

*Comment Received From: CALSTART
Submitted On: 12/20/2022
Docket Number: 21-TRAN-04*

EnergIZE EV Jump Start Cost Reimbursement Workshop Slides and Recording

EnergIZE Commercial Vehicles Project EV Jump Start Lane Cost Reimbursement Workshop slide deck below from December 8, 2022 presentation.

A recording of the workshop is viewable at the link below.
<https://youtu.be/itezjBW07Y>

Additional submitted attachment is included below.



EnergiZE Workshop

Cost Reimbursement

EV Jump Start

December 8, 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/85160628467?pwd=ZjNUNk92bFFlem05SHM2MIBYa2pXUT09>

Webinar ID: 851 6062 8467

Passcode: 366551

Mobile:

+16699006833,,85160628467# US (San Jose)

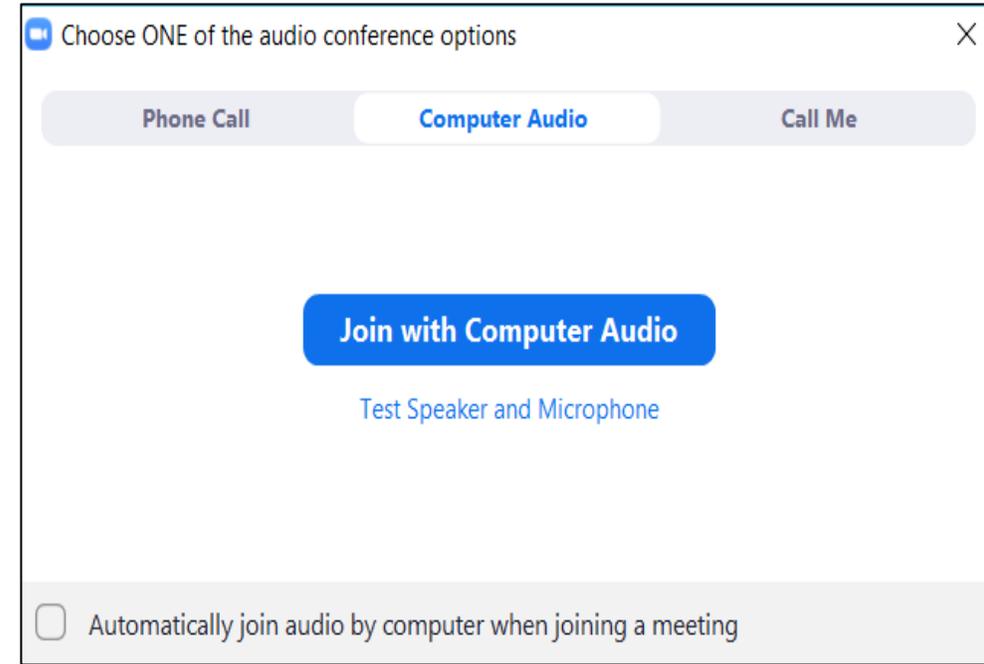
+16694449171,,85160628467# US

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 EV Jump Start Lane Overview

2

EnergIIZE Soft Costs Overview

3

Cost Definitions

4

Soft Cost Reimbursement Process

5

Q&A

Objectives

- To provide an overview of the EV Jump Start funding lane soft cost reimbursement process.
 - Note: only applicants in the EV Jump Start funding lane are eligible for incentives towards soft costs.
- To provide examples of expenses eligible for cost reimbursement.



Overview



EV Jump Start Funding Lane

EV Jump Start Funding Lane

EV Jump Start 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 was Sept - Oct 2022.

What is covered?

- 75% of Eligible Costs Incurred (see Section 6 of the [Implementation Manual](#)).
- Project cap of \$750,000 for incentive funds.



Who can apply?

- Fleets must meet equity criteria.
- See Implementation Manual for full details.

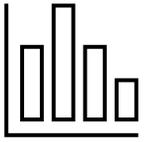


I need more help!

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



Poll Question #1



Which of the following best describes your role (select all that apply)?

- A. Approved Vendor
- B. Fleet Vehicle Operator
- C. Charging-as-a-Service Provider
- D. Site Owner
- E. Other



Requirements



EV Jump Start Funding Lane

EV Jump Start Fleet Eligibility

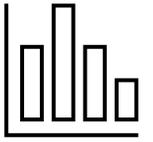
If any of the following apply to the commercial fleet, they are eligible for EV Jump Start:

- Small business as identified in the California State Legislative Code.
- Certified Minority Business Enterprise, Woman-Owned Small Business, Veteran-Owned Small Business, or LGBT-Owned Small Business.
- Transit Agency located in or operating at least 50% of fleet operation in a designated Disadvantaged Community [1].
- School district in a designated Disadvantaged Community [1] or in a designated Low-Income Community [2].
- Tribal entity.
- Non-profit organization.
- Recharging infrastructure is in a designated Disadvantaged Community [1] or a Low-Income Community [2].

[1] Defined [by CalEnviroScreen 4.0](#)

[2] Defined [by AB 1550](#)

Poll Question #2



Which of the following applies to you (select all that apply)?

- A. Small business as identified in the California State Legislative Code.
- B. Certified Minority Business Enterprise, Woman-Owned Small Business, Veteran-Owned Small Business, or LGBT-Owned Small Business.
- C. Transit Agency located in or operating at least 50% of fleet operation in a designated Disadvantaged Community [1].
- D. School district in a designated Disadvantaged Community [1] or in a designated Low-Income Community [2].
- E. Tribal entity.
- F. Non-profit organization.
- G. Recharging infrastructure is in a designated Disadvantaged Community [1] or a Low-Income community [2].
- H. Other.

[1] Defined [by CalEnviroScreen 4.0](#)

[2] Defined [by AB 1550](#)

EV Jump Start Applicant Eligibility

The individual, organization, or company who completes and submits all necessary EnergIIZE application forms and is responsible for coordinating all subsequent documentation described in the Implementation Manual (IM) for their infrastructure project must be either:

A Commercial Fleet or Vehicle Operator

OR

An Approved Vendor

- Can be a business, organization, or individual.
 - Responsible for the operation of one or more Medium- or Heavy-Duty Zero Emissions Vehicles (Class 2b and above) in the State of California and who will own and operate infrastructure to support their MD/HD vehicle(s).
 - One application associated with their Tax ID per funding wave.
- May apply on behalf of an eligible commercial fleet or vehicle operator.
 - Must be vetted by EnergIIZE staff and complete the [Approved Vendor Application](#).
 - May submit multiple applications; they may not submit multiple applications for the same fleet or the same site address.

NOTE: At time of application window, Charging as a Service (CaaS) was not eligible during EV Jump Start funding lane.

EV Jump Start Equipment Eligibility

- Equipment is eligible for EV Jump Start if:
 - It is for recharging Class 2B or larger zero-emission vehicle (GVWR of 8,501 lbs. and greater); and
 - It is on the customer side of the meter, up to the plug/nozzle of a vehicle; and
 - The equipment is new; and
 - Equipment provides either Level 2 EV Charging or DC Fast Charging; and
 - The equipment meets required standards.
- See full list of eligible equipment [on the EnerGIIZE website](#) under “Choose Your Technology”.
- [The Infrastructure Readiness Center \(IRC\)](#) also has useful information and a link to the full Implementation Manual.
- To request adding equipment to the Approved Product List, please email infrastructure@calstart.org.

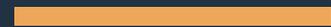
Eligible Equipment Costs



- 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

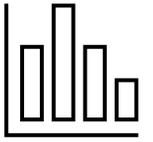


Cost Definitions



EV Jump Start Funding Lane

Poll Question #3



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

Soft Costs



- **Soft Costs** - Costs incurred prior and during the process of constructing an infrastructure site that do not directly go towards the purchase of equipment.
- Only EV Jump Start funding lane awardees are eligible for incentives towards soft costs.

Eligible Soft Costs



- Eligible if within these categories:
 - Labor costs related to construction paid at prevailing wage.
 - Architectural, design, or legal fees for infrastructure planning.
- Actual costs incurred towards either of the above categories are eligible for incentives and may not exceed the following caps:
 - \$2,500 per Level 2 plug
 - \$5,000 per DCFC plug

Cost Definitions



- **Direct costs** are allowable costs incurred that can be attributed to a specific final cost object.
 - Soft costs can be direct costs.
- **Incurred costs** are out of pocket costs that have been incurred/paid.
- **Fringe Benefits**
 - Are applied to direct labor.
 - Rate is derived by taking total salaries and wages divided by total fringe benefits.

Example Direct Costs



- Personnel costs.
- Subcontractor costs.
- Capital costs.
- Project management.
- Equipment costs.
- Network costs.

Note – These are examples, not financial advice. Please verify your expenses with your Accounting team. Examples provided here are just to illustrate the definition of a Direct Cost. Confirm with the Implementation Manual for complete list of Eligible Costs.

Example Fringe Benefits



- Paid time off
- Statutory benefits

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

Example EV Jump Start Lane Ineligible Costs



- Travel
- Meals
- Indirect Costs
- Note: Costs not listed as eligible costs are ineligible

General Unallowable Costs

- Alcoholic beverages
- Advertising
- Public Relations
- Charitable contributions
- Fines and penalties
- Lobbying

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



Soft Cost Reimbursement

EV Jump Start Funding Lane

Personnel Costs Reimbursement Process



- Submit EnerGIIZE Milestone Payment Schedule and Request Form.
- Include with Form, as applicable, documentation of cost incurred related to labor, such as salaries, wages, and fringe benefits:
 - **Third Party Labor - Invoice**
 - **Invoice** – Vendor invoice to include date of payment or other third-party documentation provided supporting the cost billed, **OR**
 - **Direct Labor – Payroll Records**
 - **Payroll records of awardee’s own employees** - prevailing wage and fringe.
 - Each staff billed must be listed individually to include the name, title, number of hours worked, and hourly rate. Labor hours billed must be supported by time records, and documentation must be submitted to verify hourly labor rates.
 - Check on applicable prevailing wage laws as well as equal benefits ordinances.

Direct Labor - Fringe Benefits

Under Personnel Costs



- Include with Form, applicable (continued):
 - **Fringe Benefits** – If submitting labor costs for reimbursement, fringe may be included and accompany payroll records. Additional documentation may be requested to verify fringe rate.

All Other Direct Costs Reimbursement Process



- Includes Subcontractor costs.
- Submit EnerGIIZE Milestone Payment Schedule and Request Form.
- Include with Form:
 - **Proof of Incurred Cost** – Vendor invoice to include date of payment or other third-party documentation provided supporting the cost billed.
 - **Direct costs must be itemized** on the invoice and supported by sufficient relevant documentation such as a vendor invoice, receipt, or other pertinent third-party provided documentation verifying amounts billed and/or reported as matching cost.
 - Any new equipment purchases or materials and miscellaneous purchases exceeding \$5,000 must be pre-approved in writing.

You Might Have These Questions

Q: *When submitting Milestone Payment (Reimbursement) request, do I need to be the one that incurred the cost?*

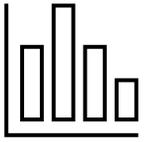
A: **Yes, this incentive is based on a reimbursement process and the recipient of award funds needs to provide documentation that they incurred the cost.**

- The Recipient is “an individual, organization, or company to whom incentives shall be dispersed. Unless otherwise noted, the recipient for EnergIIZE incentives should be the applicant. By default, the applicant is the recipient and primary point of contact for the EnergIIZE project unless stated otherwise. A Recipient may be a commercial fleet or vehicle operator applying on behalf of their organization and may therefore receive incentives for eligible costs they incur throughout the process of infrastructure completion. A Recipient may also be a vendor in charge of the completion of an infrastructure project and must therefore clearly indicate the lowered cost of incentive eligible items on invoices.”
- When the EnergIIZE EV Jump Start Lane applicant submits a Milestone Payment (Reimbursement) Request, they must provide an invoice.
- The Award Recipient must provide a W-9.



Q&A

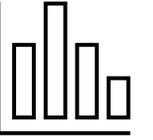
Poll Question #4



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 #5



What additional workshop topics would you like to see?

Contact Us



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