

DOCKETED

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Document Title:	EnergIIZE Drayage and Transit Set-Aside Funding Lanes Application Process Slides and Recording
Description:	EnergIIZE Commercial Vehicles Project Drayage and Transit Set-Aside Funding Lanes Application Process Workshop slide deck from April 26, 2024 presentation. A recording of the workshop is viewable at the link below. https://vimeo.com/953598940/b16de34388?share=copy
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EnergiZE Workshop

Drayage and Transit Set-Aside Funding Lanes
Application Process

April 26, 2024

EnergIIZE Commercial Vehicles

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

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Agenda

1 Overview

2 Walkthrough of Drayage and Transit Set-Aside Funding Lanes 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 and Transit Set-Aside Funding
Lanes Opening April 30, 2024 at 9 AM PT

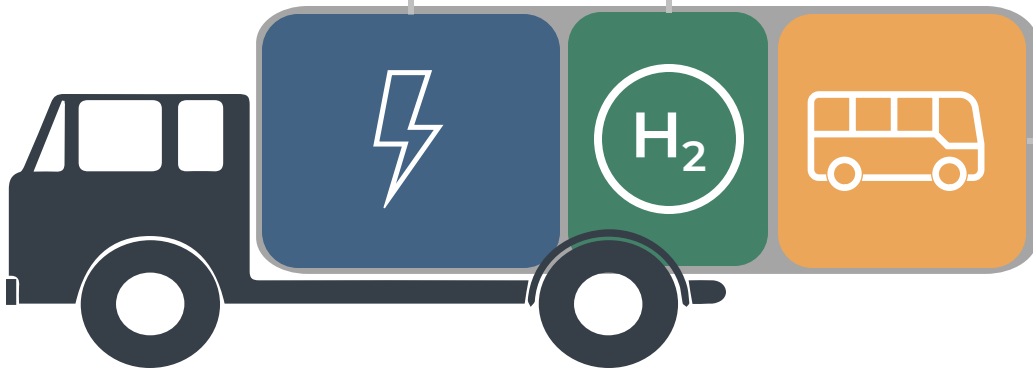
Overview of EnergIZE

Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles

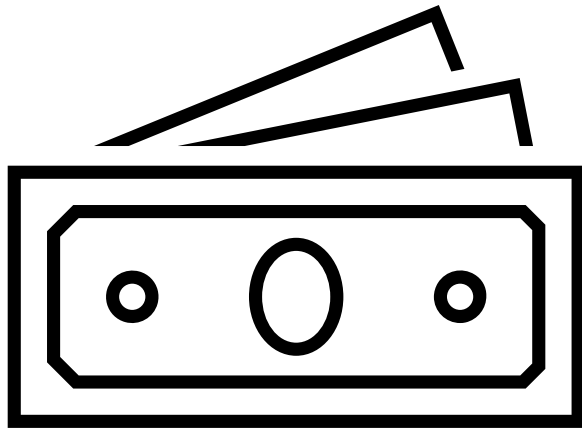
Provides \$276M in financial incentives to increase the deployment of commercial zero emission medium- and heavy-duty (MDHD) vehicle infrastructure.

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

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



Funding Set Aside For Drayage and Transit Infrastructure



- Funding has been set aside for drayage and transit infrastructure through EnerglIZE.
- Applicants may first submit infrastructure incentive application through EnerglIZE, then submit vehicle voucher request through the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP), or vice versa.

Transit Set-Aside Funding Lane

The Transit Set-Aside funding lane pairs HVIP vehicle funding with EnergiIZE infrastructure funding.

When can I apply?

- Funding window open from 9am PT April 30th to Q1 2025.



What is covered?

- 75-90% of Eligible Costs (see Drayage and Transit Application Kits)
- Project Cap varies depending on fuel type and equity criteria.
- See Drayage and Transit Application Kits for full details (www.Energiize.org/resources) under Set-Asides dropdown.



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.
- California city or county government, transportation district/transit district, or public agency



I need more help!

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



Overview of 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 Drayage and Transit Application Kits

*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.

Drayage Set-Aside Funding Lane

The Drayage Set-Aside funding lane pairs HVIP vehicle funding with EnergiIZE infrastructure funding.

When can I apply?

- Funding window open from 9am PT April 30th to Q1 2025.



What is covered?

- 75-90% of Eligible Costs including soft costs Incurred (see Drayage and Transit Application Kits)
- Project Cap varies depending on fuel type and equity criteria



Who can apply?

- Fleets or associated fleet included in the HVIP eligibility list and performing drayage operations
- Fleets or Charging-as-a-Service (CaaS) vendor installing private, public, or shared EV charging/hydrogen refueling infrastructure



See Drayage and Transit Application Kits for full details

(www.Energiize.org/resources) under Set-Asides dropdown



I need more help!

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

Overview of Drayage Incentive Structure

Basic Incentive Structure

	EV	Hydrogen Fueling	Mixed Fuel
Maximum Incentive Offering	75 percent of Adjusted Project Costs Incurred*		
Maximum Project Cap	\$750,000	\$2,800,000	\$1,400,000

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**	\$1,000,000	\$3,920,000	\$1,960,000

Incentive Structure If Installing More Nozzles

Lane Characteristics	EV	Hydrogen Fueling	Mixed Fuel
Maximum Incentive Offering If Installing More Nozzles	90 percent of Adjusted Project Costs Incurred*		
Maximum Project Cap If Installing More Nozzles	\$1,000,000 if installing 10 or more nozzles	\$3,050,000 if installing 4 or more nozzles	\$1,650,000 if installing 10 or more nozzles (combined, not per fuel type)

Equity criteria are specified in Drayage and Transit Application Kits

*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 and Transit Set-Aside Funding Lanes Application

Drayage and Transit Set-Aside Funding Lanes

Drayage and Transit Set-Aside Funding Lanes Application Checklist



- 1 Online EnerglIZE Application for Drayage and Transit Set-Aside (Incentive Processing Center, IPC), Proof of Cost Share
- 2 Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation such as Letter of Intent (see Implementation Manual Addendum Section 8.1)
- 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 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

(For CaaS Applicants only) Letter of agreement with associated fleet that infrastructure is intended to be publicly accessible or shared and to be used according to the CaaS business model

Step 1: Submit Application

Incentive 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

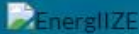
What Information Needs to be Provided?

- ☐ 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 may not be stacked with other active California Energy Commission funding programs. But you can stack with other programs!**

Create Incentive Processing Center User Account



First Name

Last Name

Email

Sign Up

[Already have an account?](#)

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

File Message Help

Ignore Delete Archive Reply Reply All Forward Meeting IM More Share to Teams

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 ar42cukfyhvx.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=EckEP0WCFn3NWYv_lynAYGHf7l.ju2DsBd539ZvIOUJ7CMpMgM02Dy0.TG5wwaw2T32mkqAB83d_LH_NaCt2Sm7RRSVYUXhp59hCjS3tWaEbqFmuj60KqV8daAtv7E86U6ZuAP_xtLFQjEKE9VIT6il8KI1KKfhPyeqR1HpeecKoRSbm8tk0Cr77yHuKGLAO7RXVQ5

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.mysite.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. **i**
No
- Is the recipient TIN required to register with the State of California (SOS)? **i**
Yes
- Is the recipient TIN in good standing with the State of California?
No
- Does the project require CEQA Analysis?
No
- Is the project zoned to accept H2 Fueling?
Yes
- Does the project plan meet all relevant regulatory code?
Yes
- Has the project hired a Fire Protection Engineer?
No



Step 1.2 Site Verification Form

Drayage and Transit Set-Aside Funding Lanes

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>EnergIIZE Applicant. Please complete as follows:</i>	
Organization Name:	
Installation Site Address:	
City:	State: 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:	Title:
Date:	

<i>PROPERTY OWNER. Please complete as follows:</i>	
Provide the name of the company, city, trust, organization or individual that owns the property where the project site will be located ("Owner").	
Property Owner Name:	
The undersigned, on behalf of ("Owner"), hereby represents and warrants to EnergIIZE staff (i) that Owner is the property Owner located at ("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.	
Signature of Property Owner or Representative of Property Owner:	
Print Name:	Title:
Date:	



Step 1.3 Preliminary Site Plans

Drayage and Transit Set-Aside Funding Lanes

Step 1: Submit Application

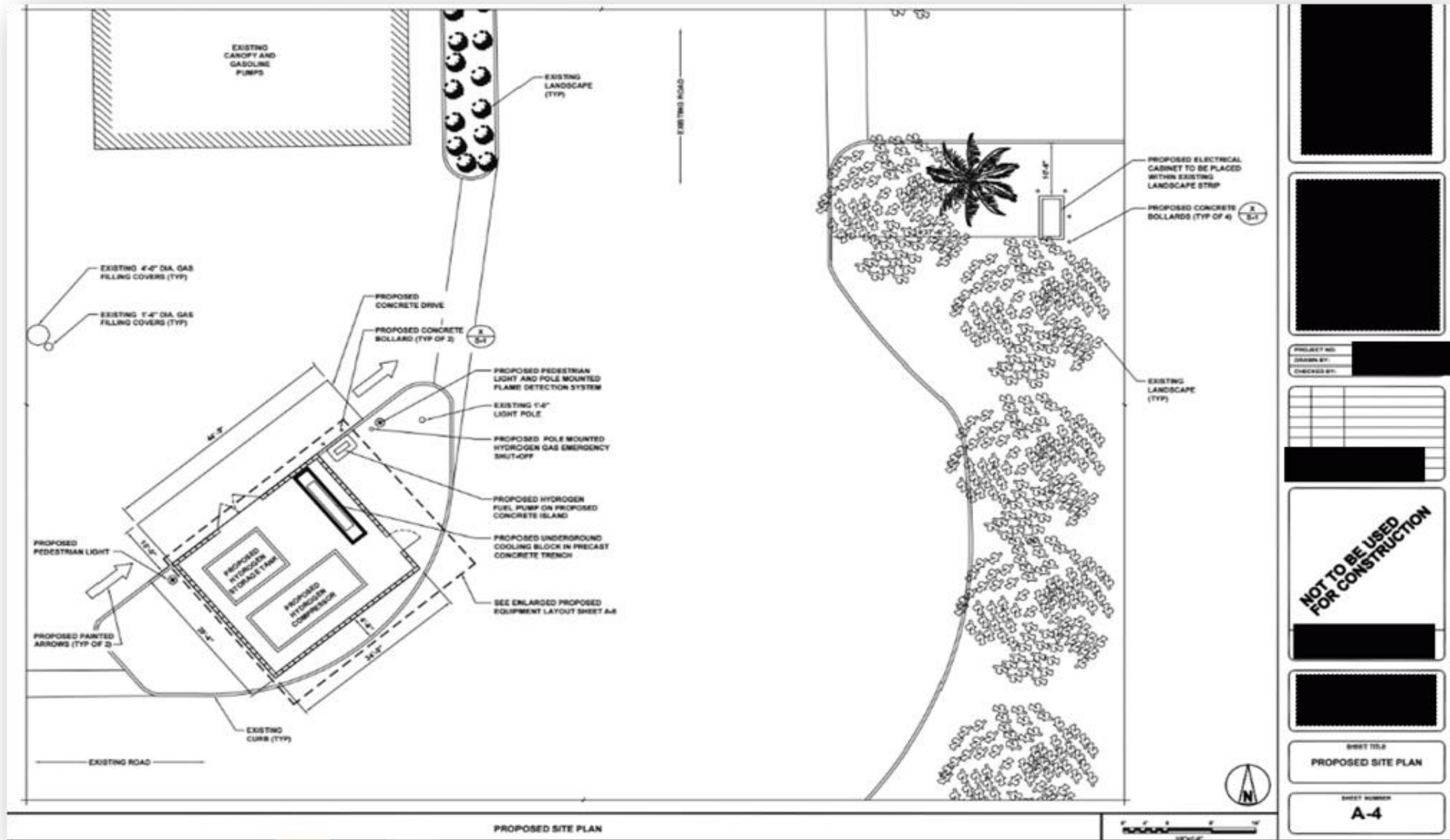
Preliminary Site Plan

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



Example Preliminary Hydrogen Site Plan



Step 1.4 Sample EnerglIZE Terms and Conditions

Drayage and Transit Set-Aside Funding Lane

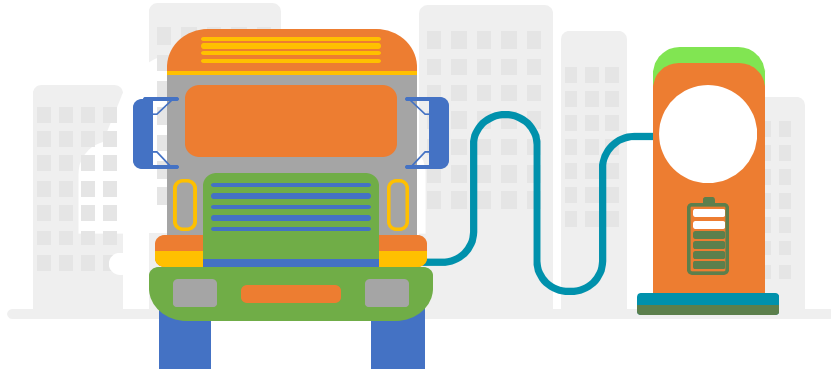
Step 1: Submit Application

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 and Transit Set-Aside Funding Lanes

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 and Transit Set-Aside Funding Lane

Transit Equity Criteria (If Applicable)

Serving a DAC or LIC

- The site where the infrastructure for the intended HVIP vehicle will be serving a designated Disadvantaged Community (DAC) or Low-Income Community (LIC) and able to provide documentation of one the following:
 - Address of the infrastructure to be built using Energize funds that is located within a DAC or LIC census tract.
 - At least 50 percent of the applicable routes or coverage areas are within DACs and/or LICs.

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).

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:
 - Documentation of 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 certification as a Disadvantaged Business Enterprise (DBE) from CALTRANS, the US Department of Transportation, or another DBE Certifying Agency. Certification must be current.

Drayage Equity Criteria (If Applicable), Continued

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 Energize funds that is located within a DAC or LIC census tract.

- 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).

Tribal Status

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.

Vehicle Commitment Agreement

Commercial Fleet Point of Contact:	
Organization/Company Name:	
Organization Type:	
Mailing Address:	
City:	
State:	
Zip Code:	
Primary E-mail:	
Phone:	
Tax ID Number:	
Infrastructure Site Address: (If diff. from mailing address above)	

MD/HD Vehicle Information (Please fill in the required information below.)

	Vehicle Model 1	Vehicle Model 2	Vehicle Model 3	Vehicle Model 4
Expected Date of HVIP Vehicle Voucher Request (MM/YYYY):				
Expected Date of Purchase (MM/YYYY):				
Make:				
Model:				

Description of vehicle and how vehicle will be used and operated:				
---	--	--	--	--

Number to be Purchased:				
Date EnergIIZE Application Submitted:				
Name of Commercial Fleet Operator/Manager:				
Signature of Commercial Fleet Operator/Vehicle Owner				
Title of Signer:				
Date:				

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

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

Select a Funding Category

Vehicles

Infrastructure

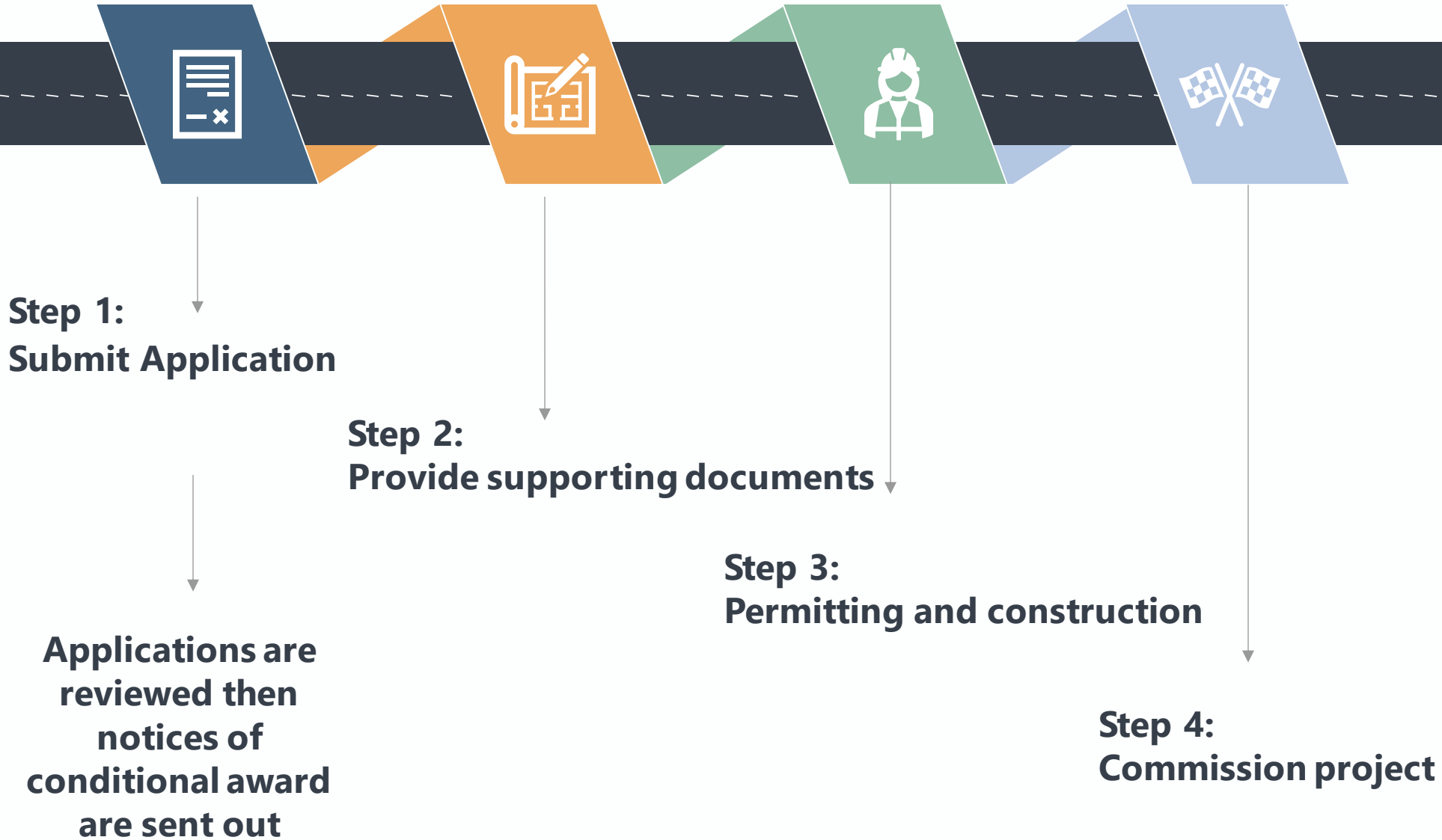
Tribal

Federal Funding



What Comes After Step 1?

EnergIIZE Planning Ahead





Frequently Asked Questions

You Might Have These Questions

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

A: Applications will be accepted beginning at 9:00 a.m. Pacific Time April 30, 2024 and will close Q1 2025. Applications will be reviewed on a monthly basis.

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 90 calendar days to provide the information in step 2.

Q: *If I have questions before launch of the Drayage 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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