DOCKETED	
Docket Number:	22-EVI-02
Project Title:	CALSTART Communities In Charge EV Infrastructure Incentives
TN #:	249003
Document Title:	Presentation - CALSTART Comments - Communities in Charge 'How to Apply, Part 2'
Description:	Public Workshop Slides
Filer:	System
Organization:	CALSTART
Submitter Role:	Public
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Docketed Date:	2/28/2023

Comment Received From: CALSTART

Submitted On: 2/28/2023 Docket Number: 22-EVI-02

Communities in Charge 'How to Apply, Part 2' Public Workshop Slides

Additional submitted attachment is included below.



How To Apply Part 2

Preparing a Complete Application for Level 2 EV incentives

March 1, 2023

Meeting will begin at 10 AM









Introductions

Speakers

Geoffrey Cook, CALSTART

Xiomara Chavez CALSTART

Q&A Panelists

Xiomara Chavez, CALSTART

Geoffrey Cook, CALSTART

Phil Cazel, California Energy Commission (CEC)



Agenda

- Workshop Goals
- Overview
- Application Journey through the Incentive Processing Center
- Uploading Required Documents
- Awards
- Support Requests
- Additional Considerations
- Upcoming Dates
- Q&A



Workshop Goals

Communities in Charge Staff aim to address the following high-level questions:

- ☐ What documents must Applicants have, and what information must Applicants provide?
- What does the incentive processing center look like and how does it work?
- What does the application process look like and how much effort will it take per application?



Poll Question #1

How did you hear about Communities in Charge?

- A. Public Meeting
- B. Social Media
- C. CALSTART Newsletter (CALSTART Compass)
- D. CEC Docket Announcement
- E. Referred by a Community Based Organization
- F. Referred by GRID Alternatives
- G. Other



Overview



Communities in Charge Project Overview



Communities in Charge is California's market-accelerating, lightduty electric vehicle (EV) charging incentive project



Funded by the California Energy Commission's Clean Transportation Program, implemented by CALSTART, and supported in partnership with GRID Alternatives and Tetra Tech



Communities in Charge is designed to transform EV accessibility, rapidly catalyze new markets, and swiftly deploy Level 2 EV charging stations



\$30 Million available for first funding wave.



Applicant Milestones



REGISTER (Through the IPC)

APPLY (45 Day Window)

NOTICES OF AWARD (Conditional or Final)

MIDPOINT PAYMENT

FINAL PAYMENT (270 Days from Final Award)



Poll Question #2

What is your experience with applying for EV charging incentive projects?

- A. <u>Beginner</u> This is my first time applying for an incentive like this.
- B. <u>Intermediate</u> I have applied for programs like this a few times.
- C. <u>Expert</u> I have applied for programs like this often and have a lot of experience.



Poll Question #3

Do you expect to submit documentation to be considered a Community Connection?

- A. Multi-Family Housing in Charge
- B. Tribes in Charge
- C. Congregations in Charge
- D. Schools in Charge
- E. Healthcare in Charge
- F. Nonprofits in Charge
- G. Local Governments in Charge
- H. Workplaces in Charge
- I. No Community Connection.



Application Journey: Incentive Processing Center



Registration To The Incentive Processing Center (IPC)

What is the IPC?

- The IPC is an online platform where you will be able to...
 - Enter application information
 - Upload Documents
 - Check on Application Status
 - Receive messages from staff

When will the IPC open?

The IPC will open on March 23, 2023 (9 am PST)

How will I know the IPC is open?

 Our staff will notify availability via website, docket, or email list



Information Required at Application

Applicant Information

- Organization Name
- Primary Contact
- Tax ID

Project SiteInformation

- Installation Address
- Project Site Type (e.g., Multifamily housing, park and ride, etc.)

Supporting Documents

- Site Verification Form
- Preliminary / Final Site Plan
- Building Permit / Application

Equipment Information

- Make and Model
- Connector Counts

Resources





Use this resource to help gather all the information you will need for your application(s).



Email our team at communitiesincharge@calstart.org



Visit us during our office hours! Set up a time with this <u>Calendly link</u>.



Project Readiness and Funding Reservation Process

Readiness Tier	Documents Provided at Time of Application				
Tier 1	Site Verification Form + Final Site Design + Issued Building Permit				
Tier 2	Site Verification Form + Final Site Design + Building Permit Application				
Tier 3	Site Verification Form + Preliminary Site Plans				



Poll Question #4

Which Readiness Tier do you expect the majority of your applications may fall under? Select only one.

- A. Tier 1
- B. Tier 2
- C. Tier 3
- D. Not Sure



Disclaimer:

The following screenshots of the Incentive Processing Center (IPC) and updated website are provided here for <u>illustrative purposes only</u>.

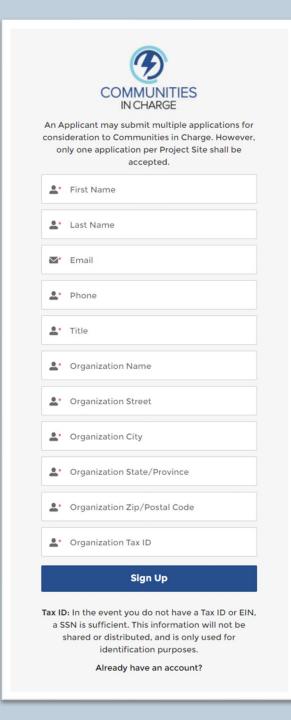
Any elements, processes, or written information contained within these screenshots <u>may be subject to change</u>.



Accessing the Incentive Processing Center from the Communities in Charge Webpage





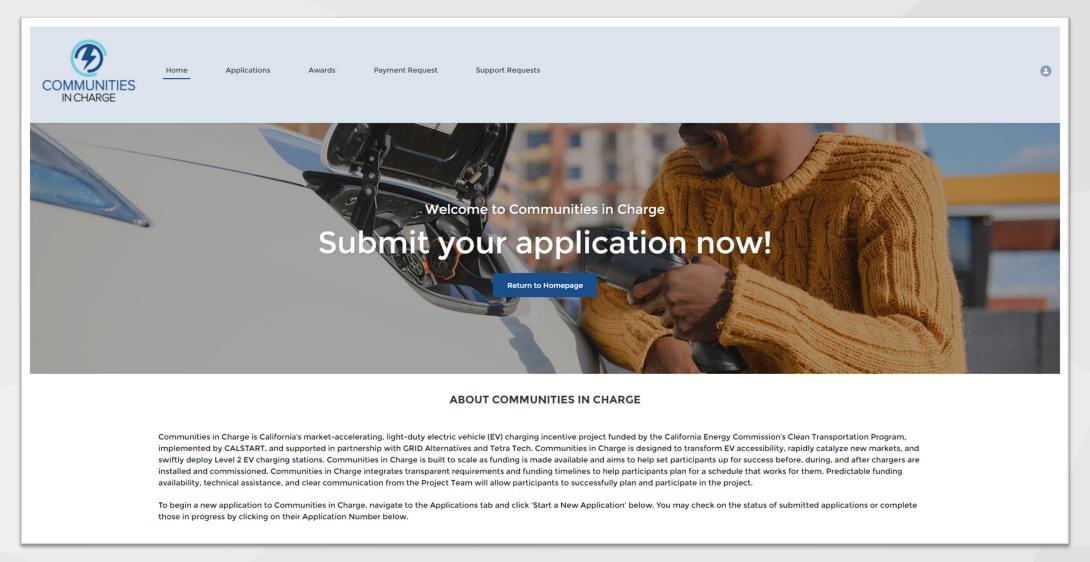


Register to the Incentive Processing Center

- Prior to applying, you must register as an Applicant.
- Your login grants access to all Applications you may submit through the IPC.
- Each Applicant should have only one login.



Welcome to the Incentive Processing Center









- Start a new application
- View all existing applications



Awards

- Applications which have received awards
- Awardees will be notified of award status via email



Payment Requests

- Submit a request for midpoint or final payment.
- Submit all documentation needed for the request.
- Track your submitted payment requests.



Support Requests

- Submit requests for support from incentive processing team.
- Submit supporting documentation.
- Request an extension.







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- View all existing applications



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Applications



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Applications

Current Application Window: NN/NN/2023 - NN/NN/2023

To create a new Application, click the 'Start New Application' button below, and subsequent screens will guide you through the process. Once you have completed all required fields and uploaded the necessary documentation, submit your application for review and scoring. Once submitted, you will not be able to make changes or upload new documents without approval from Communities in Charge Staff. All Applications must be submitted by the deadline below. Late submissions or requests for extension to this application window will not be accepted. Participation in Communities in Charge constitutes an agreement to abide by the requirements detailed in the Implementation Manual.

All Applications must be prepared to include (at a minimum):



APPLICATIONS

App-0000043 Installation Street Status

App-0000043 5645 Bad Bunny Road Testington, CA 90000 Submitted

App-0000065 Pending Submittal

App-0000065

View All

List view of all applications



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Applications



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Ready to Start an Application?



There are a few things to consider prior to starting:

- 1. Construction must not have begun at your site. Projects who have already begun construction are ineligible for incentives.
- 2. If you're unsure whether you have all the necessary materials to apply, please visit our website and consult the Application Checklist.
- 3. All of your application materials must be submitted prior to an application window closing. No extensions shall be granted.
- 4. Once you have submitted your application, no further changes can be made.

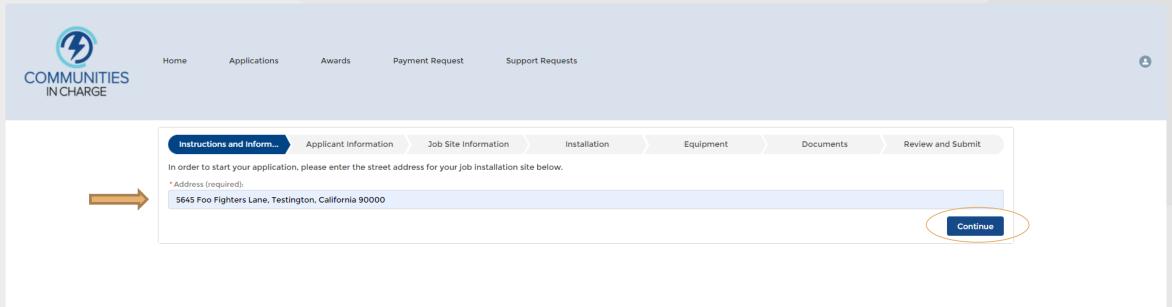
Once you're ready to begin an application, click Confirm below.

New Application

Confirm



Applications - Site Address





- Input address formatted in the same way it is recorded on official documents.
- Avoid using return to previous page button on browser, doing so will bring you back to the beginning of your Application.



Applications



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Instructions and Inform...

Applicant Information

Job Site Information

Installation

Equipment

Documents

Review and Submit

Application App-0000067 Status and Information

Congratulations for starting an application to Communities in Charge! Each application must pertain to a unique Project Site and shall be identified by the Application Number above. All fields are required for completion, unless stated otherwise. While it is recommended to be completed in one sitting, you may save and return at a later time to complete your application.

Continue



Applications - Applicant Information



ome

pplications

Payment

Support Reques

Information from registration will prepopulate here. This information will remain the same throughout all your applications.

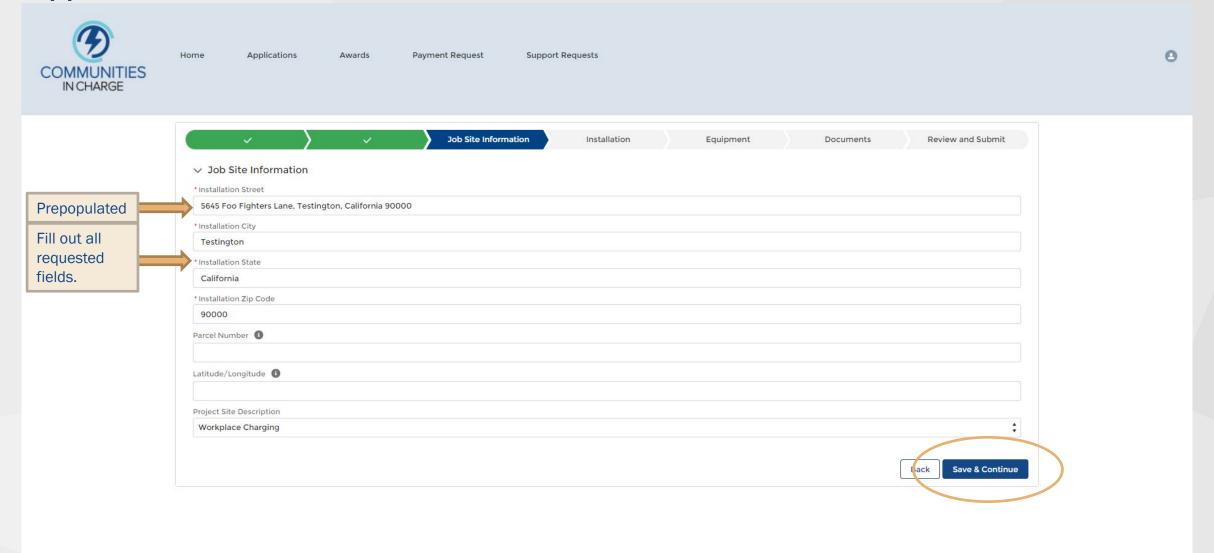
Fill out as much as possible even if not required to save time in the future.

Applicant Information	Job Site Information	Installation	Equipment	Documents	Review and Submit	
✓ Organization						
Applicant Organization Name Test Org		Organization Ta 555667777	x ID			
Organization Address 1525 Test Way Testington CA 92530		Organization Wel	bsite			
∨ Primary Contact First Name		Organization Nar	ne (If different from Applican	nt Organization)		
Xiomara Last Name		Email				
Chavez Title		xccalstartcic@g Phone	mail.com			
		3233693627				
✓ Alternate Contact Alternate Contact Name		Alternate Contac	t Organization (if different fro	om Applicant Organization)		
First Name						
First Name		Alternate Contac	t Phone			
Last Name						
Last Name		Alternate Contac	t Email			
Alternate Contact Title		you@example				
→ Authorized Signatory						
Authorized Signatory Name		Phone				
First Name						
First Name		Email				
Last Name		you@example	e.com			
Last Name						
					Back Save & Continue	



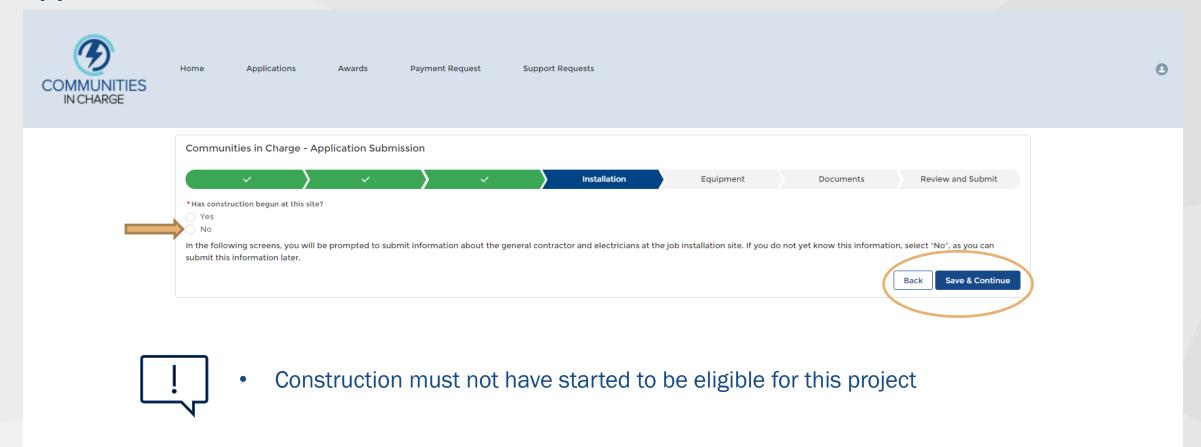
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Applications - Job Site Information



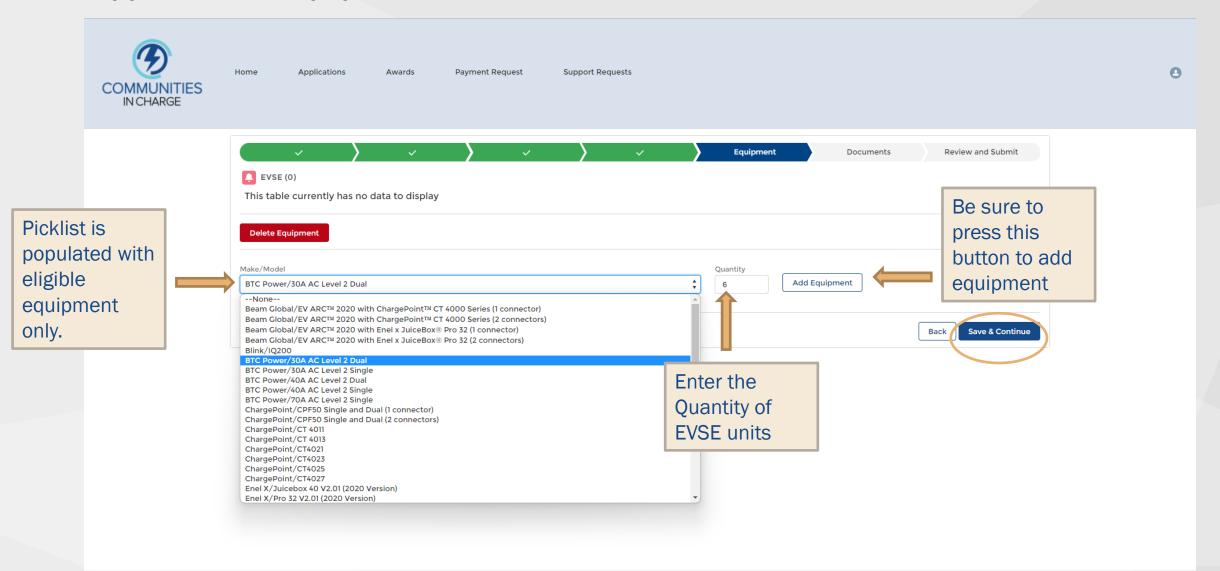


Applications - Installation





Applications - Equipment





Equipment



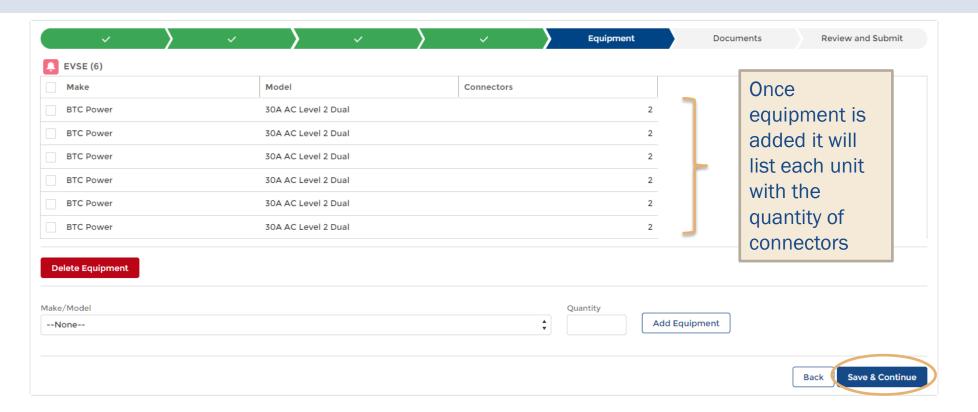
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Uploading Documents



Required Documents for Tier Tier **Upload** Site Verification Form Final Site Design **Issued Building Permit** Preliminary Site Design Building Permit Application **Community Connection** Documentation Letters of Support **Detailed Budget**

Resources



Site Verification Form



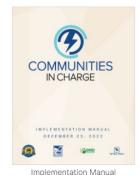
Make sure to complete this editable PDF to upload to the IPC.



Sample Supporting Documents



Use this resource to see what these different required documents look like.

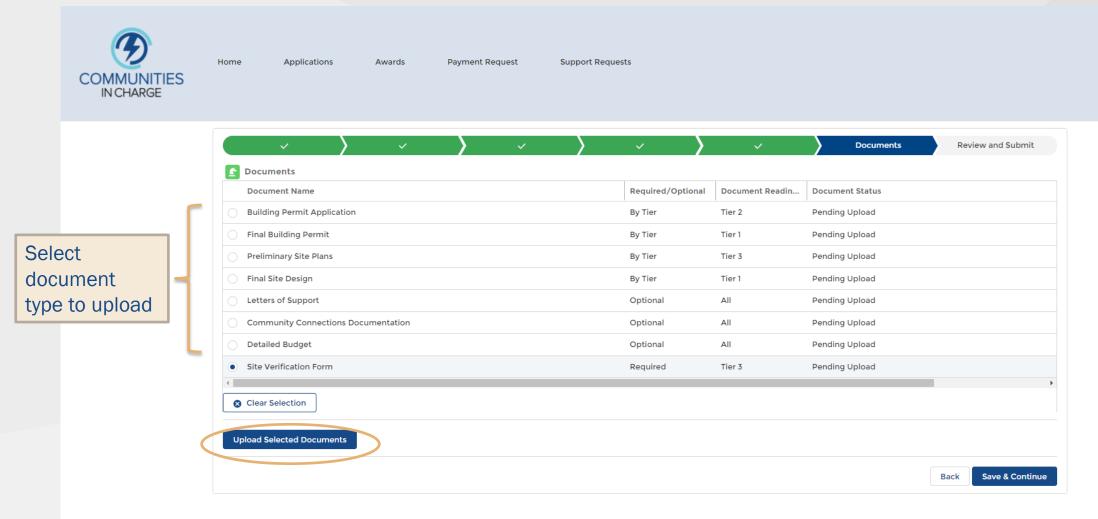


Implementation Manual



Use the implementation manual to ensure you have the correct documents to qualify for a community connection.

Applications - Documents





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Applications - Documents





Applications - Documents



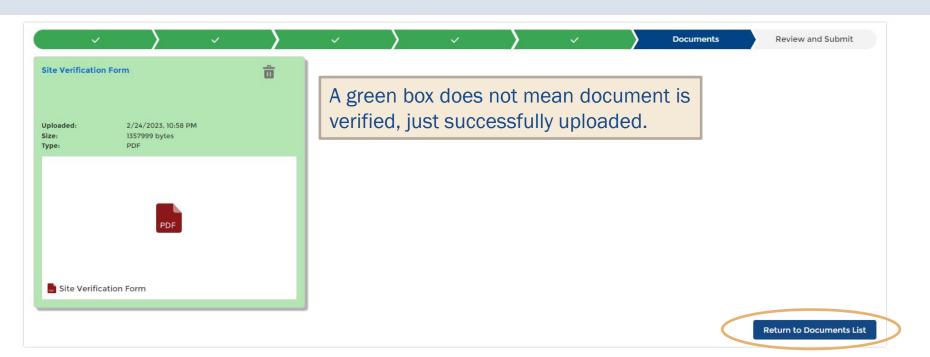
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Applications - Documents



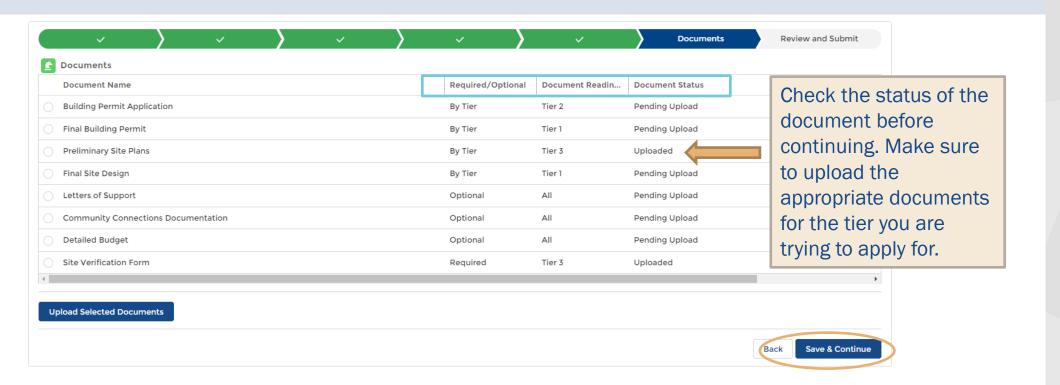
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Applications - Submission



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Review and Submit

By submitting this application to Communities in Charge, you acknowledge to have read, understood, and agree to be bound by the requirements set forth in the current Communities in Charge Implementation Manual as well as the Terms and Conditions.

You agree that an application to Communities in Charge does not constitute a guarantee of award, and any costs incurred are done so at the Applicant's own risk. Should this application be chosen for award, an Incentive Recipient Agreement must be executed prior to payment of any incentives.

I agree to the terms.

Back Submit Application

Once you are here, you are almost done with your application. Make sure to check the terms box and submit!









- Start a new application
- View all existing applications



- Applications which have received awards
- Awardees will be notified of award status via email



Payment Requests

- Submit a request for midpoint or final payment.
- Submit all documentation needed for the request.
- Track your submitted payment requests.



Support Requests

- Submit requests for support from incentive processing team.
- Submit supporting documentation.
- Request an extension.





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Awards

If your application is chosen for a Conditional Award or a Final Award, it will show up in the table below. If an application window is still open, applications have not yet been processed, or none of your applications have been selected for award, then no awards shall be displayed.

If you wish to submit a request for payment on one of your eligible awards, click "Payments" in the menu above.

AWARDS

Award Name	Award Type Project Step	Address
Foo Fighters Lane 0000066	Final Award Awarded	5645 Foo Fighters Lane, Testington, California 90000

View All



- Status of award will be communicated via email but also visible on this tab.
- Use the table on the next slide to understand the definitions for Award Type and Project Step.



Key Terms

Award Type		
Conditional Award	Your Application was chosen for a Conditional Award, meaning the materials and information provided with your Application placed it in Readiness Tiers 2 or 3. You have 90 calendar days to submit a support request of the following type: "Submit Additional Documentation - Application". This support request MUST include a copy of your issued Final Building Permit and a copy of the Final Site Plans for the project site contained in your application.	
Final Award	Your Application was chosen for a Final Award, meaning the materials and information provided with your Application placed it in Readiness Tier 1. Communities in Charge Staff shall provide you with an Incentive Recipient Agreement for your review and signature. Once executed, you must submit for a Request for Final Payment within 270 calendar days.	

Project Step		
Submitted	Your Application was successfully submitted.	
In Review	Your Application and associated materials are under review by Communities in Charge Staff.	
Request for Additional Documentation	One or more items from your Application require attention. Log in to the IPC and review the Application Notes associated with this particular Application.	
Scored	Your Application has been evaluated by Communities in Charge Staff and given a score.	
Awarded	Your Application has been chosen for Award!	
Not Awarded	Your Application was not chosen for Award. Log in to the IPC and review the Application Notes associated with this particular Application for more information on why, and any guidance regarding next steps.	

Payment Request







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Documents Required for Payments

MidPoint Payment

(a one-time request to receive up to 50% of the amount listed on the Notice of Final Award.)

- √Copy of Invoice(s)
- ✓ Signed copy of Job Site Installation Information
- ✓ Only recipients of a Notice of Final Award may be eligible to request a Midpoint Payment.

Final Payment

- √Copy of Invoice(s)
- ✓ Signed copy of Job Site Installation Information
- ✓ Copy of signed Final Inspection Card
- ✓ Copy of paid and executed Network Agreement/
 Contract
- √ Photos of Installed Equipment

Resources



Sample Supporting Documents



Use this resource to see what these different required documents look like.



Implementation Manual



Use the implementation manual to ensure you have the correct documents.



Email the project team at communitiesincharge@calstart.org or the incentive processing team at CICprocessing@tetratech.com



Payment Request



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Communities in Charge - Payment Request

submitting for a

payment request,

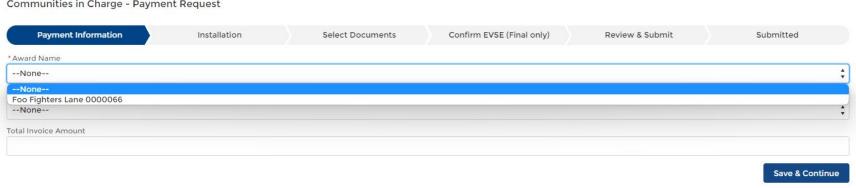
select

When

award from

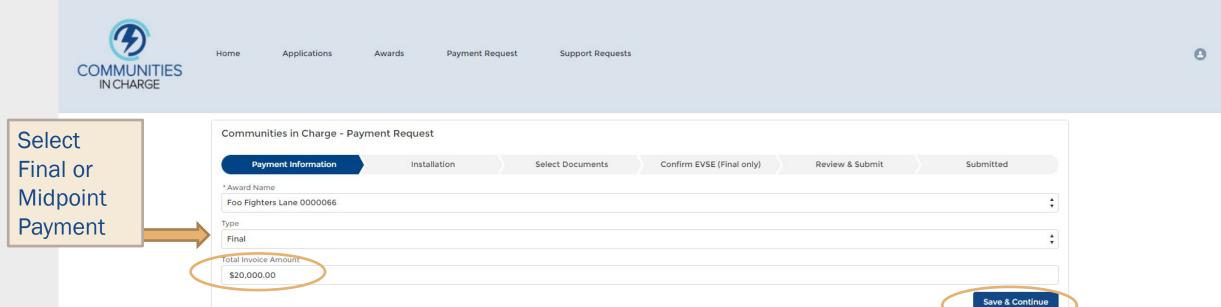
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menu.

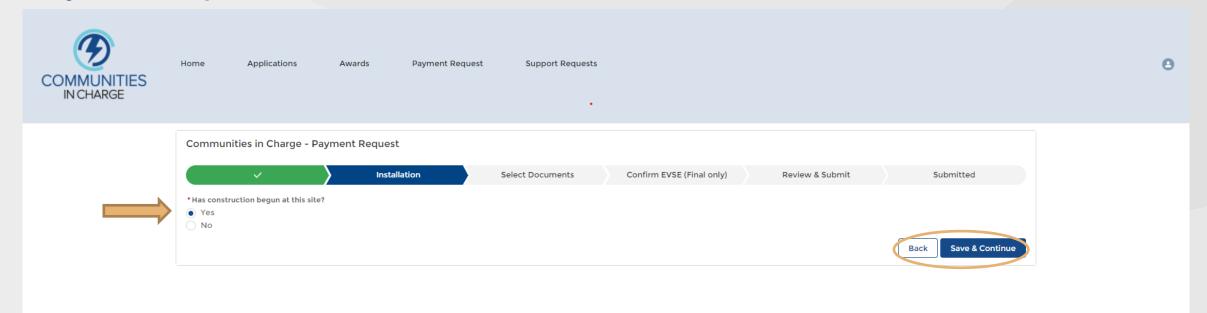




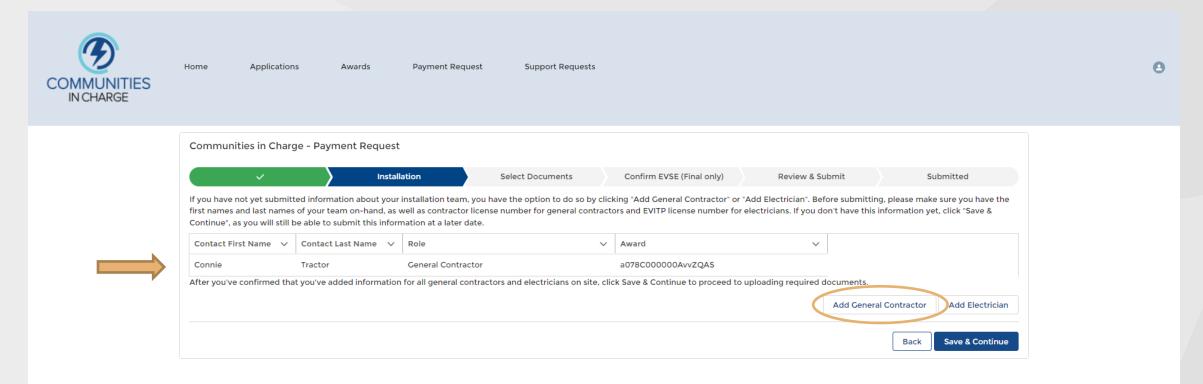
Payment Request















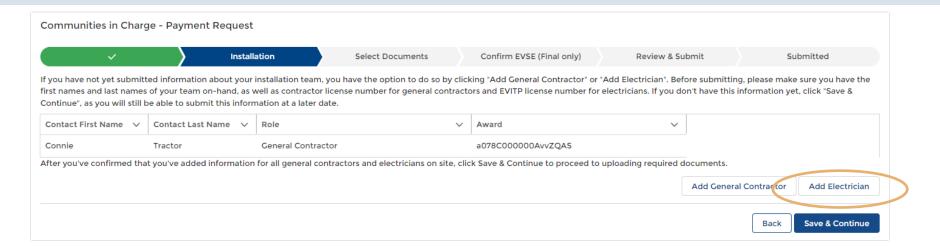
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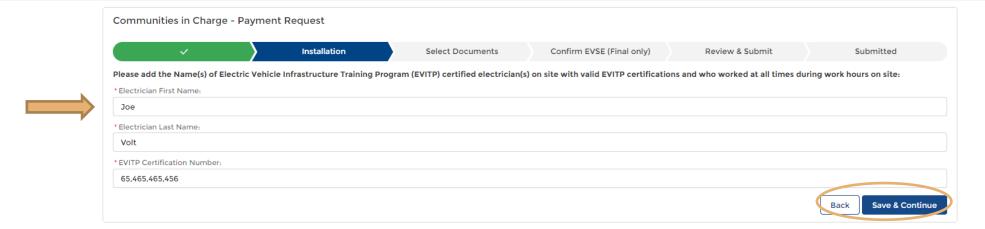
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Payment Request - Select Documents



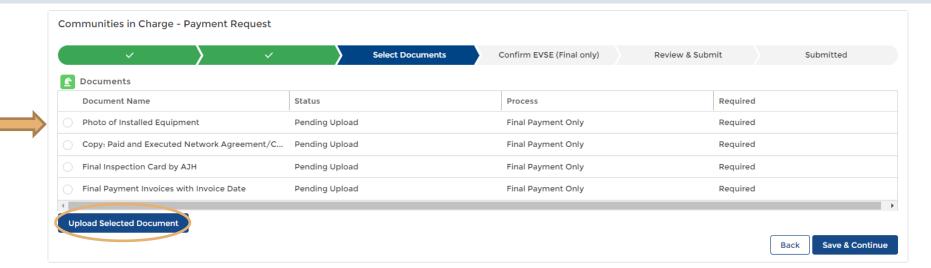
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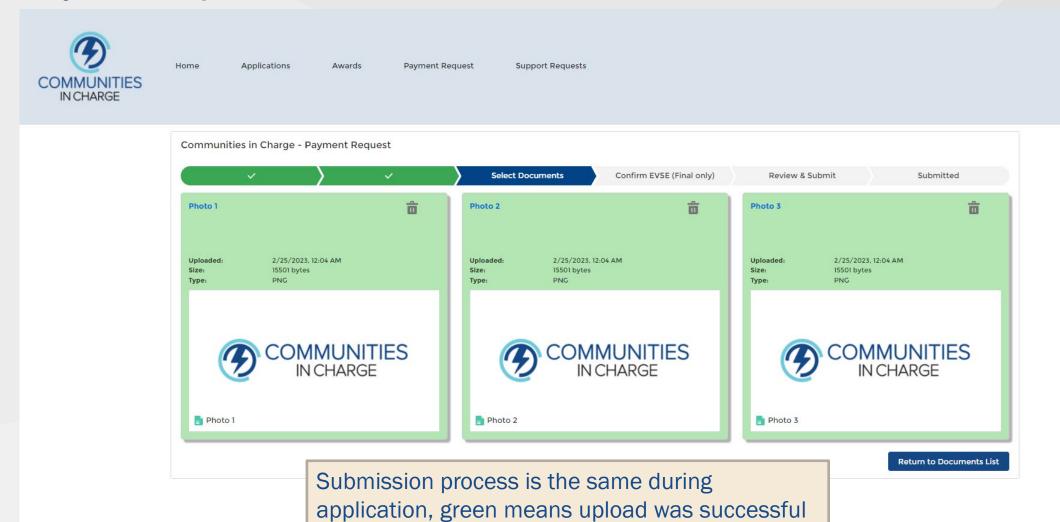
Payment Request

Support Requests





Payment Request - Select Documents



but not yet reviewed.



Payment Request - Select Documents



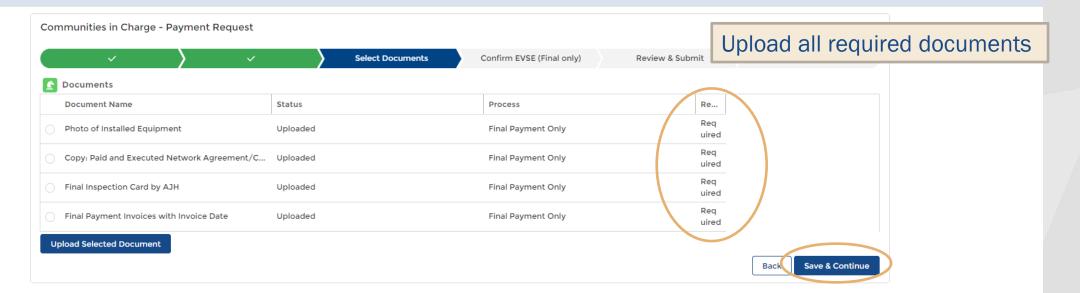
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Payment Request - Confirm EVSE



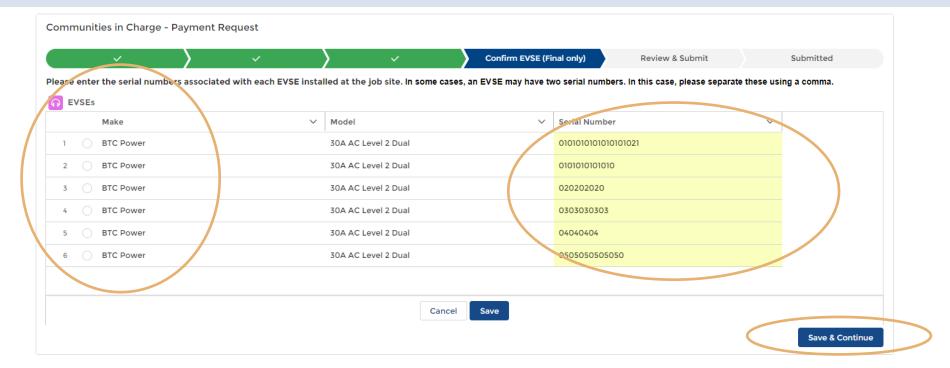
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- EVSEs will be prepopulated from applications.
- Enter serial numbers for all EVSEs.



Submit a Support Request





Applications

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- View all existing applications



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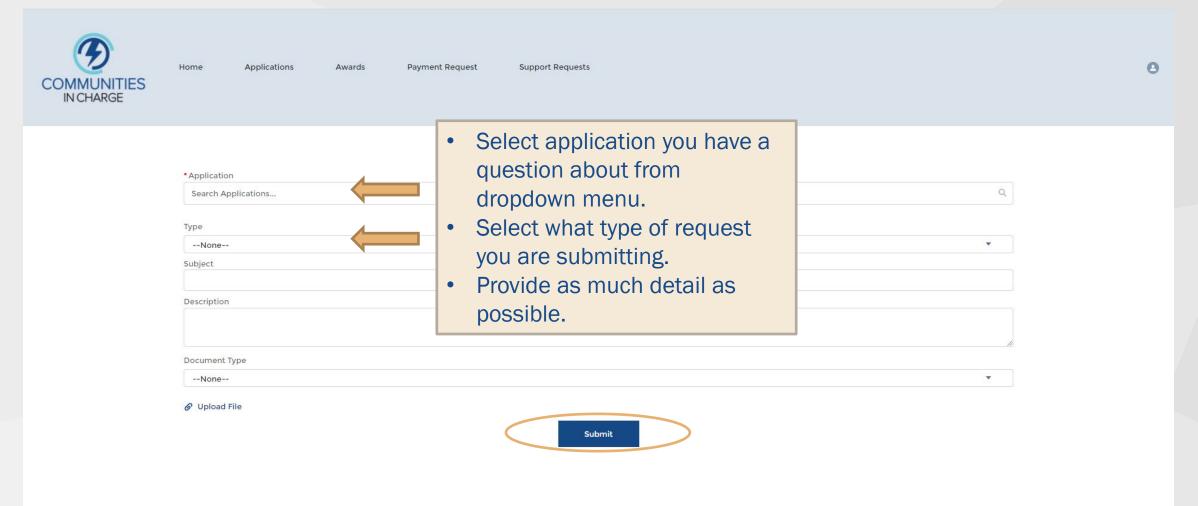


Support Requests

- Submit requests for support from incentive processing team.
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- Request an extension.



Support Request





Support Request



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Support Requests

Here is where you can submit a request to update your Applicant contact information, request an extension, or submit additional documentation which may be necessary to secure a Notice of Final Award. Existing support requests and their respective statuses can be found below. If you wish to submit a new Support Request, click "Submit a Support Request" below.

Submit a Support Request

SUPPORT REQUESTS

Case Number	Туре	Site Address	Status
00001031	Submit Additional Documentation - Application	5645 Foo Fighters Lane, Testington, California 90000	Submitted





Post Project Completion

Provide Level 2 EVSE usage data for 24 months (2 years).



Ensure each Level 2 EVSE is "up" at least 97% of a site's standard hours of operation for 24 months (2 years).



Level 2 EVSEs shall remain in service at the Installation Address for the duration of their Network Service Agreement, or at least 24 months (2 years) from final commissioning.



Must submit reports and respond to surveys put forth by Communities in Charge Staff for a period of 36 months (3 years).



Must be available for follow-up inspection if requested by Communities in Charge Staff, CEC, or CEC's designee.





Upcoming Dates

Event/Item	Timeline
Implementation Manual Posted	December 23, 2022
Application Packet Posted	February 2023
Sample Supporting Documents Posted	February 2023
Full Website Launch	Week of March 20 th , 2023
Applications Open	March 23, 2023 (9 am PST)





Contact Us

- Visit the Communities in Charge Project Webpage at <u>www.thecommunitiesincharge.org</u>
- Contact us with additional questions at: <u>CommunitiesinCharge@calstart.org</u>
- Sign up for office hours! Communities in Charge staff have reserved several time slots each week to answer your questions virtually. Use this <u>Calendly</u> to set up an office hour time with us.
- The webinar materials and recording will be made available.
- Visit <u>CEC Docket 22-EVI-02</u>:
 - View all Communities in Charge Webinars and presentations





Questions and Discussion

Two ways to comment or ask questions:

- **1. Use the raise hand function in Zoom** Zoom Phone Controls:
- *6 Toggle mute/unmute
- *9 Raise hand
- 2. Type questions in the Zoom Q&A Box

Please state your name and affiliation. Keep questions under 3 minutes to allow time for others.





THANK YOU







