DOCKETED		
Docket Number:	21-TRAN-04	
Project Title:	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)	
TN #:	261908	
Document Title:	Transit Talks Webinar - Unlock Funding Before It's Gone Slides and Recording	
Description:	CALSTART in partnership with CTA and CALACT Transit Talks - Unlock Funding Before It's Gone Webinar for vehicles (HVIP) and infrastructure (EnergIIZE) slide deck below from 2/19/2025 presentation. A recording of the workshop is viewable at the link below.  https://calact.org/wp-content/uploads/2025/02/Transit-Talks-CALSTART-Unlock-Funding-Before-Its-Gone.mp4	
Filer:	CALSTART	
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Submitter Role:	Other Interested Person	
Submission Date:	2/20/2025 3:55:31 PM	
Docketed Date:	2/20/2025	





Michael Pimentel
Executive Director
California Transit Association

Jacklyn Cuddy
Executive Director
California Association for
Coordinated Transportation





# Program

- 1. Welcome & Overview
- 2. Presentation on "Unlock Funding Before It's Gone"
- 3. Q&A
- 4. Wrap-up & Adjourn





# Speakers

## Katrina Bayer

Lead Project Manager, California Bus Transit CALSTART

#### Hannah Hamilton

Lead Project Manager CALSTART

## lan Cadger

EV Infrastructure Project Manager CALSTART

## Aiden Anthony

EnergIIZE Associate Project Manager CALSTART







# Transit Talks: Unlock Funding Before It's Gone

February 19, 2025

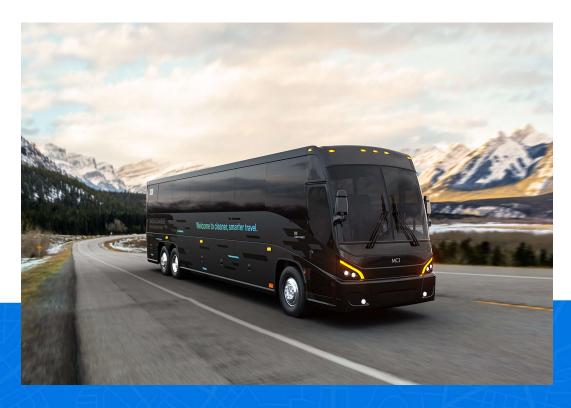
Hannah Hamilton, Ian Cadger, Aidan Anthony & Katrina Bayer

**CALSTART.org** 

# **Agenda**

- HVIP Funding
- EnergliZE
- Technical Support
- Q&A

## February 2025





## Hannah Hamilton







#### **About HVIP**

The California Air Resources Board (CARB), in partnership with CALSTART, launched the **Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP)** in 2009 to accelerate the adoption of cleaner, more-efficient trucks and buses.

Vouchers apply directly to dealers at time of purchase!

15,000+

Clean-Tech Vehicles Funded 2,400+

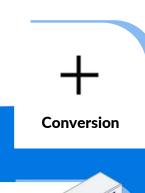
Fleets Participating

60%

In pollution-burdened communities



# **HVIP Eligible Vehicles**















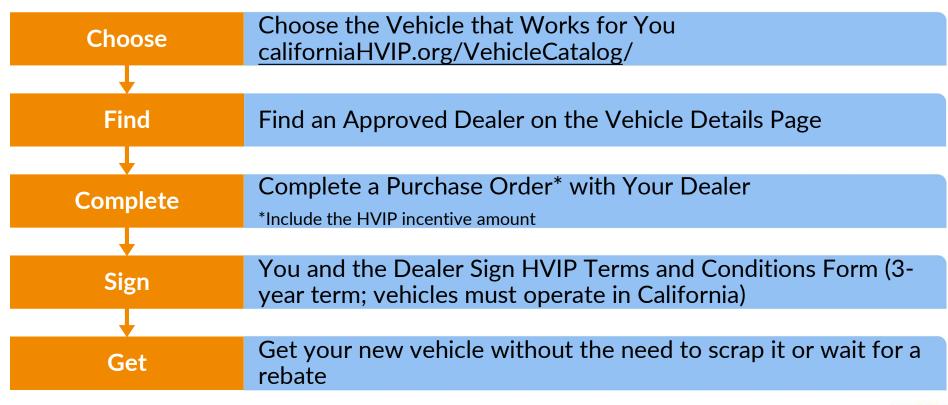




Search at California HVIP.org



## **How Purchasers Participate in Standard HVIP**





# **Currently Available HVIP Funds**

Funding Category	Total Available Funds*
Standard HVIP	Closed
Public Transit Bus Set-Aside	\$23M
Public School Bus Set-Aside	Closed
Drayage Truck Set-Aside	Closed
Innovative Small E-Fleets Set-Aside	\$31M

<sup>\*</sup>As of 2/4/2025



# **Funding Tables**

Voucher Modifiers	Amount
Public Transit Agencies	+15%
Disadvantaged Community*	+15%
Class 8 Fuel Cell	+100%

\*Only fleets with <20 vehicles are eligible for the 15% Disadvantaged Community modifier.

Public fleets with <20 vehicles are eligible for up to **five vouchers** at the **doubled** (100% increase) **base incentive amount.** 

Vehicle Weight Class	Base Incentive Amount
Class 3	\$45,000
Class 4-5	\$60,000
Class 6-7	\$85,000
Class 8	\$120,000



## **HVIP Policy Updates**

- The HVIP Public Transit Bus Set-Aside is currently open to accept new voucher requests.
  - Live updates to available funds at californiaHVIP.org/funding
- Purchase Orders for new voucher requests must be dated March 30, 2023 or later
- > Purchaser voucher cap is 50 vouchers per calendar year for transit buses
- > 100% base incentive amount increase for public fleets with 20 or fewer medium- and heavy-duty vehicles. Starting 11/22/24, the doubling is only available for a maximum of 5 vouchers (all-time total, not annually). This limit is not retroactive, meaning that small fleets with existing doubled vouchers before 11/22/24 are permitted up to 5 additional doubled vouchers.



#### **HVIP Transit Flexibilities**

Additional flexibilities for transit agencies eligible for the Transit Set-Aside. Eligibility for the Transit Set-Aside is limited to transit agencies that are subject to the ICT Regulation and CA Native American Tribal Governments that are purchasing eligible transit buses in excess of regulatory targets.

#### **Letter of Intent (LOI):**

Transit agencies may use an LOI in place of a purchase order. Purchase Order (PO) required within 6 months of submission.

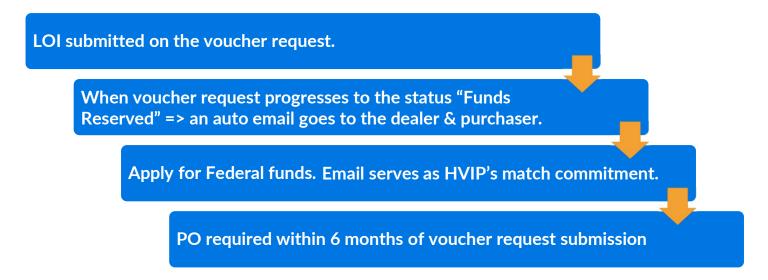
#### **15% Voucher Modifier:**

The 15% voucher modifier continues to apply to bus vouchers for transit agencies.



#### **HVIP + Federal Funds**

- HVIP is Local Match in Competitive Federal Grant Programs.
- > The Process:



CARB offers Support Letters for grant applications.

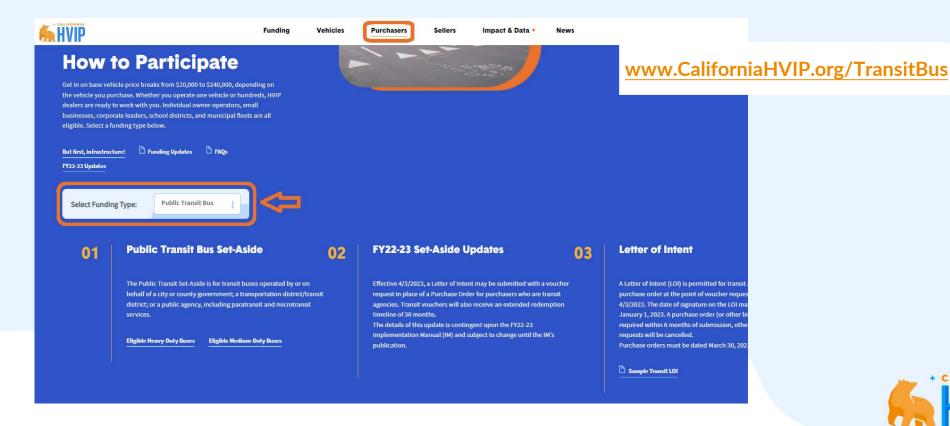


# **Transit Dealer/OEM Flexibility**

- To enable a faster redemption process for HVIP approved dealers, a Delivery Document may be submitted in lieu of a Bill of Lading and in advance of final payment.
- HVIP vouchers associated with contracts in which there is retainage are ineligible for early redemption.
- Sample documents and details available at www.CaliforniaHVIP.org/TransitBus



#### **Online Resources**





#### **Online Tools**



**Funding Finder Tool** 

Navigating MHD vehicles & infrastructure funding opportunities across CA. (fundingfindertool.org)



# Voucher Map and Data!

Follow the funds with monthly updates about how HVIP is impacting YOUR community. (californiahvip.org/impact)



Truck, School Bus, & Transit Infrastructure Planning Tools

Free resources to help deploy clean vehicles into your operations.

(californiahvip.org/purchasers)



For more information visit our website www.californiahvip.org or email us at <a href="mailto:info@californiahvip.org">info@californiahvip.org</a>

## **EXTENDED - Partial Tax Exemption for Zero-Emission Technology Transit Buses**

- The partial sales and use tax exemption for eligible purchases and leases of hybrid and zero-emission technology buses by qualified purchasers was scheduled to expire on December 31, 2023, and has been extended through <u>December 31, 2025.</u>
- Vehicles eligible for the partial sales and use tax exemption must also be HVIP eligible vehicles. The partial tax exemption applies whether or not HVIP funding was used to purchase or lease the transit bus.



# Funding ZEV Charging and Refueling Deployment for MDHD Fleets

Ian Cadger | Set-Asides Project Manager
Aidan Anthony | Set-Asides Project Manager

icadger@calstart.org aanthony@calstart.org EnergIIZE.org





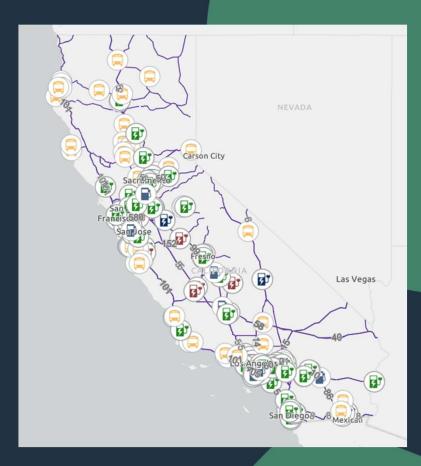




TETRA TECH

# **About Energlize**

- EnergIIZE (Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles) funded by the California Energy Commission (CEC)
- Provides reimbursement style incentives for ZEV charging/fueling infrastructure projects in support of MDHD fleets
- Over \$145M in awarded incentives
- 253 Applications Awarded in CA <u>check out our map!</u>





# **Transit Set-Aside Funding Lane**

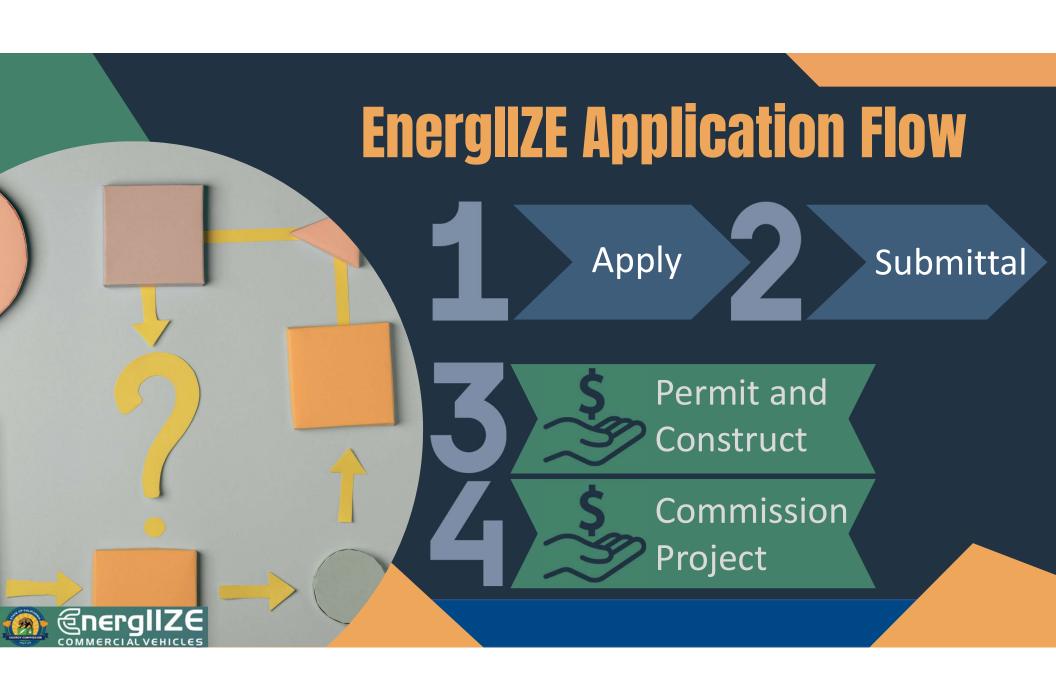
- Pairs vehicle funding like California Air Resources Board (CARB)'s Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) with EV charging/Hydrogen refueling infrastructure from CEC's EnergIIZE
- Opened Q2 2024
- Designed for applicants seeking both vehicle and infrastructure funding
  - NOTE: applicants may apply for EnergIIZE before vehicle funding



# **Transit Set-Aside Funding Lane**

- Approximately \$15M in funding available
- Infrastructure intended for:
  - CARB Innovative Clean Transit (ICT) compliant agencies
  - CA recognized Native American Tribes
  - CA City or county governments, transportation districts/ transit districts, or public agencies







# Step 1 - Apply

- EnergIIZE offers multiple funding lanes, including ones for those that do not meet Transit Set-Aside eligibility requirements.
- Select the lane that best fits the project. When the selected lane opens, applications are submitted through our EnergIIZE Incentive Processing Center (IPC).



# **Energlize After Step 1**



Once EnergIIZE applications are submitted, the Primary Contact will be notified of the application's status, which will be one of the following:

- Conditionally Awarded
- Needs Additional Information
- Not Moving Forward
- Disqualified



If the project is conditionally awarded, the application will move to STEP 2. Our EnergIIZE Application Processing Team will request document submission to help verify the project.



# **Getting Familiar**

- Incentive Processing Center Sandbox for practice applications
- Transit Set-Aside Application Kit to get started on applying for the EnergIIZE Set-Asides
  - o Located at <a href="Energize: Energize: Ener
- Reach out to <a href="mailto:infrastructure@calstart.org">infrastructure@calstart.org</a> with any questions or inquiries
- Please share feedback with us through this <u>survey!</u>



# **Contact Us**

EnergIIZE.org

infrastructure@calstart.org

1-877-ENR-GIZE

Subscribe for the latest EnergIIZE News











# Thank You





# **Technical Support For Grant Applications**

Katrina Bayer

# **CALSTART** is ready to assist

#### **Perfect Partner For:**

- ZEB Deployment
- At-Scale Deployment
- Collaborative Proposals

**30+ Years of Experience** 

From Inception to Implementation

Let Our Experience Work For You



# **Decision-Support Tools:**



- Zero-Emission Technology Inventory (ZETI)
- Total Cost of Ownership (TCO)
- Route Energy Modeling (REM)
- Infrastructure Optimization (IOT)
- Emissions Modeling: Quantify savings



# **Competitive Funding Applications**

Annual Opportunities: Federal & Local

- Low or No Emission (Low No):
  - Purchase & Lease of Zero/Low-Emission Transit Buses and Supporting Facilities
- Transit Intercity Rail Capital Program (TIRCP):
  - Fund Transformative Capital Improvements to Reduce GHG Emissions, VMT, & Congestion



## **Evaluation Criteria**

## **Typically Include:**

- Demonstration of Need & Benefits
- Planning and Local or Regional Prioritization
- Local Financial Commitment (Local Match)
- Project Implementation Strategy
- Technical, Legal, and Financial Capacity

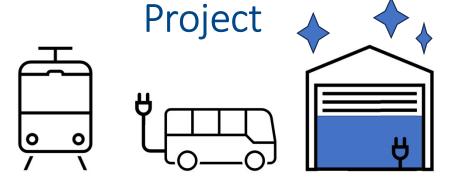
The NOFO holds the tools you need to succeed!



# **Choosing to Apply**

# Ask Yourself Before Applying:







## **Considerations for FY25**

FTA Grants are highly competitive

## Address Administration's Priorities\*:

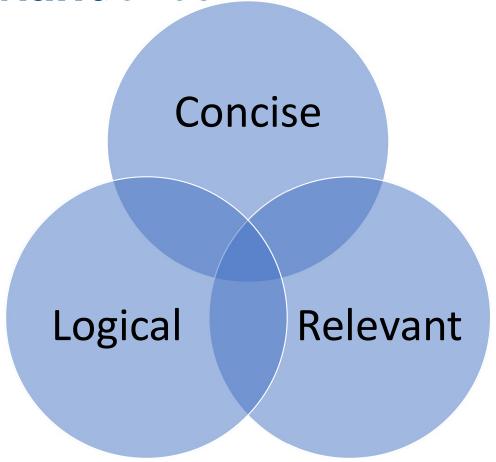
- Positive Cost-Benefit Analysis
- Family & Community Impact
- Social Cost of Carbon
- Qualified Opportunity Zones
- Strong Local Financial Commitment

Context

<sup>\*</sup> Per U.S. Department of Transportation (DOT) Secretary Sean Duffy's new order and memorandum issued on Jan. 29, 2025, outlining significant policy shifts aimed at implementing several of the Trump Administration's executive orders.



# **Powerful Narratives**





## **Avoid These Common Pitfalls**

1 Failure to Address Criteria in the NOFO

- **2 Budget Inconsistencies**
- 3 Implausible or Unsupported Project Timeline
- **Lack of Planning or Environmental Requirements**



## **Local Match = Local Commitment**





www.californiahvip.org

www.EnergIIZE.org

Innovative Clean Transit | California Air Resources Board



## **HVIP Shuttle Bus**

# **HVIP Transit Bus**





## **Thank You**

Katrina Bayer

Lead Project Manager

kbayer@calstart.org





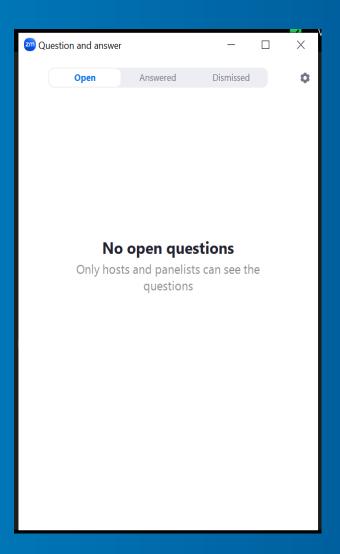


Q&A



## How to Ask Questions

 Submit your questions anytime during the program using the Questions module in your webinar control panel at the right of your screen.









Michael Pimentel
Executive Director
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