BE MADE FROM THE CENTERLINE OF THE MARKINGS, PER CBC 11B-812.1.
- H. VEHICLE SPACES, ACCESS AISLES SERVING THEM, AND VEHICULAR ROUTES SERVING THEM SHALL PROVIDE A VERTICAL CLEARANCE OF 86 INCHES MINIMUM. WHERE PROVIDED, OVERHEAD CABLE MANAGEMENT SYSTEMS SHALL NOT OBSTRUCT REQUIRED VERTICAL CLEARANCE, CBC 11B-812.4.

INSTALLATION NOTES:

- 1. CONVERT TWO EXISTING PARKING SPACES TO NEW VAN ACCESSIBLE EVCS SPACE, COMPLETE WITH ACCESS AISLE AND SIGNAGE, REFER TO DETAIL 1 FOR DIMENSIONS. REFER TO 2011 CALIFORNIA BUILDING CODE (CBC) CHAPTER 11B SECTIONS 228.3 AND 8-1.2 FOR ACCESSIBILITY REQUIREMENTS.
- 2. (R) CHARGEPOINT EXPRESS 250 DC FAST CHARGING STATION (CP250C-625-0031-CHS) ON (R) 5'-11" X 5'-11" CONCRETE PAD, 2" MIN. ABOVE TOP OF GRADE.
- 3. (R) POWER PEDESTAL ON (R) CONCRETE PAD. SEE PAD DETAIL ON SHEET ES.0 AND SPECIFICATIONS ON SHEET SA.0.
- 3.1. POWER PEDESTAL WORKING CLEARANCE OF 36" MINIMUM REQUIRED IN FRONT, PER NEC 110.26.
- 4. (R) PSAC TRANSFORMER, INSTALLED BY OTHERS.
- 5. CONTRACTOR TO PROVIDE TRENCHING OR DIRECTIONAL BORING AS APPROPRIATE FOR NEW UNDERGROUND CONDUITS TO POWER PEDESTAL. CONTRACTOR TO FIELD ROUTE ON SITE, PATH SHOWING ON DRAWING FOR DEMONSTRATION OF CONCEPT. CONTRACTOR SHALL PERFORM UTILITY LOCATE SERVICE PRIOR TO COMMENCEMENT OF WORK. CALL 811 BEFORE DIGGING.
- 6. PROVIDE POLE ISOLATED BY AND VAN ACCESSIBLE SIGNAGE, REFER TO SHEET ES.0 FOR SIGNAGE REQUIREMENTS.
- 7. (R) 4" ID NYLON BOLLARD IN CONCRETE FOR MECHANICAL PROTECTION.

2 NEW EV PARKING SPACE LAYOUT

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



REVISION	BY
1	INITIAL RELEASE
2	CITY CORRECT SIGN

PHIL HAUPT ELECTRIC
 LICENSE # 10526
 1624 HERRING BLVD
 SUITE 2-100
 ROSAMOND, CA 91070

THIS IS A PRELIMINARY PROJECT AND THE WORK SHOWN ON THESE PLANS HAS BEEN OBTAINED AND WILL BE REVIEWED BY PHIL HAUPT ELECTRIC AND RESPECTABLE CIVIL ENGINE & ARCHITECT AND PROFESSIONAL SEAL NO. 10526.

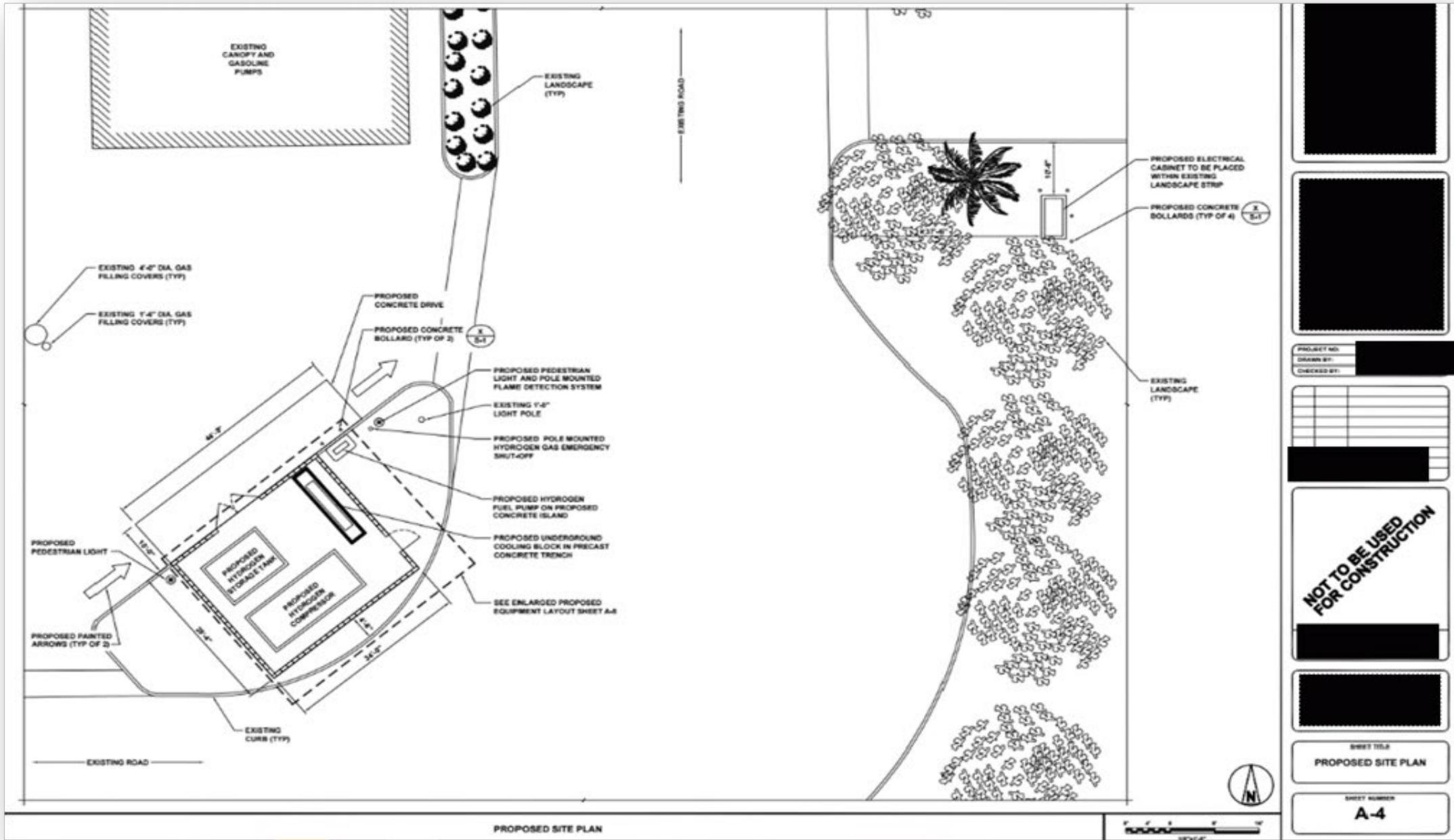


ELECTRIC VEHICLE CHARGING STATION INSTALLATION
 CITY OF ALBUQUERQUE
 MAGNOLIA AVE & TENNIS WAY
 ALBUQUERQUE, NM 87103

DATE	1/1/24
SCALE	AS NOTED
DRAWN BY	PH
JOB	CITY OF ALBUQUERQUE
SHEET	E2.0
TOTAL SHEETS	2 OF 2



Example Preliminary EV Site Plan



Example Preliminary H2 Site Plan



Step 1.4 Sample Energlize Terms and Conditions



Drayage Fleet and Transit Set-Aside Funding Lane

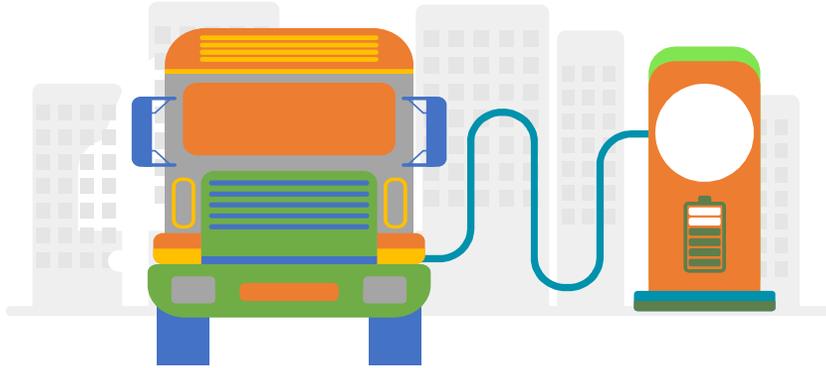
Step 1: Submit Application

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 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 withholding of future payments or repayment of incentive funds received to EnergIIZE
- Must be acknowledged by Applicant in Step 1
- EnergIIZE Agreement (including Terms and Conditions) will need to be acknowledged in Step 1 and signed in Step 2



Step 1.5 Confirmation of Request for Service



Drayage Fleet and Transit Set-Aside Funding Lane

Step 1: Submit Application

Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.

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.



Step 1.6 Additional Supporting Documents



Drayage Fleet and Transit Set-Aside Funding Lane

Hydrogen / Mixed-Use Applicants

Appendix B, Critical Milestone 1: Proof of Site Control and Possessions

Critical Milestone 1: The Applicant (for station address submitted with the application) must have control and possession of the site. This can come in the form of proof of an easement agreed to and signed by the property owner at which the hydrogen fueling station is to be constructed. Multiple types of easements may be accepted, please contact us with any questions.

The Applicant must provide to EnerGIIZE staff proof of having met this Critical Milestone by submitting adequate documentation of site control and possession. Documentation of site control and possession may include, but is not limited to, an executed lease for the land on which the station will be constructed. EnerGIIZE staff will determine whether the documentation submitted by the Applicant is sufficient to show that this Critical Milestone has been met. On a case-by-case basis, considerations can be made for accepting a letter of intent in lieu of a signed lease.

Transit Equity Criteria (If Applicable)

ICT Compliant and serving a DAC or LIC

Tribal Status

- An Innovative Clean Transit (ICT) Program compliant Public Transit System serving a designated Disadvantaged Community (DAC) or Low-Income Community (LIC) and able to provide documentation of one of the following:
 - Address of the infrastructure to be built using EnergIIZE funds is located within a DAC or LIC census tract.
 - At least 50 percent of applicable routes or coverage areas are within DACs and/or LICs.
- A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities and able to provide documentation of one of the following:
 - If the Applicant is a Federally Recognized Tribal Government listed under the list of Indian Entities Recognized by and Eligible to Receive Services from the United States Bureau of Indian Affairs, no documentation is required.
 - If the Applicant is not a Federally Recognized Tribal Government, the Applicant's 501(c)(3) Determination Letter from the Internal Revenue Service (IRS).

Drayage Equity Criteria (If Applicable)

Small Business Status

- **A small business as recognized by the California State Legislative Code, Section 14837(d)** meaning annual revenue less than \$15 million per year. Able to provide 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.

Minority Business Status

- **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**. Able to provide one of the following:

Drayage Equity Criteria (If Applicable), Continued

Tribal Status

- A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities and able to provide documentation of one of the following:
 - If the Applicant is a Federally Recognized Tribal Government listed under the list of Indian Entities Recognized by and Eligible to Receive Services from the United States Bureau of Indian Affairs, no documentation is required.
 - If the Applicant is not a Federally Recognized Tribal Government, the Applicant's 501(c)(3) Determination Letter from the Internal Revenue Service (IRS).

Infrastructure Located In a DAC or LIC

- The site where the infrastructure for the intended HVIP voucher vehicle will be located is within a designated Disadvantaged Community (DAC) or Low-Income Community (LIC) and able to provide documentation of the following:
 - Address of the infrastructure to be built using EnergIIZE funds that is located within a DAC or LIC census tract.

Responses to Qualitative Questions from Rubric

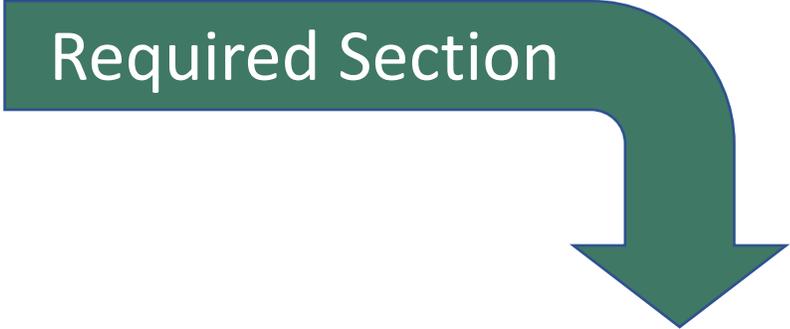
What's Inside the Document?

- Scoring criteria for application submittal.
- Three qualitative questions regarding:
 - Infrastructure utilization
 - Community support
 - Community benefits
- Scoring criteria for EV, Hydrogen, and Mixed-Use projects.

What You Need to Complete It:

- ✓ Answers to the qualitative questions listed in the rubric.
- ✓ Submission and display of all required application documents

Rubric Screenshot



Required Section

Drayage Fleet and Transit Set-Aside Rubric and Qualitative Questions

For the Energize Commercial Vehicles (Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles) project's Drayage Fleet and Transit Set-Aside funding lanes, Applicants will be evaluated on items 1-6 below. Please monitor www.Energize.org for opening and closing dates of funding window.

All **Hydrogen and Mixed Use** Applicants will be evaluated on items 7-9 as well. Applicants not requesting mixed use or hydrogen funding will not be evaluated on items 7-9.

All qualitative question responses 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. Funding will be awarded to Projects in ranked order until all available funds are exhausted. Conditional awards may be offered that are less than the requested amount. Tie scores will be broken as needed by random lottery.

Criteria	Total Possible Points
<p>1. Submission of all required application documents required in Step 1.</p> <ul style="list-style-type: none"> • For All Energize Drayage Fleet and Transit Set-Aside Applicants: <ul style="list-style-type: none"> ○ Energize Application Form ○ Proof of cost share ○ Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation ○ Acknowledge Sample Energize Terms and Conditions ○ Answers to qualitative questions ○ Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that Applicant is coordinating with utility. • For Hydrogen and Mixed Use: Proof of completion of Critical Milestone 1 	50

For all projects:

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 describe what measures/project elements are you incorporating to ensure effective and efficient management of the charging equipment? (500-word limit)

Successful responses may include:

- Explanation of the project's plan to maintain high infrastructure uptime (ex.: 24/7 service call center, preventative maintenance plans, remote monitoring systems).
- If applicable, project's plan to maximize infrastructure utilization over time (ex.: public access, business to business, shared access, CaaS).

Example - Qualitative Question #1

Rubric Screenshot

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

Primary Components	Criteria	Max Score
Description of how vehicle quantity, class and vocation match the proposed infrastructure site.	<ul style="list-style-type: none">• 10 - Description provides a well-defined, clear and reasonable explanation for how vehicles to be served and proposed infrastructure match.• 7 - Description provides a good explanation for how vehicles to be served and proposed infrastructure match.• 5 - Description provides a limited explanation for how vehicles to be served and proposed infrastructure match.• 3 - Description provides a vague explanation for how vehicles to be served and proposed infrastructure match.• 0 – No response.	10

Rubric Screenshot

<p>Description of how infrastructure use will be maximized over time, including maintenance, remote monitoring, and service plans to avoid broken infrastructure.</p>	<ul style="list-style-type: none">• 10 points<ul style="list-style-type: none">○ Project has well defined maintenance plan and provides specifics on how the project will maintain 97% uptime. AND○ Lists measurements that will be used to track operational success, including viable information on extended product warranties, engagement with certified EVITP technicians. AND○ Carefully details how utilization of the site will be maintained over time, with plans that address maintaining the high uptime standards in case of an outage.• 7 points<ul style="list-style-type: none">○ Project has a good maintenance plan and provides information on how the project will maintain 97% uptime. AND○ Lists measurements that will be used to track operational success including information on extended product warranties, engagement with certified EVITP technicians. AND○ Describes how utilization of the site will be maintained overtime, with plans that address maintaining the high uptime standards in case of an outage.• 5 points<ul style="list-style-type: none">○ Project has a limited maintenance plan that provides some information on how the project will maintain 97% uptime. AND○ Partially lists measurements that will be used to track operational success. AND○ Might describe how utilization of the site will be maintained over time, with some plans that address maintaining high uptime standards in case of an outage.• 3 points<ul style="list-style-type: none">○ Project has a vague maintenance plan that might provide some information on how the project will maintain 97% uptime. AND○ Might provide a partial list of measurements that will be used to track operational success. AND○ Might describe how utilization of the site will be maintained over time, with weak plans that do not adequately address maintaining the high uptime standards in case of an outage.• 1 Point	10
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Rubric Screenshot

Hydrogen and Mixed Use Funding Applications – Scoring Rubric

Possible Points	Interpretation	Explanation for Points
0	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
1	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
2	Somewhat Responsive	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
3	Good	Response better than adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
4	Great	Response fully addresses the requirements being scored with a high degree of confidence in the Applicant's Response or proposed solution. No identified omission(s), flaw(s), or defect(s).
5-6	Excellent	All requirements are addressed with the highest degree of confidence in the Applicant's Response or proposed solution. The Response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.

Criteria/Qualitative Question	Points	Weight	Weighted Average
1. Submission of all required Step 1 application documents	50	0.1	5
2. Location - infrastructure located within DAC	25	0.05	1.25
3. Location - infrastructure located in a LIC	25	0.05	1.25
4. Maximizing MD/HD Infrastructure Utilization	20	0.21	4.2
5. Community Buy-in and Support	20	0.21	4.2
6. Community Benefits	20	0.21	4.2
7. Hydrogen Refueling Station Design and Performance	46	0.07	3.22
8. Project Readiness	18	0.03	0.54
9. Qualifications of the Applicant/Applicant Team	48	0.07	3.36
Total	272	1	27.22

Weight Allocations

Drayage Fleet or Transit Set-Aside Doesn't Seem Like a Good Fit?

- CALSTART has a Funding Finder Tool to help.
- <https://fundingfindertool.org>

Advanced Vehicle Technology and Infrastructure Planning Grants >

Funding Finder Tool

The Funding Finder Tool is designed to help stakeholders search and filter for Medium-and-Heavy-Duty Alternative Fuel Vehicle and infrastructure programs in the state of California. Start by filtering results by ZIP Code then filter based on the other criteria you desire. Please note that for the most accurate and up to date information about each program, you should visit the website and/or speak with the agency directly.

Search for Funds

51 of 51 programs displayed.

Organization(s):	Santa Barbara County APCD	Vehicle Types:	Infrastructure, Transit, School, Off-Road, Truck, Bus, Other Vehicle Type
Program:	Clean Air Grants (Various)	Technology:	Hydrogen, Battery Electric, Hybrid, CNG/Low Nox, Other Fuel Technology
Funding:	See website for details	Total Program Fund:	TBD Show More +
Organization(s):	California Energy Commission (CEC) and California Air Resources Board (CARB)	Vehicle Types:	Infrastructure, Other Vehicle Type
Program:	Clean Mobility Options	Technology:	Hydrogen, Battery Electric, Hybrid, CNG/Low Nox, Other Fuel Technology
Funding:	Varies	Total Program Fund:	TBD Show More +

Search filters on the left: ZIP Code, County, Technology, Vehicle Type, Infrastructure, Private / Public Fleet, Scrapage.



What Comes After Step 1?

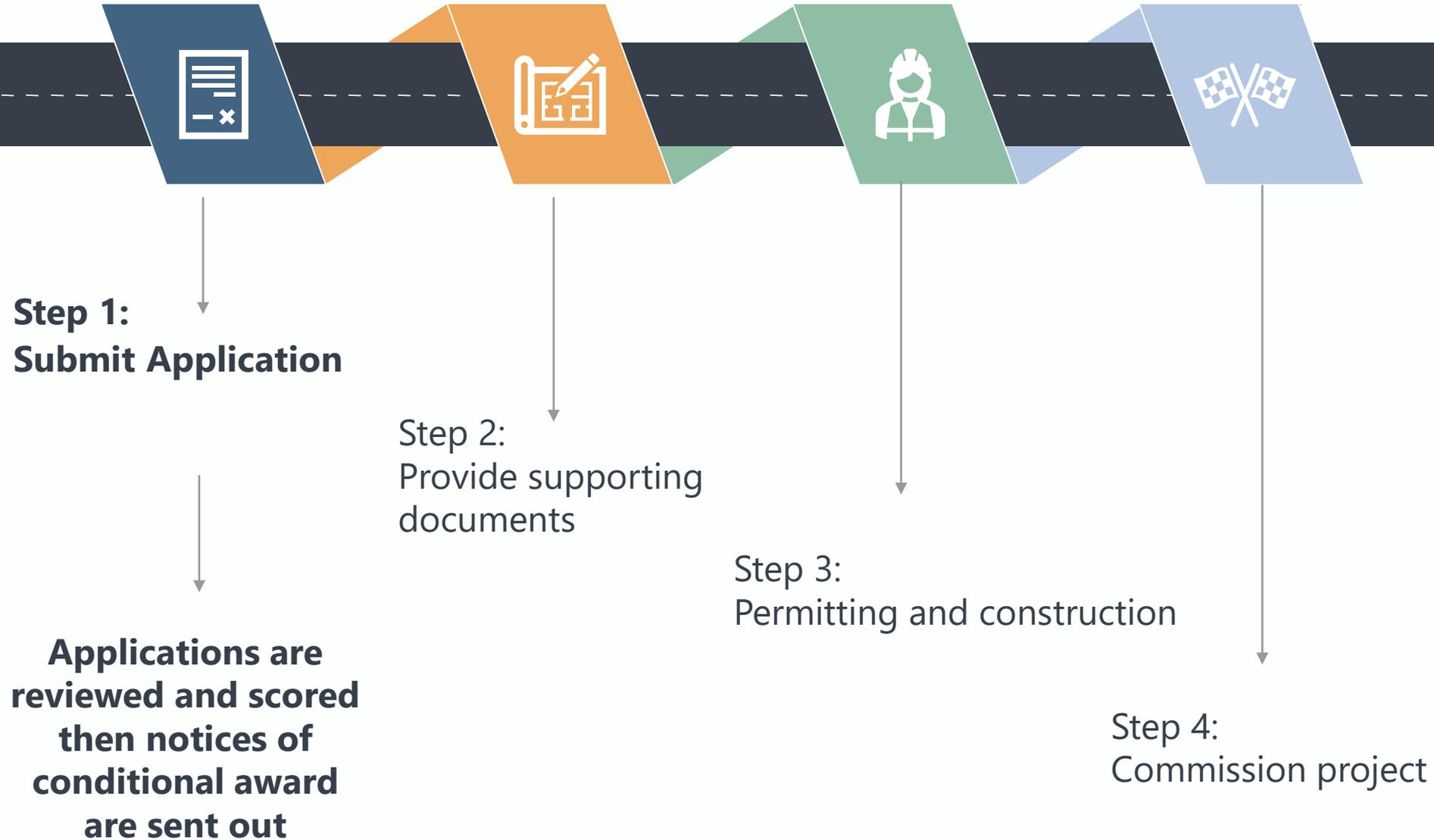
How Are Submissions Scored?

Submissions are scored and prioritized based on the criteria listed here →

Note: CALSTART reserves a 48-hour grace period after the application window closes to ask clarifying questions of applicants. Unresponsiveness during this period may result in applications being discarded.

- Submission of all required application forms.
- Location – Prioritization will be given to proposed infrastructure which will be located within a Disadvantaged Community Census tract. Proposed infrastructure to be located in a Low-Income Community Census tract will also be given priority. See [Key Terms](#) for the definitions of Disadvantaged Community and Low-Income Community.
- Tribal Projects – Prioritization will also be awarded to Tribal projects, which are defined as projects where the Applicant is a California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities.
- Benefit to the community – Applicants will be scored based on their response to three qualitative questions in the application form. EnerGIZE staff will award projects which demonstrate buy-in and support for infrastructure projects from the community, incorporate workforce development opportunities for local residents, expand transit service for local residents, and/or offer no-cost charging or fuel to local residents.

EnergIIZE Planning Ahead





Frequently Asked Questions

You Might Have These Questions

Q: *When do the Drayage Fleet and Transit Set-Aside open for applicants?*

A: Applications will be accepted beginning at 9:00 a.m. Pacific Time July 27, 2023 and will close at 5:00 p.m. Pacific Time August 25, 2023. This funding lane is competitive.

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

A: Once funding 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. If meeting equity criteria, will have 90 days to provide the information.

Q: *If I have questions before launch of the Drayage Fleet and Transit Set-Aside funding lanes, what is best way to get these questions answered?*

A: Contact infrastructure@CALSTART.org.

Contact Us



877-ENR-GIZE
877-367-4493



infrastructure@CALSTART.org



www.Energiize.org



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