

DOCKETED

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GFO-22-609 Pre-Application Workshop Responsive, Easy Charging Products With Dynamic Signals (REDWDS)

**Fuels and Transportation Division
March 23, 2023 | 10 a.m. – 12 p.m.**



Welcome

GFO-22-609: Responsive,
Easy Charging Products With
Dynamic Signals (**REDWDS**)

We'll begin at **10:01 a.m.**

10:01 | Introduction

~10:06 | REDWDS Policy Drivers and Context

~10:10 | CEC Efficiency Division Presentation
Load Management Standards and MIDAS

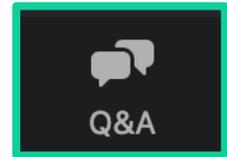
~10:25-noon | REDWDS solicitation details
Including: Solicitation overview, project
requirements, application components,
evaluation criteria, application submittal, Q&A



Housekeeping

- Workshop recording and any updates to solicitation documents will be posted on the [REDWDS Grant Funding Opportunity webpage](#)

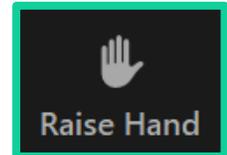
- Enter questions during the workshop into the **Q&A box**



- Spoken questions are also welcome during the workshop:

Phone: *9 to raise/lower hand, *6 to unmute/mute

Zoom: Click **Raise Hand** and we will enable your audio



- Submit written questions after the workshop :

Angela Hockaday, Commission Agreement Officer

Angela.Hockaday@energy.ca.gov

Subject: GFO-22-609 REDWDS

Submission deadline: **Wednesday, March 29, 2023 by 5:00 PM**

Anticipated distribution of CEC response: Week of April 17, 2023



Commitment to Diversity

The CEC adopted a resolution strengthening its commitment to diversity. The CEC continues to encourage disadvantaged and underrepresented businesses and communities to engage in and benefit from our many programs.

CEC staff conducts outreach efforts and activities to:

- Engage with disadvantaged and underrepresented groups throughout the state;
- Notify potential new applicants about the CEC's funding opportunities;
- Assist applicants in understanding how to apply for funding from the CEC's programs;
- Survey participants to measure progress in diversity outreach efforts.



Diversity Survey



Scan the code on a phone or tablet with a QR reader to access the survey.

One Minute Survey ([link](#))

The information supplied will be used for public reporting purposes to display anonymous overall attendance of diverse groups.

Zoom Participants, please use the link in the chat to access the survey or scan the QR code on the left of the screen with a phone or tablet to access the survey.

Survey will be closed at the end of the day.



Find Partners on EmpowerInnovation.net

Empower Innovation aims to accelerate your clean tech journey with easy access to funding opportunities from the Energy Commission and others, resources and events, and connections to people and organizations.

www.empowerinnovation.net

FIND A PARTNER

Announce your interest in funding opportunities and message potential project partners directly.

RESOURCES & TOOLS

Browse the collection of resources including Resource Libraries, Funding Sources, Tools, and Databases.



Clean Transportation Program

- Established in 2007 by Assembly Bill 118 (2007)
- Extended to January 1, 2024, by Assembly Bill 8 (2013)
- Provides approximately \$95 million of funding per year through 2023
- Further supported by contributions from the state General Fund
- Investment Plans determine funding allocations across various categories



GFO 22-609 REDWDS

Policy Drivers and Context



State trends: More compensation options for electric load flexibility and rising EV adoption

Utilities are introducing dynamic rates, demand response programs, and other strategies to **reward grid friendly electricity consumption**

- Customers may find these complicated or may not care

Growing electric load as Californians **switch to electric vehicles (EVs)**

- EV charging load can be significant *and* flexible (time and place)
- Most customers don't want to think much about charging and just want their EV to be ready when they need it

→ With the right programs and tools, EV charging can be **grid friendly and help customers save money without compromising mobility**



REDWDS aims to combine various ingredients into grid responsive, easy charging products



(1) Ingredients

Menu of grid friendly customer programs

Rising EV adoption

CEC charger tech requirements

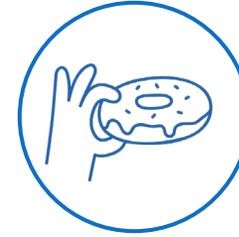


(2) REDWDS Project

Project requirements

Product development, customer deployment

CEC funding



(3) Commercial Product

Grid responsive

Easy to use

Creates value for the customer



Presentation from CEC Efficiency Division

Load Management Standards and MIDAS



California Energy Commission - Market Informed Demand Automation Server (MIDAS)



Mass-Market Demand Flexibility
through Responsive Automation

Stefanie Wayland

Load Management Standards Lead

Efficiency Division, California Energy Commission

March 23, 2023



Adopted Load Management Standards

1

Rate Database

- Maintain the accuracy of existing and future time-varying rates in the publicly available and machine-readable MIDAS rate database.

2

Third-Party Services

- Develop a standard rate information access tool to support third-party services (RateID/RIN)

3

Hourly Rates

- Develop and submit locational rates that change at least hourly to reflect marginal wholesale costs.

4

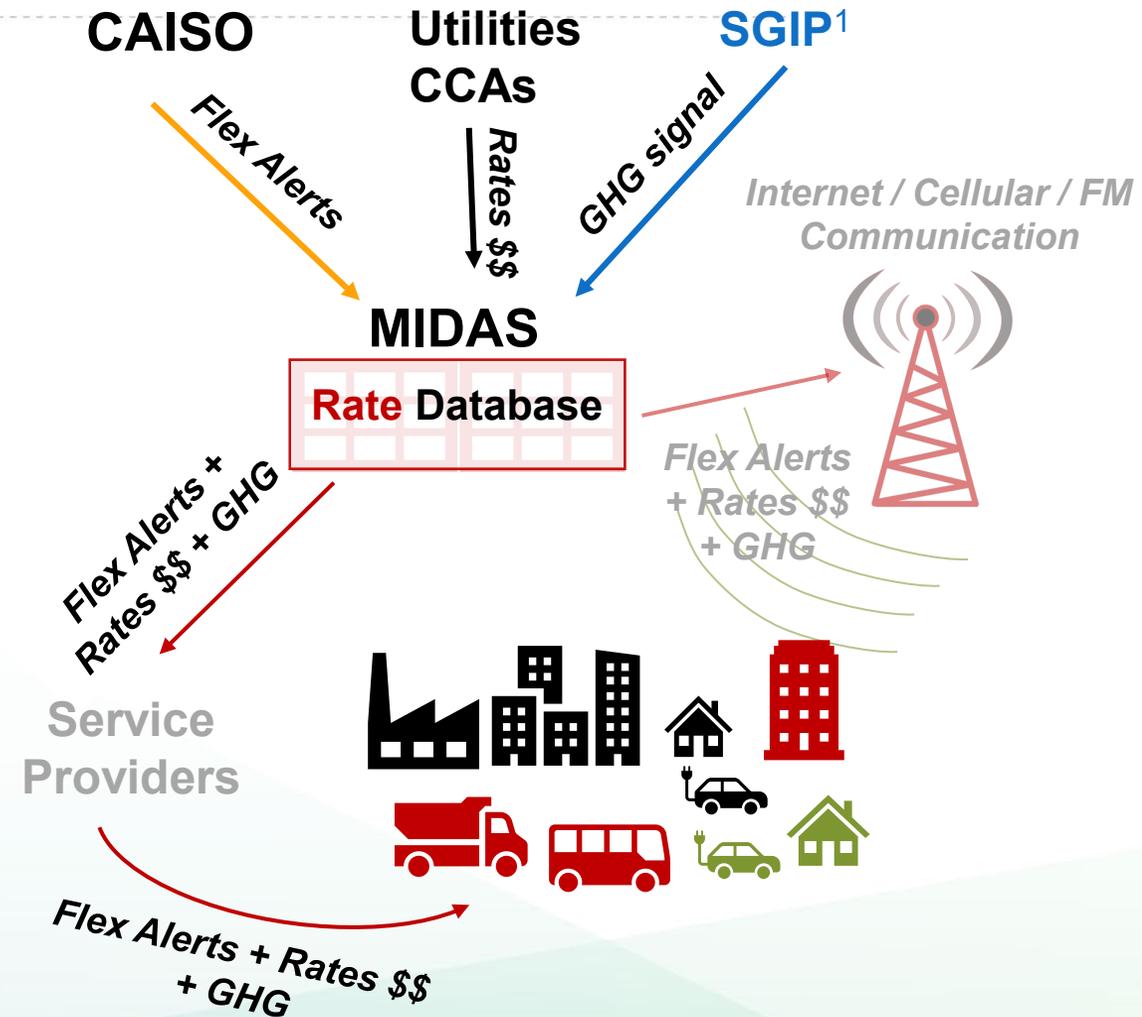
Customer Education

- Integrate information about new time-varying rates and automation technologies into existing customer education and outreach programs.



1. MIDAS Rate Database

- MIDAS Database available at <http://midasapi.energy.ca.gov>
- Starting July 2023: Provides access to all time-varying rates from included utilities and CCAs
- Includes Greenhouse Gas and Flex Alert signals
- **Standard:** Utilities upload and maintain all time-dependent rates



¹ SGIP = Self Generation Incentive Program (CPUC-mandated)



Basic Tenets

All customers should be able to

- Readily find the current price of electricity for their building
- Connect their devices to their time-varying electricity rate
- Quickly give their energy service provider access to their rate
- Choose to receive prices or GHG signals that change hourly or sub-hourly
- Purchase automation that can respond to price or GHG emission signals
- Feel confident that cybersecurity risks are low or nonexistent

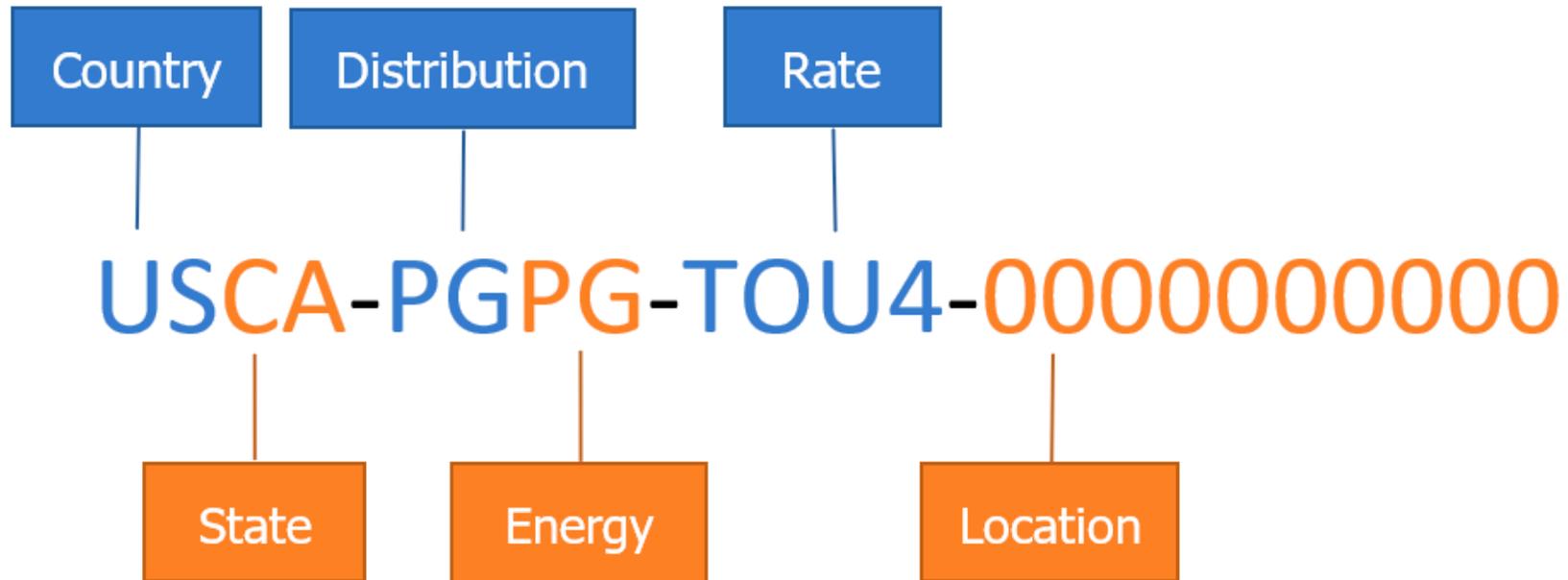


Notes

- Users and third-parties need access to the electricity user's RIN
 - RINs on bills and LSE websites – by April 1, 2024
 - Single statewide rate tool – allows authorized parties access to an electricity user's RIN – by late 2025
- Rates in MIDAS include time-varying volumetric portion but not all fixed charges
 - Calculating total bills requires outside information, some private (bill start date, fixed charges, tiers, etc.)



Rate Identification Number (RIN)





API Rate Data Output

```
1  {
2    "RateID": "USCA-TSTS-TTOU-TEST",
3    "SystemTime_UTC": "2023-03-21T16:34:42.906Z",
4    "RateName": "CEC TEST24HTOU p2",
5    "RateType": "Time of use",
6    "Sector": null,
7    "API_Url": null,
8    "RatePlan_Url": null,
9    "EndUse": null,
10   "AltRateName1": null,
11   "AltRateName2": null,
12   "SignupCloseDate": null,
13   "ValueInformation": [
14     {
15       "ValueName": "winter off peak",
16       "DateStart": "2023-03-02",
17       "DateEnd": "2023-03-02",
18       "DayStart": "Thursday",
19       "DayEnd": "Thursday",
20       "TimeStart": "08:00:00",
21       "TimeEnd": "08:59:59",
22       "value": 0.1006,
23       "Unit": "$/kWh"
24     },
25   ]
26 }
```

← Rate in JSON

* Available at <https://midasapi.energy.ca.gov>

Output also available in XML format



Thank You!

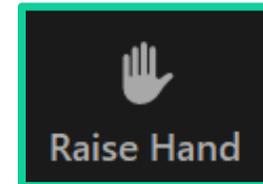
Contact: stefanie.wayland@energy.ca.gov or midas@energy.ca.gov



LMS and MIDAS: Q&A

Questions? Use Q&A box or the following:

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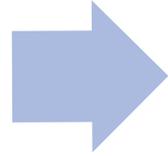
GFO 22-609 REDWDS

Solicitation Overview

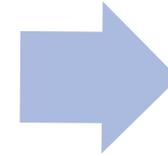


Solicitation Process

Pre-Solicitation Workshop
July 2022

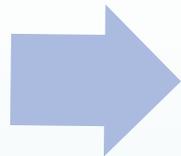


Solicitation Release
March 10

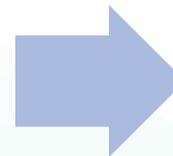


Applications Due
May 26

Notice of Proposed Awards
July 2023



CEC Business Meeting
Q3/Q4 2023



Project Start
Q4 2023



(Optional) 2-Phase Project Opportunity

- To enable rapid scale up, REDWDS supports up to 2 project phases:
 - Phase 1 is required for all projects
 - Phase 2 is optional and would include **additional funding** to support additional customer deployments and data reporting
- Applicants interested in pursuing Phase 2 must propose Phase 2 activities as part of their original REDWDS application
- Projects may only proceed to Phase 2 if they meet certain performance metrics during Phase 1 (see II.B.4) and funding is available



Available Funding and Maximum Award

- A total of **\$9 million** is available under this solicitation for Phase 1
 - Minimum award \$350,000, maximum award \$2.5 million
- Additionally, **up to \$300 million** may be available for awarded projects to continue to Phase 2 (additional customer deployments)
 - Minimum award \$350,000, maximum award \$50 million for Phase 2
 - Funding for Phase 2 is not guaranteed and subject to availability
 - Additional details about the Phase 2 framework will be discussed later



Applications and Awards

- Limit one application per applicant
- The CEC will screen and score applications
- The projects with the highest overall ranking and at least the minimum passing score (70 percent) will be recommended for funding until all Phase 1 funds available under this solicitation are exhausted
- If remaining solicitation funds are insufficient to fully fund a grant proposal, the CEC reserves the right to recommend partially funding that proposal



Eligible Applicants (1/2)

- This solicitation is open to:
 - Electric vehicle service providers (EVSPs) or charging network companies
 - Electric vehicle supply equipment (EVSE) manufacturers
 - Electric vehicle charging software and hardware providers
 - Automation service providers that manage or aggregate charging
 - Vehicle manufacturers
- **Key partners** may be included on the project team
 - No limitations on types of entities for key partners
 - May include community-based organizations, local governments, cities, municipalities, transit agencies, contractors, and others



Eligible Applicants (2/2)

- Applicants must accept the Clean Transportation Program Terms and Conditions, without negotiation.
- Applicants are required to register with the California Secretary of State and be in good standing to enter into an agreement with the CEC.



Minimum Requirements

REDWDS projects are roughly split into three parts:

1

Product development

2

Customer deployment

3

Data reporting

Minimum requirements for each part are described in subsequent slides. A project with Phase 1 only would include all three parts described above. A project with an additional Phase 2 would include additional customer deployments and data reporting (parts 2 and 3).



Minimum Requirements

Product Development (1/4)

Product developed under this solicitation must, at minimum:

- | | |
|-----|--|
| 1-1 | <p>Be capable of automatically retrieving grid signals. At minimum, products:</p> <ol style="list-style-type: none">1. Must be capable of retrieving electricity rates and Flex Alerts from MIDAS.2. Must be capable of receiving Emergency Load Reduction Program (ELRP) and Demand Side Grid Support Program (DSGS) event notifications.3. May <i>optionally</i> integrate with other application programming interfaces (APIs) needed to retrieve grid signals and execute transactive energy tenders, such as TeMix's API for the Southern California Edison (SCE) Dynamic Rates Pilot. |
|-----|--|



Minimum Requirements

Product Development (2/4)

Product developed under this solicitation must, at minimum:

- | | |
|-----|--|
| 1-2 | Be capable of optimizing vehicle charging in response to the dynamic signals described in 1-1 and customer needs and preferences . Products must be capable of scheduling or otherwise managing charging in response to grid signals while ensuring that driver needs, including requested energy/range and departure time, are met. This may involve the use of artificial intelligence and machine learning. Given ISO 15118 Ready requirements in CEC's block grant projects, EVSE products <i>should</i> be capable of using ISO 15118 to retrieve energy and departure time requests from compatible vehicles. |
|-----|--|



Minimum Requirements

Product Development (3/4)

Product developed under this solicitation must, at minimum:

- | | |
|-----|---|
| 1-3 | <p>Include one or more customer interfaces to support all of the following:</p> <ul style="list-style-type: none">• Collect inputs such as the customer's Rate Identification Number and charging preferences.• Explain how charging will be optimized.• Explain how responding to grid signals will create value for the customer. Customer value is broadly defined and could mean a tally of electricity bill savings, an attractively priced subscription for the customer's charging needs (such as a flat monthly rate for unlimited charging), other reward points and gamification, and so on.• Notify the customer of additional savings opportunities such as grid emergency events. |
|-----|---|



Minimum Requirements

Product Development (4/4)

Product developed under this solicitation must, at minimum:

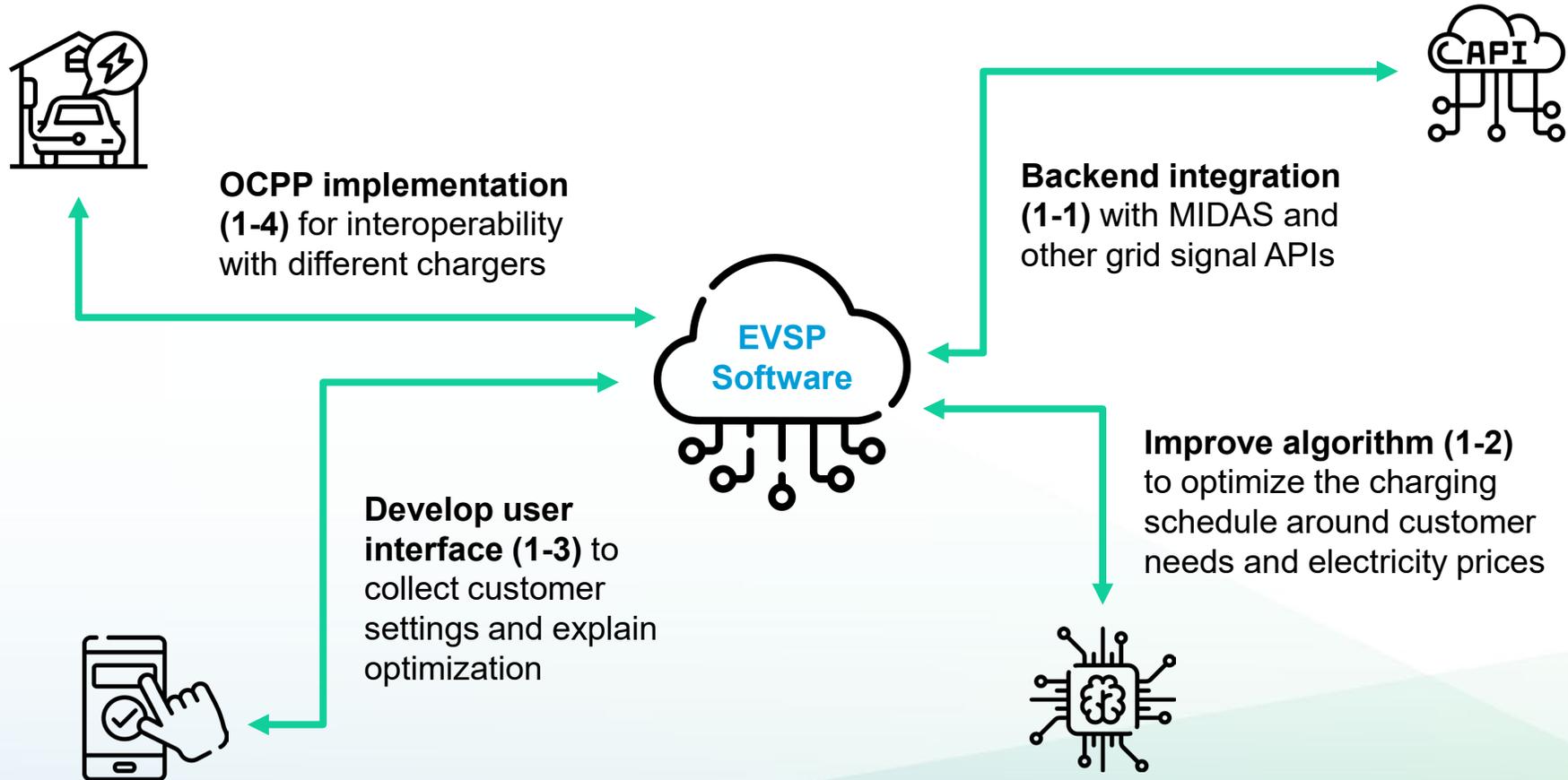
- 1-4 Support interoperability. At minimum:
- Charging station management system products must be **OCPP compliant and certified** by the [Open Charge Alliance](#). Products must support network migration without the need for additional fees, tools, or site visits.
 - EVSE products must be **OCPP compliant and certified** by the [Open Charge Alliance](#). Products must support network migration without the need for additional fees, tools, or site visits. EVSE products *should* also be capable of using ISO 15118 to automatically retrieve energy and departure time requests from compatible vehicles.
 - Aggregation systems using vehicle telematics must be interoperable with multiple vehicle manufacturers.
 - For products not listed in the above categories, the Applicant must describe how the product supports interoperability.



Minimum Requirements

Product Development: Example

This example is from the perspective of an EV charging network or EVSP (sometimes called charge point operator).



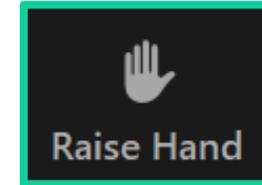


Minimum Requirements

Product Development: Q&A

Questions? Use Q&A box or the following:

- Phone: *9 to raise/lower hand, *6 to unmute/mute
- Zoom: Click **Raise Hand** and we will enable your audio



CEC staff **strongly recommends** submitting any questions during the workshop as formal written questions:

Angela Hockaday, Commission Agreement Officer

Angela.Hockaday@energy.ca.gov

Subject: GFO-22-609 REDWDS

Submission deadline: **Wednesday, March 29, 2023 by 5:00 PM**



Minimum Requirements

Customer Deployment (1/5)

Following product development, projects must deploy the product to customers in California. Customer deployments must meet the following minimum requirements:

- | | |
|-----|--|
| 2-1 | <p>Customer deployments must accumulate 100 or more deployment credits. Each customer deployment receives a certain number of deployment credits depending on the installation type. Applicants shall calculate deployment credits as follows (CEC may verify deployment credit calculations):</p> <ul style="list-style-type: none">• For charging station management system products, one new <u>or</u> existing EVSE connected to the product equals one credit.• For automation service provider or aggregator products, one EV or EVSE connected to the product equals one credit.• For charging hardware products, one new EVSE or other charging hardware unit (minimum 3.3 kilowatts charge power) installed equals one credit. |
|-----|--|



Minimum Requirements

Customer Deployment (2/5)

2-1

⚠️ Exceptions may apply:

- A deployment installing one new **bidirectional EVSE** equals 2.5 credits.
- A deployment installing one new **higher-power EVSE** or charging hardware unit (greater than 22 kilowatts) equals 1 credit for every 4.5 kilowatts of charge power capacity whether unidirectional or bidirectional. Higher-power EVSE used for public fast charging is **not eligible** under this provision.
- Only one of the above exceptions may apply to a deployment. For example, a deployment installing one new 30 kW bidirectional EVSE may count as either 2.5 credits (as a bidirectional EVSE) or $30/4.5 = 6.67$ credits (as a higher-power EVSE).

Each deployment shall only count as one deployment type and applicants may only apply one exception to each deployment.



Minimum Requirements

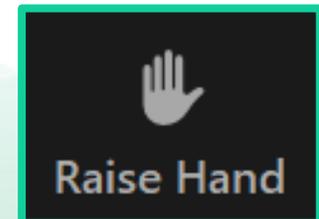
Customer Deployment (3/5)

Example calculations:

- Fictional EVSP Alpha develops an improved charging station management system. Alpha connects 80 existing EVSE and installs 8 new bidirectional EVSE. This totals $80 + 8 \times 2.5 = 100$ credits with **88 actual deployments**.
- Fictional EVSE Manufacturer Beta develops a line of EVSE models. Beta installs 5 30kW unidirectional EVSE, 5 30kW bidirectional EVSE, and 34 19.2kW unidirectional EVSE. This totals $5 \times (30/4.5) + \text{Max}[5 \times 2.5, 5 \times (30/4.5)] + 34 = 100.7$ credits with **44 actual deployments**.

Questions? Use Q&A box or the following:

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- Zoom: Click **Raise Hand** and we will enable your audio





Minimum Requirements

Customer Deployment (4/5)

2-2	Deployments must span at least three distinct California electric utility customer accounts at unique service addresses. For example, a deployment of 100 EVSE to a single fleet operator at one address does not fulfill this requirement. All deployments must be in California.
2-3	At least 50 percent of deployments must be in a disadvantaged or low-income community based on the California Climate Investments Priority Populations 2022 CES 4.0 map .
2-4	At least 35 percent of deployments must be with customers who enroll in a dynamic or transactive energy rate . All remaining deployments must be with customers enrolled in a time varying rate, such as a time of use rate.
2-5	Any EVSE funded through this solicitation must be: <ul style="list-style-type: none">• Safety certified by a Nationally Recognized Testing Laboratory.• Compliant with OCPP and certified by the Open Charge Alliance (EVSE models with documentation of pending OCPP certification are eligible).



Minimum Requirements

Customer Deployment (5/5)

2-6	Deployments installing new charging infrastructure must comply with all applicable AB 841 requirements (Electric Vehicle Infrastructure Training Program certifications) . See page 15 of the Solicitation Manual for details.
2-7	<p>All deployments must be at existing structures or facilities and involve negligible or no expansion of existing or former use. Acceptable deployments may include installations at existing single-family homes, existing parking lots at multi-family homes, existing fleet vehicle lots, and similar site types.</p> <p>⚠ Note: The likelihood that CEC can complete a timely CEQA review (see Section III.D.9) may be increased if <u>the project limits deployments to a single site type</u> with deployment details known in advance (for example, all customer deployments will be new chargers installed at existing residences, or all customer deployments will be using existing chargers at existing fleet lots).</p>

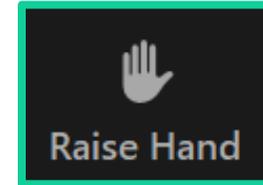


Minimum Requirements

Customer Deployment: Q&A

Questions? Use Q&A box or the following:

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Minimum Requirements

Data Reporting (1/4)

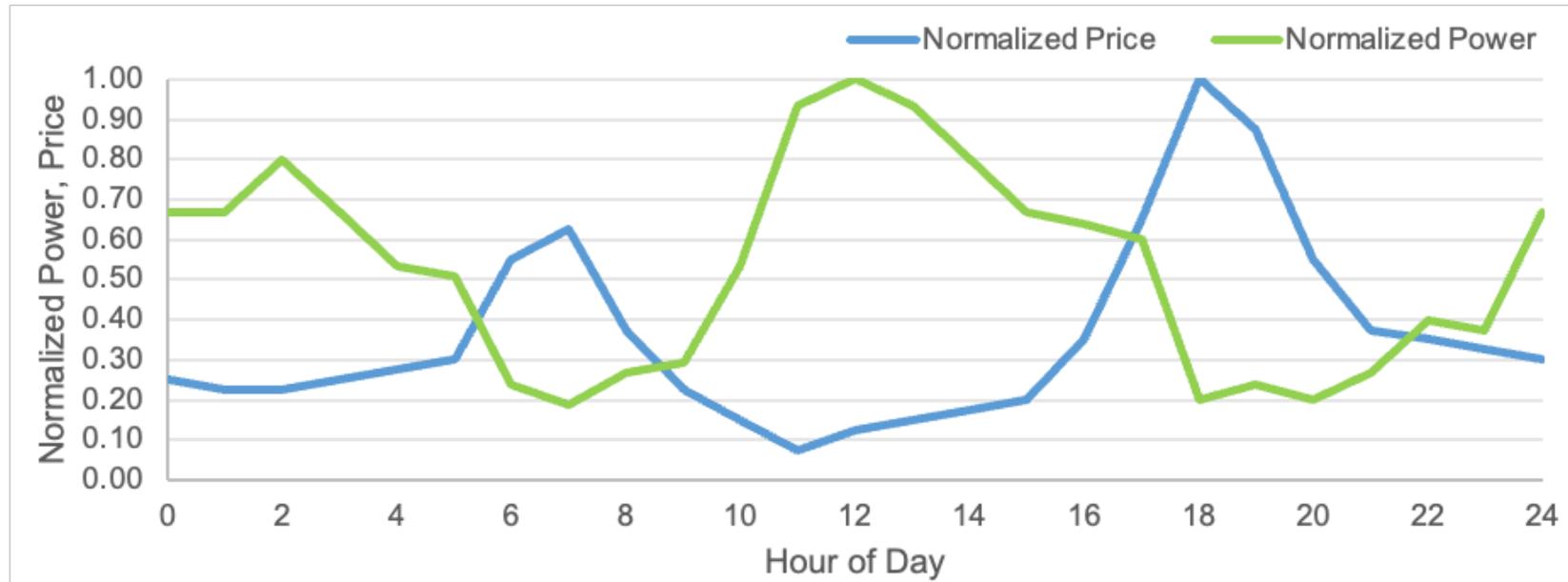
Projects must collect data for at least 12 months on all funded deployments. Minimum data collection and reporting requirements are:

- | | |
|-----|--|
| 3-1 | <p>Sub-hourly Charging Data: For all deployments, record charging power, connector status, and real-time electricity price at 15-minute intervals or more frequently. Sub-hourly charging data shall be made available upon CEC request and does not need to be regularly reported otherwise. See page 16 for details.</p> <p>⚠ Note: Sub-hourly charging data for some deployments (for example, those at single family homes) may be considered confidential information and are subject to additional privacy and security requirements outlined in Attachment 11. CEC will work with recipients to ensure these requirements are included for applicable projects during agreement development.</p> |
|-----|--|



Minimum Requirements Data Reporting (2/4)

3-2 **Monthly Median Normalized 24-Hour Charging Power and Price Profile** (or “normalized profile”): Calculate, record, and plot two normalized profiles for each month: One for all deployments with customers enrolled on dynamic rates, and one for all other deployments. See page 16 for details. Example:





Minimum Requirements

Data Reporting (3/4)

3-3	Average Electricity Price By Month: For all deployments, calculate the average price (\$/kWh) of electricity used for charging that month. May require use of data from 3-1.
3-4	Otherwise-Applicable Average Electricity Price By Month: For all deployments with a customer enrolled on a dynamic rate, calculate the average price (\$/kWh) of electricity for charging that would have been realized that month on an otherwise-applicable electricity rate. Projects shall select an otherwise-applicable electricity rate that can be reasonably viewed as the default time of use rate for a similar customer in the same utility territory.
3-5	Customer Deployment Log: Record basic data on each deployment as the product is deployed to individual customers (see page 17 for a list of required data parameters). Maintain a single spreadsheet for all customer deployments and add to the spreadsheet as the product is deployed to additional customers. A CEC template is available (Attachment 10).



Minimum Requirements

Data Reporting (4/4)

3-6	<p>Other Legislatively Required Data Reporting: EVSE installed using certain legislatively appropriated funds are subject to additional reporting requirements.</p> <p>⚠ Note: Depending on the funding sources used for projects resulting from this solicitation, this data reporting requirement may not apply; CEC will provide clarification during agreement development. This data reporting requirement only applies to deployments installing new EVSE.</p>
3-7	<p>Other Applicable Recordkeeping and Reporting: Chargers installed on or after January 1, 2024, must comply with uptime recordkeeping and reporting standards which CEC is currently developing under AB 2061.</p> <p>⚠ Note: Under AB 2061, “Uptime recordkeeping and reporting standards shall not apply to charging stations installed at residential real property containing four or fewer dwelling units.”</p>

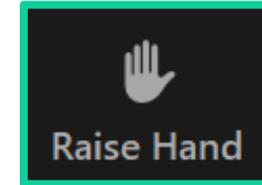


Minimum Requirements

Data Reporting: Q&A

Questions? Use Q&A box or the following:

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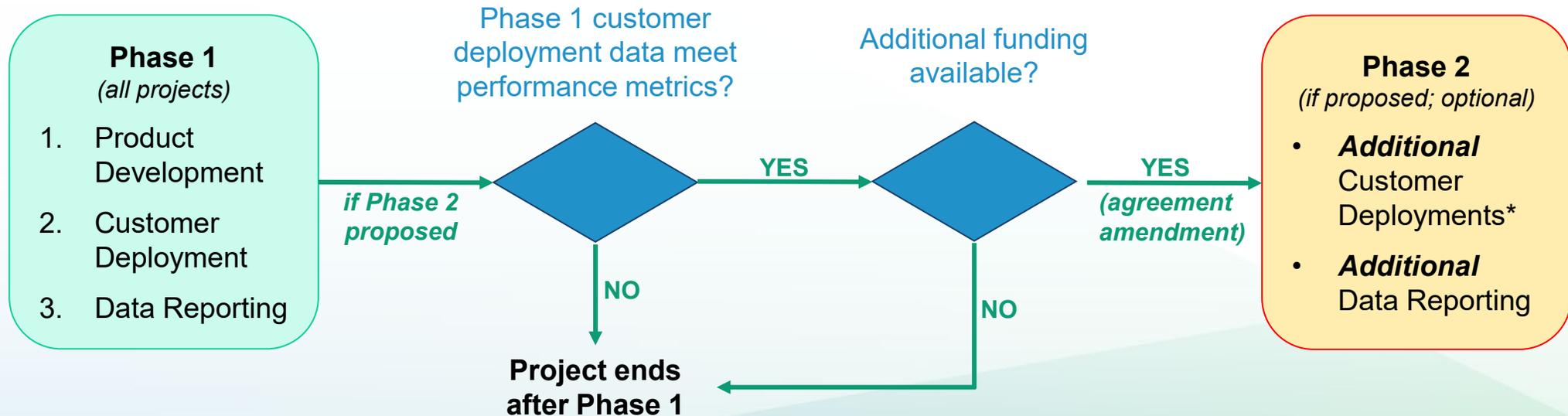
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(Optional) Phase 2 for additional deployments

Projects interested in potentially pursuing Phase 2 must propose Phase 2 activities in their original REDWDS application. Phase 2 funding is subject to availability and is not guaranteed. Funding for Phase 2 is distributed on a first-come, first-served basis for projects meeting the performance metrics.





Minimum Requirements

Phase 2 Eligibility Performance Metrics (1/3)

If data reporting from Phase 1 customer deployments meets **all four** performance metrics below, as determined by the CEC, then the project is eligible to proceed to Phase 2. Projects not meeting all four criteria below are not eligible for Phase 2 funding.

Once the recipient believes their project is eligible for Phase 2, the recipient shall request that CEC begin the Phase 2 eligibility review and amendment process (additional details on this later).

4-1	Grant recipient has completed at least 7 months of data collection and reporting for at least 75 percent of the originally planned Phase 1 deployments with customers on dynamic rates.
-----	--



Minimum Requirements

Phase 2 Eligibility Performance Metrics (2/3)

4-2

Phase 1 data reporting indicates one (or more) of the following:

- **Dynamic rate bill savings:** For at least 6 of the most recent 7 months, at least 75 percent of the installed customers on dynamic rates are reporting lower average electricity prices (\$/kWh) for their charging on their dynamic rate than they would be reporting under the otherwise applicable (non-dynamic) default rate;
- **Off peak integration:** For at least 75 percent of the installed customers on dynamic rates, less than 5 percent of charging energy is consumed between 4 p.m. to 9 p.m. and at least 20 percent of charging energy is consumed between 7 a.m. to 3 p.m. for at least 6 of the most recent 7 months (this latter window is expanded to 3 a.m. to 3 p.m. for June through October);
- **Bidirectional charging:** Grant recipient has completed at least 7 months of data collection and reporting for at least 75 percent of the originally planned bidirectional charging customer deployments. For at least 75 percent of these deployments, the customer has exported power from the vehicle (islanded or grid-interactive load reductions) on at least 10 separate instances for at least 30 minutes per instance. At least 4 of these instances must have occurred in response to a grid emergency event signal. See page 19 for details.



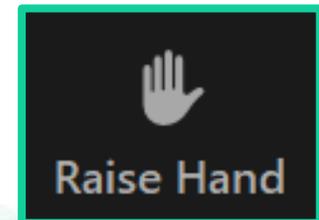
Minimum Requirements

Phase 2 Eligibility Performance Metrics (3/3)

4-3	Match funding is being spent at a pace commensurate with reimbursable funding.
4-4	As determined by the CAM, there are no project concerns including but not limited to lack of responsiveness from the grant recipient and/or project team, reductions to the scope of work, inability to complete the scope of work within the agreement term, and inconsistent or incorrect data reporting.

Questions? Use Q&A box or the following:

- Phone: *9 to raise/lower hand, *6 to unmute/mute
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Minimum Requirements

Phase 2 Customer Deployments (1/2)

Phase 2 requires a **higher percentage of deployments** to be with customers who enroll in a dynamic or transactive energy rate. Customer deployments in Phase 2 must meet the below requirements:

5-1	At least 50 percent of deployments must be in a disadvantaged or low-income community based on the California Climate Investments Priority Populations 2022 CES 4.0 map .
5-2	At least 50 percent of deployments must be with customers who enroll in a dynamic or transactive energy rate . All remaining deployments must be with customers enrolled in a time varying rate, such as a time of use rate.
5-3	Any EVSE funded through this solicitation must be: <ul style="list-style-type: none">• Safety certified by a Nationally Recognized Testing Laboratory.• Compliant with OCPP and certified by the Open Charge Alliance.
5-4	All deployments conform with AB 841 requirements. Refer to Requirement 2-6.



Minimum Requirements

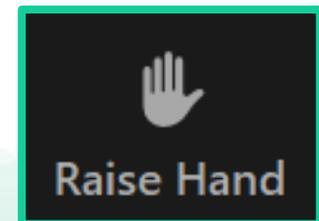
Phase 2 Customer Deployments (2/2)

5-5 All deployments must be at **existing structures or facilities and involve negligible or no expansion of existing or former use** (same as Phase 1).

⚠ Note: The likelihood that CEC can complete a timely CEQA review (see Section III.D.9) may be increased if the project limits deployments to a single site type with deployment details known in advance (for example, all customer deployments will be new chargers installed at existing residences, or all customer deployments will be using existing chargers at existing fleet lots).

Questions? Use Q&A box or the following:

- Phone: *9 to raise/lower hand, *6 to unmute/mute
- Zoom: Click **Raise Hand** and we will enable your audio





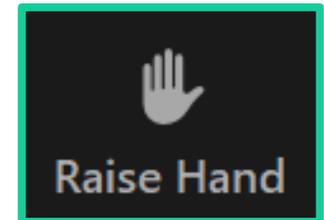
Minimum Requirements

Phase 2 Data Reporting

The project must collect data for at least 12 months on all funded deployments, including Phase 2 deployments. Minimum data collection and reporting requirements for Phase 2 are **identical to those used in Phase 1**; refer to Requirements 3-1 through 3-7.

Questions? Use Q&A box or the following:

- Phone: ***9** to raise/lower hand, ***6** to unmute/mute
- Zoom: Click **Raise Hand** and we will enable your audio





Eligible Project Costs

The following costs are eligible for CEC reimbursement or as match share:

- Labor, materials, equipment, and resources to **administer the grant**
- Labor, materials, equipment, and resources for **product development**
 - This includes and is not limited to software and hardware engineering, software stacks, product testing, interoperability testing
- Labor, materials, equipment, and resources supporting **customer deployment**
 - This includes and is not limited to customer education, outreach, enrollment costs, customer site preparation, planning, installation costs, EVSE
- Labor, materials, equipment, and other resources supporting customer site electrical installation (see page 22 for examples)



Match Funding Requirements

- Applications must include a minimum **25 percent** total match share for Phase 1, and a minimum **50 percent** total match share for Phase 2
 - Of the total match share, applications must include a minimum 50 percent **cash** match share for each project phase (see page 23 for details)
 - Applicants shall submit separate budget forms for Phase 1 and Phase 2

Example match calculation:

	Phase 1	Phase 2	Total
Proposed budget	\$1M	\$2M	\$3M
CEC funding requested	\$750k	\$1M	\$1.75M
Total applicant match	\$250k	\$1M	\$1.25M
Total applicant cash match	\$125k	\$500k	\$625k



Notable Restrictions

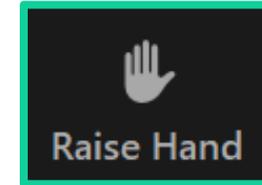
- **Other sources of CEC funding**, including but not limited to funding from CALeVIP and similar block grants, may not be claimed as match share.
 - **Discounted or Refunded Equipment or Software Costs.** For example, a claim that equipment costs \$10,000 but the grant recipient only pays \$6,000 due to a discount. The difference of \$4,000 is not an allowable match share expense.
 - **Utility-provided electrical upgrades and funding** are unallowable costs and may not be claimed as match share. For example, expenses that are already or to be paid for through a utility program, tariff, or other ratepayer funding. This includes ratepayer funded enrollment incentives.
 - **Vehicles** are unallowable costs and may not be claimed as match share. For example, funding may not be used to purchase, lease, or rent vehicles.
- See **pages 24-26** for a full list of restrictions on allowable cost and match funding



Q&A

Questions? Use Q&A box or the following:

- Phone: *9 to raise/lower hand, *6 to unmute/mute
- Zoom: Click **Raise Hand** and we will enable your audio



CEC staff **strongly recommends** submitting any questions during the workshop as formal written questions:

Angela Hockaday, Commission Agreement Officer

Angela.Hockaday@energy.ca.gov

Subject: GFO-22-609 REDWDS

Submission deadline: **Wednesday, March 29, 2023 by 5:00 PM**



GFO 22-609 REDWDS

Submitting an Application



Application Components (complete and submit these forms)

Form	Attachment Number	Action Needed by Applicant
Application Form	Attachment 1	Complete form.
Project Narrative	N/A	Create document. See “Section III.D.2 Project Narrative” below for instructions.
Scope of Work	Attachment 2	Complete document. Include all proposed project activities, including for Phase 2 if applicable.
Schedule of Products and Due Dates	Attachment 3	Complete document. Include all proposed project activities, including for Phase 2 if applicable.
Phase 1 Budget Form	Attachment 4	Complete form. Include budget items for Phase 1 activities only.
Phase 2 Budget Form	Attachment 4	Complete form. Include budget items for Phase 2 activities only; do not submit this item if the project does not include Phase 2.
Resumes	N/A	Submit documents.
Contact List	Attachment 5	Complete form.
Letters of Support/Commitment	N/A	Submit documents if applicable.
CEQA Worksheet	Attachment 6	Complete form.
Localized Health Impacts Information Form	Attachment 7	Complete form.
Past Performance Reference Form(s)	Attachment 8	Complete form.



Application Form (Attachment 1)

- Complete Attachment 1

⚠ Note 1: Unless indicated otherwise, “deployment” refers to an actual, physical deployment, not deployment credit.

⚠ Note 2: Do not include confidential information in *any part* of a submitted application. The CEC **shall not accept** or retain applications that have any portion marked confidential.

ATTACHMENT 01
GFO APPLICATION FORM

[This document provides the California Energy Commission (CEC) with basic information about the Applicant and Proposed Project. Each Applicant must complete and include this Application Form in its application.]

Applicant's Legal Name	Federal ID Number
<input type="text"/>	<input type="text"/>

Title of Proposed Project
<input type="text"/>

Note: Refer to Section I.D (Key Activities and Dates) in the solicitation manual for estimated business meeting approval timeline.

The "Deployment Start Date" is when the Applicant begins installing the product with the first customer. The "Deployment Completion Date" is the date by which all customer deployments for a particular phase are installed, active, and collecting data. For projects without Phase 2, enter "N/A" where appropriate.

Proposed Term	
Project Start Date	Project End Date
<input type="text"/>	<input type="text"/>
Estimated Phase 1 Deployment Start Date	Estimated Phase 1 Deployment Completion Date
<input type="text"/>	<input type="text"/>
Estimated Phase 2 Deployment Start Date	Estimated Phase 2 Deployment Completion Date
<input type="text"/>	<input type="text"/>

Note: If project does not include Phase 2, enter "N/A" for Phase 2 fields.

Proposed Project Funding	Phase 1	Phase 2	Total (Phases 1+2)
Amount of CEC Funds Requested	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Total Match Funding	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Total Cost (sum of two previous rows)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Cash Match	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Total Match Funding Percentage (=Total Match Funding/Total Cost)	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

Application Form Page 1 of 4
Attachment 01 GFO-22-809
REDWDS



Project Narrative

- A detailed description of the project, its objectives, and an explanation of how these will be implemented through the tasks described in the Scope of Work.
- Project Narrative should **respond to each prompt** in Section III.D.2.
- Applicants must address each of the scoring criteria (see Section IV.E) by fully responding to each Project Narrative prompt.
- **Limit 15 pages** at 11 point font.
- The Project Narrative is used by the evaluation committee for scoring.



Project Narrative: Selected highlights (1/3)

3. Collecting Customer Input. Describe the product's capability to collect a range of customer inputs, preferences, and mobility requirements (requested range, departure time, and so on). Describe strategies to automate communication of mobility requirements and minimize manual customer input, including implementation of ISO 15118 for projects involving EVSE.

4. Charge Management and Optimization. Describe how the product will optimize the charging schedule around dynamic grid signals while meeting customer mobility needs and ensuring customer confidence. This may discuss: Predictive algorithms, the ability for customers to customize the charge management strategy, support for transactive energy, and support for bidirectional charging.



Project Narrative: Selected highlights (2/3)

5. **Customer Value.** Describe how the product creates value for the customer by responding to grid signals. That is, describe how the product presents compensation from responding to grid signals in a meaningful way to the customer – this could be a tally of electricity bill savings, a flat rate subscription for charging, non monetary rewards or points, and so forth.

7. **Interoperability.** Describe how the product meets the minimum interoperability requirements and how CEC funding will improve interoperability. Notably, for EVSE, describe connector types supported, software support for ISO 15118, and how CEC funds will help accelerate implementation of ISO 15118-20.

8. **Submetering and Additional Capabilities.** If applicable, describe the product's support for submetering, including coordination with meter data management agents and utilities, as well as any capabilities beyond the minimum requirements.



Project Narrative: Selected highlights (3/3)

9. Phase 1 Deployment Plan. Describe plans for meeting or exceeding minimum Phase 1 deployment requirements (100 deployment credits, 35 percent dynamic rate, and so on). Discuss any coordination with utilities, plans to focus on specific dynamic rate offerings and/or pilots, and the anticipated availability of specific dynamic rates for customer enrollment. Describe any focus segments, regions, and/or communities. Describe any plans for participation in the SCE Dynamic Rates Pilot.

10. Priority Community Engagement, Deployment, and Benefits. Describe plans for ensuring 50 percent of deployments are in a disadvantaged or low income community. Describe plans for context-appropriate outreach, education, and engagement with priority communities, including collaboration with community-based organizations (please specify).



Scope of Work (Attachment 2)

- Complete Attachment 2. The Scope of Work describes exactly what the project will do and identifies what will be delivered to the CEC (for all project phases). The Scope of Work **must mirror what is described in the Project Narrative.**
- For awarded projects, the Scope of Work becomes part of the executed agreement with CEC.
- The Scope of Work template is pre-populated based on REDWDS project requirements and potential phasing. Follow instructions in **<Blue>** to customize the Scope of Work for the proposed project.

Attachment 02
Exhibit A
SCOPE OF WORK

<Instructions are shown in blue within brackets>

TECHNICAL TASK LIST

<Edit the Task numbers and Task names as prompted below for your Agreement. Applicants may leave the CPR column blank – the CPR column will be finalized if the application is recommended for funding.>

Task #	CPR	Task Name
1		Administration
2		Phase 1 Product Development <i><Applicant may modify task name (optional)></i>
3		Phase 1 Customer Deployment <i><Applicant may modify task name (optional)></i>
4		Data Collection and Analysis <i><Applicant may modify task name (optional)></i>
<i><Second to Last Task></i>		Phase 2 Customer Deployment <i><Applicant may modify task name or delete (optional)></i>
<i><Last Task></i>		Project Fact Sheet

KEY NAME LIST

<Insert the key personnel/subcontractors for each Task in your Project. Include Key names only if the value of the project would significantly change without those personnel, subcontractors, or partners. Add additional lines as needed. Key Personnel and Key Subcontractors are paid with match or CEC funds. Key Partners do not provide match or provide CEC funds.>

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	<i><Name></i>	<i><Name></i>	<i><Name></i>
2	<i><Name></i>	<i><Name></i>	<i><Name></i>
3	<i><Name></i>	<i><Name></i>	<i><Name></i>
<i><Etc.></i>	<i><Name></i>	<i><Name></i>	<i><Name></i>

GLOSSARY

Specific terms and acronyms used throughout this scope of work are defined as follows:

Term/ Acronym	Definition
CAM / CAO	Commission Agreement Manager / Commission Agreement Officer
CEC	California Energy Commission
CPR	Critical Project Review
DSGS	Demand Side Grid Support (Program)

March 2023 Page 1 of 27
Attachment 02 - Scope of Work GFO-22-009
REDWDS



Schedule of Products and Due Dates (Attachment 3)

- Complete Attachment 3.
- **Deliverables must correspond to those in the Scope of Work.** Provide realistic dates on when deliverables can be completed (for all project phases).
- For awarded projects, the Schedule becomes part of the executed agreement with CEC.
- The Schedule template is pre-populated based on REDWDS project requirements and potential phasing. Follow instructions in **<Blue>** to customize the Schedule for the proposed project.

Attachment 03 Exhibit A-1 <i>Schedule of Products and Due Dates</i>			
Task Number	Task Name	Product(s)	Due Date
1.1	Attend Kick-off Meeting	Updated Schedule of Products	<Insert Date>
		Updated List of Match Funds	<Insert Date>
		Updated List of Permits	<Insert Date>
		Written Statement of Match Share Activities	<Insert Date>
		Kick-Off Meeting Agenda (CEC)	<Insert Date>
1.2	Critical Project Review Meetings	CPR Report	<CEC will complete>
		1st CPR Meeting	<CEC will complete>
		CPR Meeting Agenda (CEC)	<CEC will complete>
		Meeting Schedule for written determination (CEC)	<CEC will complete>
		Written determination (CEC)	<CEC will complete>
<CEC will complete>	<CEC will complete>	<CEC will complete>	<CEC will complete>
1.3	Final Meeting	Written documentation of meeting agreements	<Insert Date>
		Schedule for completing closeout activities	<Insert Date>
1.4	Monthly Calls	Email to CAM concurring with call summary notes	Within 5 days of receipt
1.5	Quarterly Progress Reports	Quarterly Progress Reports	10th calendar day of each January, April, July, and October during the approved term of this Agreement
1.6	Final Report	Final Outline of the Final Report	<Insert Date>
		Draft Final Report	<Insert Date>
		Final Report (no less than 60 days before the end term of the agreement)	<Insert Date>
1.7	Identify and Obtain Match Funds	A letter regarding match funds or stating that no match funds are provided	<Insert Date>



Budget(s) (Attachment 4)

(1/2)

- The Budget(s) identifies how CEC funds and match funds will be spent to complete the project.
- All applications must include a Phase 1 Budget using the template in Attachment 4. **The Phase 1 budget shall cover only activities in Phase 1.**
- Projects with an additional proposed Phase 2 must include a **separate** Phase 2 Budget using the same template. The Phase 2 Budget shall cover only activities in Phase 2.

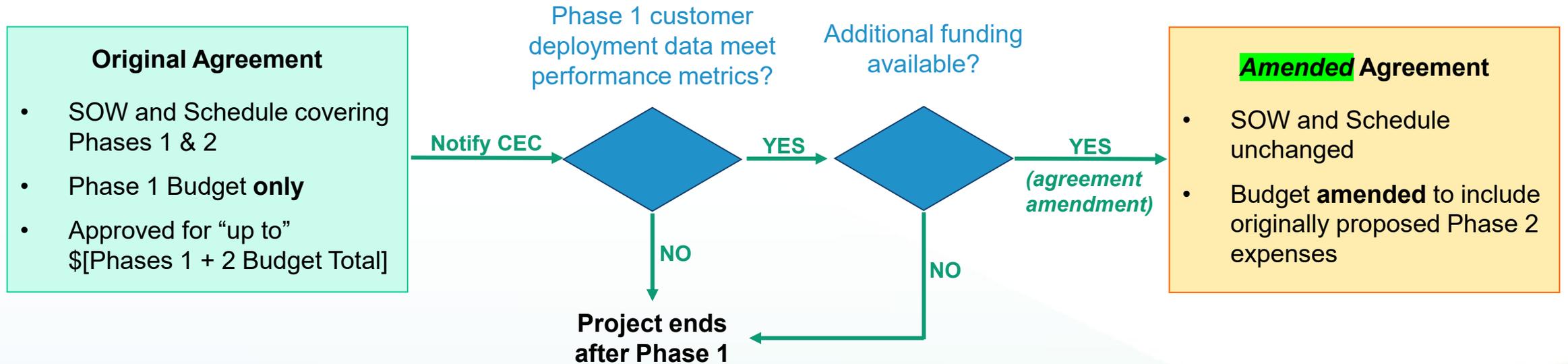
⚠ Note: A separate budget is required for each subcontractor requesting \$100k or more of CEC funds.

PROPOSAL BUDGET			
Category Budget			
Agreement Number	GFO-21-603		
Name of Organization	Organization Name		
Select Recipient or Subrecipient			
Select your company's California Business Certifications			
Cost Category	CEC Share	Match Share	Total
Direct Labor	\$ -	\$ -	\$ -
Fringe Benefits	\$ -	\$ -	\$ -
Total Labor	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ -
Materials/Miscellaneous	\$ -	\$ -	\$ -
Subrecipients/Vendors	\$ -	\$ -	\$ -
Total Other Direct Costs	\$ -	\$ -	\$ -
Indirect Costs	\$ -	\$ -	\$ -
Profit (not allowed for grant recipients)	\$ -	\$ -	\$ -
Total Indirect and Profit	\$ -	\$ -	\$ -
<i>Grand Totals</i>	<i>\$ -</i>	<i>\$ -</i>	<i>\$ -</i>



Budget(s): Process for Phase 2 Amendment (2/2)

Example **budget amendment process** for additional Phase 2 funding:





Resumes

- Applicants must include resumes for key personnel identified in the application.
- Resumes are limited to a maximum of 2 pages each.

FIRST LASTNAME

Construction Worker
Seattle, WA
firstlast@email.com
555-555-5555

Effective at using forklift's, hand trucks and pallet jacks to move merchandise. Skilled at inspecting stock, tagging product and updating computer tracking systems. Well-versed in warehouse operations, inventory audits and loading and unloading procedures.

Eligible to work for any employer in the U.S.

WORK EXPERIENCE

Construction Worker

NewCompany January 2018 to Present

Unpacked and assembled all new merchandise using variety of power tools and lean manufacturing. Heavy Lifting, Measuring, Organize Building Materials. Read and Interpret Drawings. Safety. Supported technicians in equipment maintenance and repair. Organized Warehouse Operations.

Crew Lead

CompanyCo, Inc July 2017 to December 2017

Trained employees so that they were well-educated in time management and the proper ways to complete their job duties. Utilized all machinery and equipment while observing various safety precautions and practices. Ensured that job tasks were completed to standards and in accordance with company guidelines. Maintained the job site on a daily basis and checked to see that all trash and refuse was removed. Completed daily forklift safety checklists. Located proper slots on storage racks and set pallets in place with forklift and pallet jack.

EDUCATION

High school or equivalent

Ged Program - NewCity, NC
April 2015 to February 2016



Contacts List (Attachment 5)

- Include the appropriate points of contact under the Recipient column.
- The CEC will complete the CEC points of contact during agreement development.

**Attachment 05
CONTACT LIST**

Please complete the information in the "Recipient" column.

California Energy Commission	Recipient
Commission Agreement Manager: (TBD by Commission) California Energy Commission 715 P Street, MS-6 Sacramento, CA 95814 Phone: (916) XXX-XXXX e-mail:	Project Manager: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:
Confidential Deliverables/Products: California Energy Commission Contracts, Grants, and Loans Officer 715 P Street Sacramento, CA 95814 Phone: (916) 767-4991	Administrator: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:
Invoices, Progress Reports and Non-Confidential Deliverables to: California Energy Commission Accounting Officer 715 P Street Sacramento, CA 95814 e-mail: invoices@energy.ca.gov	Accounting Officer: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:
Legal Notices: Tatyana Yakshina Grants Manager California Energy Commission 715 P Street, MS-18 Sacramento, CA 95814 Phone: (916) 827-9294 e-mail: tatyana.yakshina@energy.ca.gov	Recipient Legal Notices: Name Company Name Street Address City, State ZIP Phone: (XXX) XXX -XXXX Fax: (XXX) XXX -XXXX e-mail:

Attachment 05 Page 1 of 1 GFO-22-609
REDWDS



Letters of Commitment and Support

- Applicants must include appropriate **letters of commitment** from each key project partner and third-party match share contributor, if applicable. Projects with no additional project partners do not need to submit letters of commitment.
- Applicants may **optionally** submit **letters of support** that detail the estimated demand and/or the potential benefits of the proposed project. Do not submit more than 4 letters of support.
- Letters are limited to 2 pages each.
- See page 37 for details.



CEQA Worksheet (Attachment 6)

- Assists with CEC's CEQA determinations. Refer to pages 37-39 for additional CEQA details.

⚠ Note: The likelihood that CEC can complete a timely CEQA review may be increased if the project limits deployments to a single site type with deployment details known in advance (for example, all customer deployments will be new chargers installed at existing residences, or all customer deployments will be using existing chargers at existing fleet lots).

ATTACHMENT 6

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) WORKSHEET

The California Environmental Quality Act (CEQA) (Public Resources Code §§ 21000 et seq.) requires public agencies to identify the significant environmental impacts of their actions and to avoid or mitigate them, if feasible.¹ Under CEQA, an activity that may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment is called a "project." (Public Resources Code § 21065.) Approval of a contract, grant, or loan may be a "project" under CEQA if the activity being funded may cause a direct physical change or a reasonably foreseeable indirect physical change in the environment. Agencies must comply with CEQA before they approve a "project." This can include preparing a Notice of Exemption or conducting an Initial Study and preparing a Negative Declaration, a Mitigated Negative Declaration, or, if there are significant impacts, an Environmental Impact Report.

The Lead Agency is the public agency that has the greatest responsibility for preparing environmental documents under CEQA, and for carrying out, supervising, or approving a project. Where the award recipient is a public agency, the Lead Agency is typically the recipient. Where the award recipient is a private entity, the Lead Agency is the public agency that has greatest responsibility for supervising or approving the project as a whole.² When issuing contracts, grants or loans, the Energy Commission is typically a "Responsible Agency" under CEQA, which means that it must make its own CEQA findings based on review of the Lead Agency's environmental documents. If the Energy Commission is the only public agency with responsibility for approving the project, then the Energy Commission must act as the Lead Agency and prepare its own environmental documents before approving the project.

This worksheet will help the Energy Commission determine what kind of CEQA review, if any, is necessary before it can approve the award, and which agency will be performing that review as a Lead Agency. Please answer all questions as completely as possible. It may also help you to think through the CEQA process necessary for your proposed project. The Energy Commission may request additional information in order to clarify responses provided on this worksheet.

1. What are the physical aspects of the project? (Check all that apply and provide brief

¹ For a brief summary of the CEQA process, please visit <http://ceres.ca.gov/ceqa/summary.html>.

² 14 C.C.R. §§ 15050, 15051. The Lead Agency typically has general governmental powers (such as a city or county), rather than a single or limited purpose (such as an air pollution control district).



Localized Health Impacts (Attachment 7)

- Complete Attachment 7.
- The CEC requires this information for a Localized Health Impacts report.

Attachment 7
Local Health Impacts Information

Air Quality Guidelines (California Code of Regulations, Title 13, Chapter 8.1, Section 2343(c)(6)(A)) require the Energy Commission to analyze the aggregate locations of the funded projects, analyze the impacts in communities with the most significant exposure to air contaminants or localized air contaminants, or both, including, but not limited to, communities of minority populations or low-income populations, and identify agency outreach to community groups and other affected stakeholders.

This information must be provided for all AB 118 funding categories, including fueling stations, fuel production, feedstock production or procurement, and vehicle or technology component production.

INSTRUCTIONS

Please complete the following information for all sites where work for the proposed project that will require a permit will be done. Attach additional pages if necessary. If the project includes multiple sites, you may submit this information in a table format using the bolded font below as column headers.

PROJECT NAME

APPLICANT'S NAME AND ORGANIZATION

PROJECT SITE(S) DESCRIPTION

Provide the precise street address(es) of the site(s) and a description of existing infrastructure or facilities (if any), surrounding structures, reference to any regional plans or zoning requirements for each location, and its proximity to residences, day care facilities, elder care facilities, medical facilities, and schools.

(E.g., Site 1: 123 Main Street, Grand Terrace, CA, 92313, Vacant lot in a commercially-zoned area. Commercial buildings surround the lot. No residences, daycare facilities, elder care facilities, medical facilities or schools within ¼ mile; Site 2: 321 Beach Street, San Francisco, CA, Existing gasoline/diesel fueling station. Residential area within 200 on South and East ends of project site.)

DEMOGRAPHIC DATA

Provide demographic data at the city or Zip code level for either the project location or the location of the potential health impacts, including:

- o Total population
- o Median education level
- o Unemployment rate
- o Percentage of minorities (by ethnicity)

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REDWDS



Past Performance Form (Attachment 8)

- Applicants must complete Attachment 8 to provide references for:
 1. Agreements with the CEC received by the Applicant in the last 10 years.
 2. The five most recent agreements with other public agencies received by the Applicant within the past 10 years.
- References must include a contact person name and phone number or email address. These persons may be contacted by CEC staff.
- Complete a separate Past Performance Reference Form for each agreement reference.

**Attachment 08
PAST PERFORMANCE REFERENCE FORM**

Provide references for CEC agreements (e.g., contracts, grants, or loans) received by the Applicant in the last 10 years and the 5 most recent agreements with other public agencies within the last 10 years to verify Applicant's past performance. Each reference must include a contact person name and phone number (or email address). If contacted by California Energy Commission staff, references should be able to speak to Applicant's ability to successfully complete projects in a timely manner.

In response to Section III.D.2.12 (Project Narrative – Team Experience and Qualifications) if the team's experience and qualifications includes a specific project(s) under current or prior agreements with public funding (e.g., contract, grant, or loan), the Applicant must also submit a Past Performance Reference Form(s) for the project(s), even if the team member is not the primary Applicant.

Applicants should fill out a separate Past Performance Reference Form for each reference.

Name of Organization	
Address	
Contact Name	
Contact Title	
Contact Phone Number (or Email)	
Title of Project	
Agreement Number or Other Unique Identifier	
(For projects that did not complete (or timely complete) project objectives) Describe the challenges faced, what led to those challenges and indicate whether those challenges were within the Applicant's control.	
Describe any severe audit findings and how they were ultimately addressed and resolved.	

February 2023 Page 1 of 2
Attachment 8 GFO-22-609
REDWDS



GFO 22-609 REDWDS

Application Evaluation and Scoring



How Will My Application Be Evaluated?

Stage 1: Application Screening

- Administrative Screening Criteria (Pass/Fail)
- Technical Screening Criteria (Pass/Fail)

Stage 2: Application Evaluation

- Applicants must pass ALL screening criteria or the application shall be disqualified and eliminated from further evaluation.



Administrative Screening Criteria

Criteria	Pass/Fail
1. The application is received by CEC's Contracts, Grants, and Loans Office by the due date and time specified in the "Key Activities Schedule" in Section I of this solicitation.	Pass or Fail
2. The applicant provides the required authorizations and certifications.	Pass or Fail
3. The applicant has not included a statement that is contrary to the required authorizations and certifications.	Pass or Fail



Technical Screening Criteria

Criteria	Pass/Fail
1. The applicant is an eligible applicant.	Pass or Fail
2. The project is an eligible project.	Pass or Fail
3. The applicant meets the minimum match share requirement.	Pass or Fail
4. The applicant passes the past performance criterion.	Pass or Fail



Past Performance Screening

1. An applicant may be disqualified due to **severe performance issues** characterized by significant negative outcomes under one or more prior or active CEC agreement(s) within the last 10 years.
2. Any applicant that does not have an active or prior agreement equates to no severe performance issues and therefore would pass this screening criteria.



Application Evaluation and Scoring

- The Evaluation Committee applies the scoring scale to the evaluation criteria.
- Evaluation criteria are detailed on pages 44-50.
- Applications must obtain a minimum passing score of **70 percent** to be considered for funding:
 - **Projects with Phase 1 only:** 97.3 out of 139 points
 - **Projects with Phases 1 & 2 :** 113.4 out of 162 points
- Some evaluation criteria are calculated by formula. Some evaluation criteria present opportunities to earn “bonus” points that are not included in the denominator when calculating the final score. Some evaluation criteria apply only to projects proposing Phase 2.



Application Evaluation: Selected highlights (1/7)

3. Collecting Customer Input. Applications will be evaluated on the degree to which the product [10 points]:

- Is capable of collecting a range of customer inputs, preferences, and mobility requirements.
- Uses strategies to automate communication of mobility requirements and minimize manual customer input.
- (For EVSE projects) Will implement ISO 15118 for automated communication of mobility requirements with compatible vehicles.



Application Evaluation: Selected highlights (2/7)

4b. **SCE Dynamic Rates Pilot and Transactive Energy Capability (bonus)** [2 points]. Applications will be evaluated on the degree to which the product is capable of executing transactive energy tenders and participating in the SCE Dynamic Rates pilot.

4c. **Bidirectional Charging Capability (bonus)** [1.5 points]. Applications will be evaluated on the degree to which the product supports bidirectional charging.



Application Evaluation: Selected highlights (3/7)

5. **Customer Value** [11 points]. Applications will be evaluated on the degree to which the Applicant describes:

- How the product creates value for the customer by responding to grid signals.
- How the product presents compensation from responding to grid signals in a meaningful way to the customer
- Any gamification strategies used, if applicable.
- How the product helps customers easily enroll in programs to be compensated for flexibility.



Application Evaluation: Selected highlights (4/7)

7. **Interoperability** [13 points]. Applications will be evaluated on how the product meets the minimum interoperability requirements. Applications will be evaluated on the degree to which the Applicant:

- Describes how CEC funds will help improve interoperability.
- **(For charging station management system products)** Describes compliance with OCPP (including version number; newer versions of OCPP score higher), any plans for certification, and support for easy network migration.
- **(For EVSE products)** Describes compliance with OCPP (including version number; newer versions of OCPP score higher), any plans for certification, and support for easy network migration. Describes connector types supported. Describes software support for ISO 15118, including version and use cases. Describes how CEC funds will help accelerate implementation of ISO 15118-20.
- **(For aggregators, automation service providers, and other products)** Describes how the product functions with multiple EVs and/or EVSE brands. Quantifies and lists the EV and/or EVSE brands supported by the product.



Application Evaluation: Selected highlights (5/7)

8a. **Submetering (bonus)** [2 points]. Applications will be evaluated on the degree to which the product supports submetered billing for EV charging.

9c. **Participation In the SCE Dynamic Rates Pilot (bonus)** [1.5 points]. Applications will be evaluated on the degree to which planned deployments will include customers participating in the SCE Dynamic Rates pilot.

9d. **Deployments With Bidirectional Charging (bonus)** [1.5 points]. Applications will be evaluated on the degree to which planned deployments include bidirectional charging.



Application Evaluation: Selected highlights (6/7)

10a. **Priority Community Engagement, Deployment, and Benefits** [11 points]. Applications will be evaluated on the degree to which the Applicant:

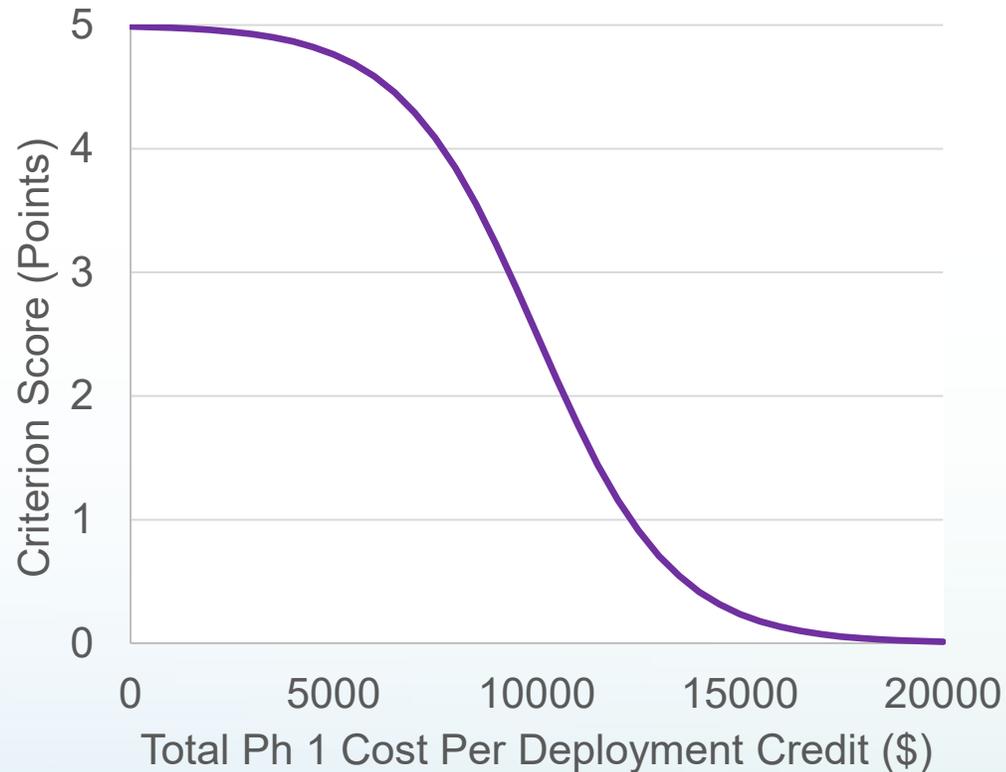
- Describes plans to ensure at least 50 percent of deployments are located within a disadvantaged or low-income community.
- Describes plans to ensure context-appropriate outreach, education, and engagement with priority communities.
- Describes plans to collaborate with specific community-based organizations for outreach, education, engagement, and installation in priority communities.

10b. **Community-Based Organization Involvement** [2 points]. Applications will be evaluated on the degree to which the project includes collaboration with one or more community-based organizations.



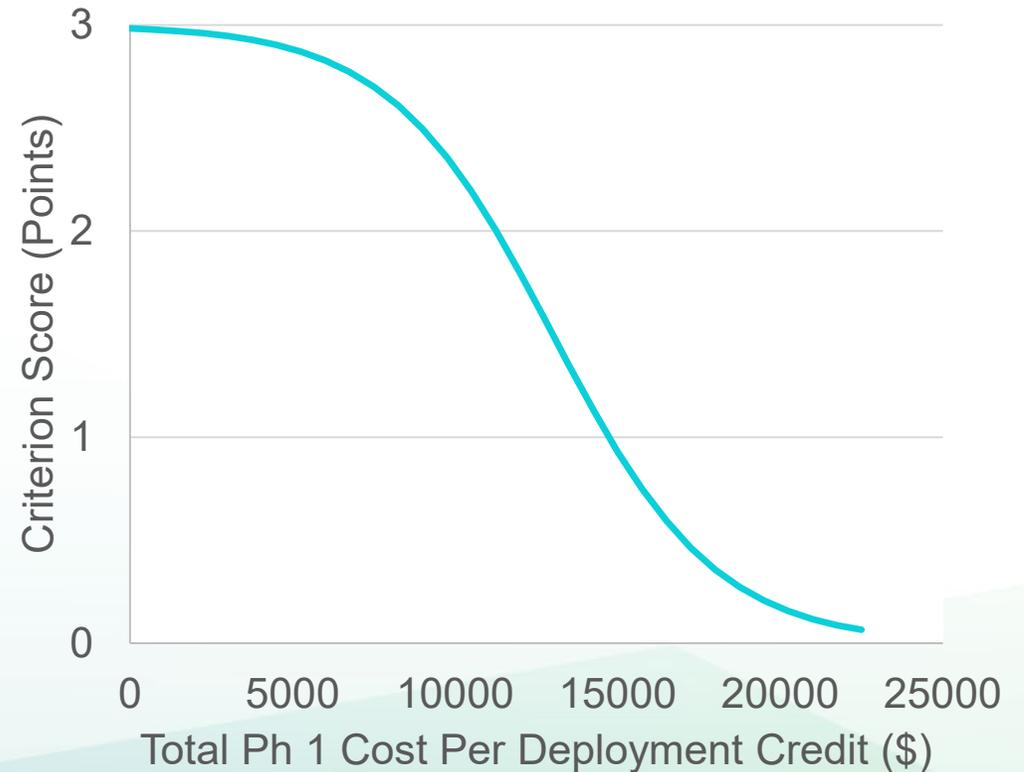
Application Evaluation: Selected highlights (7/7)

13b. Phase 1 Deployment Cost Factor



13c. Phase 1 Hardware Cost Factor

** No points if not deploying new charging hardware.*





GFO 22-609 REDWDS

Application Submittal



GFO Submission Requirements (Electronic)

The method of delivery is the CEC's Grant Solicitation System (GSS), available at: <https://gss.energy.ca.gov>.

- First time users must register as a new user.
- Electronic files must be in Microsoft Word and Excel formats, unless originally provided in the solicitation in another format.
- Until further notice, any requirement in CEC solicitations to provide a signature is waived. In the GSS, checking the “I Agree” box and clicking the “I Agree & Submit” button provides the required authorizations and certifications.
 - Notice on CEC’s waiver of the signature requirement appears here: <https://www.energy.ca.gov/funding-opportunities/solicitations>



GFO Submission

Submit applications early!

The GSS system will stop accepting application documents promptly at the deadline of 11:59 p.m. on Friday **May 26, 2023**.

Applications in the process of being submitted prior to the deadline will NOT be accepted after the deadline.



GFO Submission Resources

- [How to Apply](https://www.energy.ca.gov/media/1654) via the Grant Solicitation System: <https://www.energy.ca.gov/media/1654>.
- This presentation explains how to:
 - Create an account
 - Create a new application
 - Select the correct solicitation
 - Upload application files
 - Edit application
 - Review and submit
- Tips and Frequently Asked Questions

A screenshot of the California Energy Commission's Grants Solicitation System login page. The page features a navigation bar with the CA.GOV logo, the California Energy Commission logo, and a menu with links for Home, About Us, Analysis & Stats, Efficiency, Funding, Power Plants, Renewables, Research, and Transportation. The main heading is "Grants Solicitation System". Below this is a "Log In" form with fields for "Email" (containing "Your Email Address") and "Password" (containing "Your Password"). There is a "Sign In" button and a link for "Forgot your password?". Below the form is a link for "Don't have an account?" and a "Register as a New User" button.

CA.GOV CALIFORNIA ENERGY COMMISSION CA.gov | Contact Us | Accessibility | Quick Links

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Grants Solicitation System

Log In

Email

Password

[Forgot your password?](#)

[Don't have an account?](#)



Key Dates

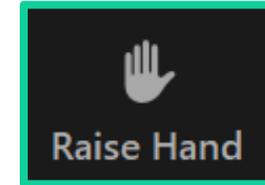
ACTIVITY	ACTION DATE
Pre-Application Workshop	March 23, 2023
Deadline for Written Questions	March 29, 2023
Anticipated Distribution of Questions/Answers	Week of April 17, 2023
Deadline to Submit Applications by 11:59 p.m.	Friday May 26, 2023
Anticipated Notice of Proposed Awards Posting	July 2023
Anticipated CEC Business Meeting	October 2023 and later
Phase 1 Project Completion Deadline	March 31, 2026
Phase 2 Project Completion Deadline	March 31, 2029



Thanks! Last chance for spoken Q&A

Questions? Use Q&A box or the following:

- Phone: *9 to raise/lower hand, *6 to unmute/mute
- Zoom: Click **Raise Hand** and we will enable your audio



CEC staff **strongly recommends** submitting any questions during the workshop as formal written questions:

Angela Hockaday, Commission Agreement Officer

Angela.Hockaday@energy.ca.gov

Subject: GFO-22-609 REDWDS

Submission deadline: **Wednesday, March 29, 2023 by 5:00 PM**

Anticipated distribution of CEC response: Week of April 17, 2023