

<b>DOCKETED</b>	
<b>Docket Number:</b>	21-TRAN-04
<b>Project Title:</b>	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)
<b>TN #:</b>	251104
<b>Document Title:</b>	Presentation - EnergIIZE EV Jump Start Funding Year 2 Application
<b>Description:</b>	<p>EnergIIZE Commercial Vehicles Project EV Jump Start Funding Year 2 Application Process Workshop slide deck from June 23, 2023 presentation.</p> <p>A recording of the workshop is viewable at the link below.  <a href="https://www.youtube.com/watch?v=ieORldIZpSs">https://www.youtube.com/watch?v=ieORldIZpSs</a></p>
<b>Filer:</b>	CALSTART
<b>Organization:</b>	CALSTART
<b>Submitter Role:</b>	Public
<b>Submission Date:</b>	7/19/2023 3:31:30 PM
<b>Docketed Date:</b>	7/19/2023



## **EnergiZE Workshop**

EV Jump Start Funding Year 2 Application  
Process

June 23, 2023

# EnergIIZE Commercial Vehicles

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

**Jamaica Gentry**  
*California  
Energy Commission  
(CEC) Commissioning  
Agreement Manager  
(CAM)*

**Diana Friedrich**  
*CEC CAM*

**David Chow**  
*Vice President, COO*

**Alyssa Haerle**  
*Director of Infrastructure  
Incentive Administration*

**Ralph Trout**  
*Deputy Director*

**Falisha Lucas**  
*Lead Project Manager*

**Tesi Bravo**  
*Lead Project Manager*

**Eric Canales-  
Ramirez**  
*Research Assistant  
Intern*

**Amanda Le**  
*Lead Project Manager*

**Alberto Santos-  
Davidson**  
*Project Manager*

**Erin Wimberly**  
*Project Manager*

**Kelly Ratchinsky**  
*Project Manager*

**Sydney Frazier-  
Flores**  
*Engagement Coordinator*

**Aidan Anthony**  
*Project Coordinator*

**Eddy Huang**  
*Director*

**Tom Rauls**  
*Technical Advisor*

**Wen-Han Liu**  
*Project Manager*

**Priscilla Barragan**  
*Project Manager*

**Jalyn Collins**  
*Environmental Scientist*

**Saul Loza**  
*Environmental Scientist*

**Thanh Nguyen**  
*Environmental Scientist*

**Grecia Maya**  
*Environmental Scientist*



# Zoom Logistics

**Webinar URL:** [https://calstart-org.zoom.us/webinar/register/WN\\_FX8kYiCoTamzoTRPQIEaE](https://calstart-org.zoom.us/webinar/register/WN_FX8kYiCoTamzoTRPQIEaE)

**Webinar ID:** 894 6986 1532

**Passcode:** 983302

**Mobile:**

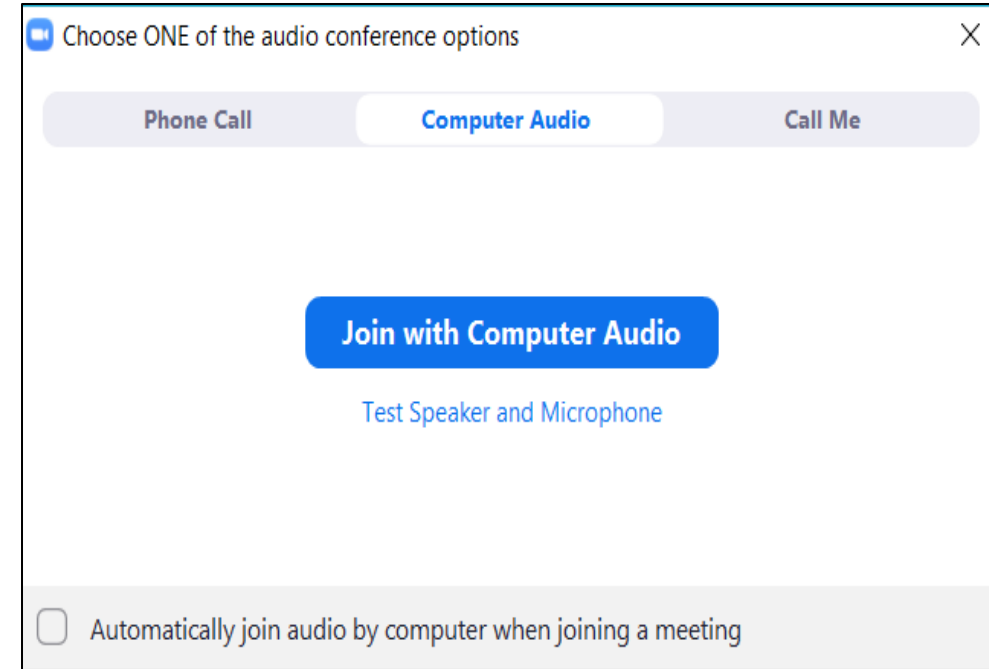
+16694449171,,89469861532# US

+16699006833,,89469861532# US (San Jose)

**Dial by your location:**

US: +1 669 444 9171 or  
877 853 5247 (Toll Free) or  
888 788 0099 (Toll Free)

If you dial-in from a phone, use the meeting ID and passcode from invite



All participants (web and dial-in) are automatically in listen-only mode.

All participants will be unable to share their video.

If you have questions, you can use the Q&A function.

# Agenda

## 1 Overview

## 2 Walkthrough of EnerglIZE EV Jump Start Funding Application Process

1. *Submit EnerglIZE Application*
  1. *Changes to qualitative questions and scoring rubric*
2. *Provide Supporting Documents*
3. *Permitting and Construction*
4. *Commission Project*

## 3 Q&A

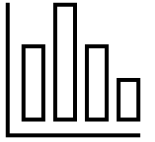


# Overview



EV Jump Start Funding Lane  
Opening July 19, 2023

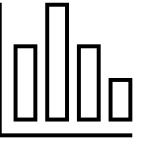
# Poll #1



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

- A. Equipment Vendor
- B. Application Partner
- C. Installation Partner
- D. Fleet Vehicle Operator
- E. Site Owner
- F. Other

# Poll #2



## Have you previously applied to an Energize funding lane?

- A. Yes, to EV Fast Track in 2022
- B. Yes, to EV Fast Track in 2023
- C. Yes, to Hydrogen in 2022
- D. Yes, to Hydrogen in 2023
- E. Yes, to EV Jump Start 2022
- F. Yes, to Public Charging 2022
- G. Started an app but did not submit
- H. No

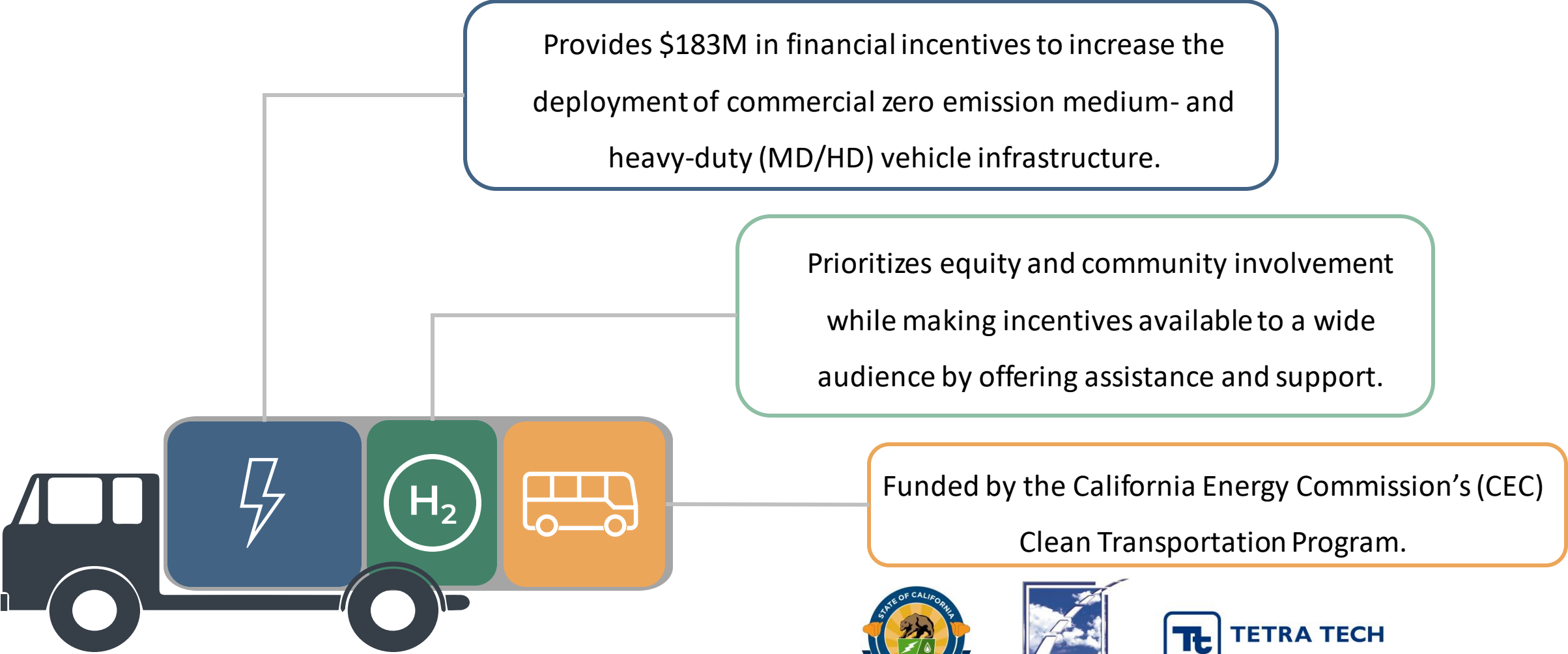
## Have you applied to HVIP (Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project) funding?

- A. Yes
- B. No



# Overview of EnergIIZE

## Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles



# EV Jump Start Funding Lane

EV Jump Start is one of four funding lanes under EnergIIZE. The application process is competitive, and applications are scored on criteria demonstrating project readiness, cost effectiveness, and community benefit.



## When can I apply?

- Funding window open from 9am July 19 through 5pm (PT) August 18, 2023.



## What is covered?

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

## Who can apply?

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



## I need more help!

- For questions or to request technical assistance, please contact [infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org).





# Eligibility



EV Jump Start Applicants will need to meet specific equity eligibility criteria

# EV Jump Start Fleet Eligibility

If any of the following apply to the project, it is eligible for EV Jump Start:

- Tribe or tribe-serving entity.
- Small business as identified in the California State Legislative Code.
- Certified Minority Business Enterprise, Woman-Owned Small Business, Veteran-Owned Small Business, or LGBT-Owned Small Business.
- Transit system with at least 50% of applicable routes or coverage areas within a designated Disadvantaged Community [1] or Low-Income Community [2].
- School district in a designated Disadvantaged Community [1] or Low-Income Community [2], or serving economically disadvantaged students.
- Non-profit organization.
- Recharging infrastructure is in a designated Disadvantaged Community [1] or Low-Income Community [2].

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

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

# EV Jump Start Applicant Eligibility

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

## **A Commercial Fleet or Vehicle Operator**

**OR**

## **An Application Partner**

- Can be a business, organization, or individual.
  - Is responsible for operating one or more Medium- or Heavy-Duty Zero Emissions Vehicles (Class 2b and above) in the State of California.
  - One application associated with the parent company's Tax ID per funding wave.
- May apply on behalf of an eligible commercial fleet or vehicle operator.
  - Must be vetted by EnergIIZE staff and complete the [Project Partner Application](#).
  - May submit multiple applications; they may not submit multiple applications for the same fleet or the same site address.
  - Must comply with Terms and Conditions with special attention to equipment ownership.

# EV Jump Start Equipment Eligibility

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



# Step 1: Submit Application



EV Jump Start Funding Lane

# EV Jump Start: Application Checklist



- 1 Online EnerGIIZE Application for EV Jump Start (Incentive Processing Center, IPC)
- 2 Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation such as Letter of Intent (see Implementation Manual)
- 3 Acknowledge Sample EnerGIIZE Terms and Conditions
- 4 Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.



# EV Jump Start Funding: Application Checklist (Continued)



- 5 Jump Start Certification Form (required)
- 6 Signed vehicle commitment agreement
- 7 Answers to qualitative questions (if seeking more than \$150,000 in incentives).

# Reminder: Application Eligibility

- One site per application and one application per participant (participants tracked by recipient TIN).
- Repeat Applicants: Participants previously awarded EnerglIZE funding in any lane must show proof of Site Commissioning to be eligible for another award.
- Recipient: Incurred Costs must match the Recipient TIN on invoiced eligible costs
- Not all Readiness Project Site questions in the IPC will be used for scoring
- Applicant must be in good standing with the California Secretary of State (if required to register)

# Application Sandbox

- The EnerglIZE application process includes a sandbox testing environment
- The goal of the application sandbox is to create transparency, foster user-friendliness, and give all applicants an opportunity to interact with our Incentive Processing Center before applying
- **NOTE : The application sandbox will not save or store any data. The application fields will not be stored and will not auto-populate when the lane opening occurs. The sandbox is only intended to familiarize participants with the Incentive Processing Center (IPC).**

# Step 1: Submit Application

## *Infrastructure Processing Center (IPC)*

### What's on the IPC?

- Application Form - Fields to indicate if you are a:
  - fleet applying on behalf of your organization, or
  - an Application Partner applying on behalf of a fleet, or
- Site Equipment Manifest
- All subsequent documents listed will be uploaded to the IPC

### What You Need to Complete It:

- ✓ Contact Phone and Email of Recipient, Primary Application Contact, and Job Site Contact
- ✓ Primary Contact Phone and Email of Project Partner (Previously Approved or Preferred Vendor)
- ✓ Address of Infrastructure Project
- ✓ Make, Size (kg), and Anticipated Quantity of Eligible Equipment Nozzles to be Installed
- ✓ Project detail for intended service category, vehicle type and class

# Step 1: Submit Application

## *Proof of Cost Share – Online Form and Supporting Documents*

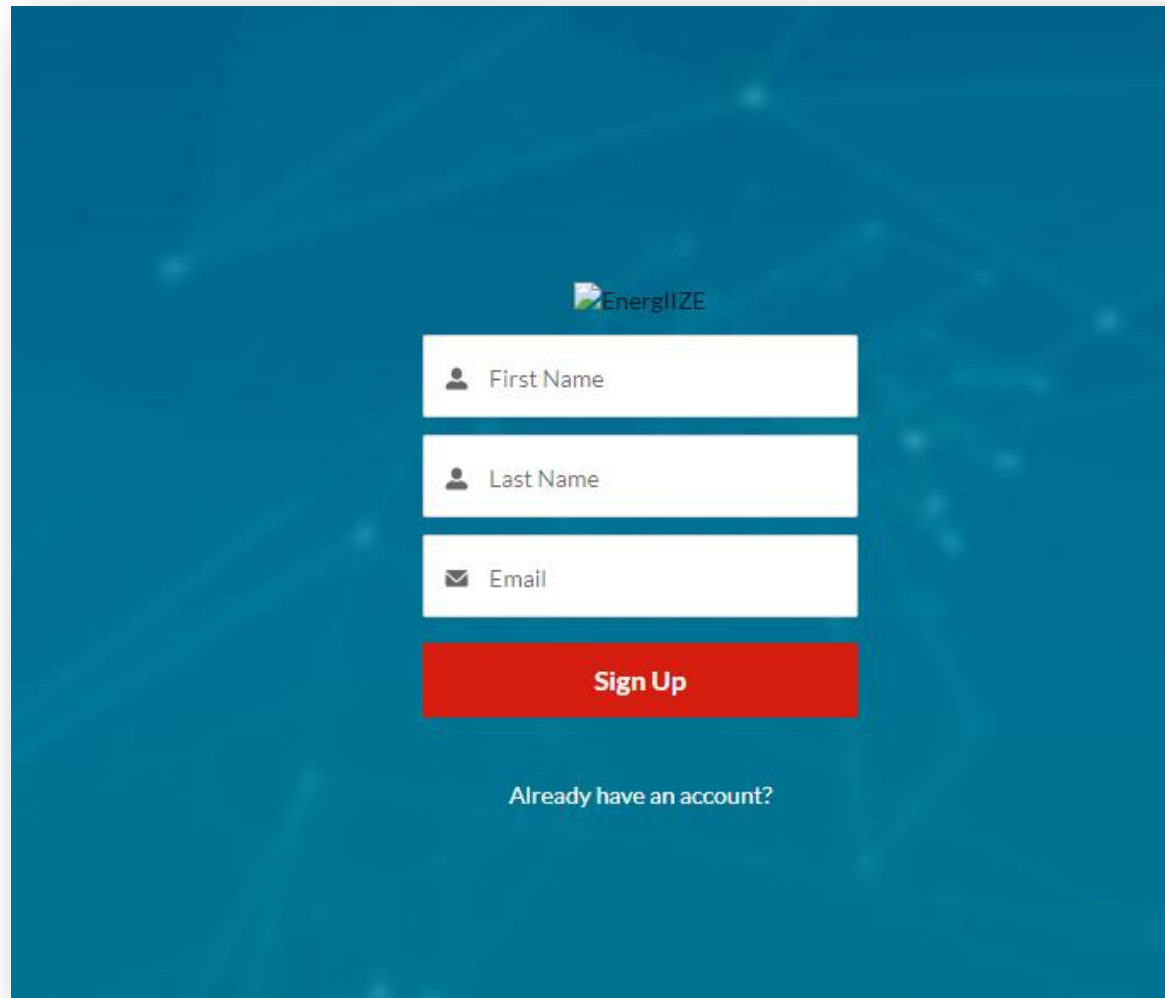
### What Information Needs to be Provided?

- Disclosure of all public funding sources awarded.
- Demonstrated proof-of-cost coverage for any non-incentivized project costs.
- The sum of make-ready funding, self-contributions, other external funding sources, and potential EnerglIZE incentive funds.

### What You Need to Complete It:

- ✓ Notices of proposed award.
- ✓ Notice of grant award.
- ✓ Other official documentation indicating an award of funding.
- ✓ **Note: EnerglIZE funding cannot be stacked with other active California Energy Commission funding programs. But you can stack with other programs!**

# Create User Account



The screenshot shows a user account creation form on a blue background. At the top center is the EnergIIZE logo. Below it are three white input fields: 'First Name', 'Last Name', and 'Email', each with a small icon on the left. A red 'Sign Up' button is positioned below the fields. At the bottom, there is a link that says 'Already have an account?'.

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

File Message Help

Ignore Delete Archive Reply Reply All Forward Meeting IM More

Junk Delete

Share to Teams

Quick Steps: Mavenlink Billing, Team Email, Reply & Delete, To Manager, Done, Create New

Move, Rules, Actions

Assign Policy, Mark Unread, Categorize, Follow Up

Find, Related, Select, Editing

Read Aloud, Immersive Reader, Translate, Zoom, Send to OneNote, Reply Meeting

Sandbox: Welcome to EnergIIZE Incentive Processing Center

EnergIIZE Application Portal <infrastructure@calstart.org> (EnergIIZE Application Portal via ar42cukfyhxv.7z-xrmpea4.usa2s.bnc.sandbox.salesforce.com)  
To Tesi Bravo

We could not verify the identity of the sender. Click here to learn more.  
The actual sender of this message is different than the normal sender. Click here to learn more.

Start your reply all with: Thank you! Thank you so much! I accept! Feedback

Hi Tesi,

Welcome to EnergIIZE Incentive Processing Center! To get started with the IPC, go to [https://calstart3--demo.sandbox.my.site.com/apply/login?c=ECKEPOWCFn3NWYv\\_lynAYGHf7l.ju2DsBd5392vIOUJ7CMpMgM02Dy0.TG5wwwaw2T32mkqAB83d\\_LH\\_NaCt2Sm7RRSVYUXhp59hCjS3tWaEbjqFmuj60KqV8daAtv7E86U6ZuAP\\_xtLFQjEKE9VIT6il8KI1KKfhPyeqpR1HpeecKoRSbm8tk0Cr77yHuKGLAO7RXVQ5](https://calstart3--demo.sandbox.my.site.com/apply/login?c=ECKEPOWCFn3NWYv_lynAYGHf7l.ju2DsBd5392vIOUJ7CMpMgM02Dy0.TG5wwwaw2T32mkqAB83d_LH_NaCt2Sm7RRSVYUXhp59hCjS3tWaEbjqFmuj60KqV8daAtv7E86U6ZuAP_xtLFQjEKE9VIT6il8KI1KKfhPyeqpR1HpeecKoRSbm8tk0Cr77yHuKGLAO7RXVQ5)

Username: [tbravo@calstart.org](mailto:tbravo@calstart.org)

Thanks,  
EnergIIZE Team

# Incentive Processing Center Screenshot

# Incentive Processing Center Screenshot

Search...

Home Applications (Step 1) Projects (Steps 2-6)

Welcome to EnergIIZE Incentive Processing Center!

1. Login to the Incentive Processing Center using the "Login" button in the top-right corner.
2. If you do not have a user created in the system, select the "Create a User" link at the bottom-right of the Login page.
3. Click the "Submit EnergIIZE Application Materials" to start your EnergIIZE application.

[Start Hydrogen 2023 Application](#)

Please note starting February 3, 2023, there is a sandbox Incentive Processing Center portal (<https://calstart3--demo.sandbox.mysite.com/apply/s/>) where potential EnergIIZE Commercial Vehicles project EV Fast Track lane applicants may create an account and familiarize themselves with the application portal in a test environment. Applicants will not be using the sandbox IPC to submit EV Fast Track online applications.

Application  
App-000182

Status: Pending Submittal  
Total Project Cost: \$750,000.00

Instructions **Readiness Questions** Basic Details Recipient Project Partner Project Site

- Does the project site have any open AHJ violations? Found using link in help text. ⓘ
- Is the recipient TIN required to register with the State of California (SOS)? ⓘ
- Is the recipient TIN in good standing with the State of California?
- Does the project require CEQA Analysis?
- Is the project zoned to accept H2 Fueling?
- Does the project plan meet all relevant regulatory code?
- Has the project hired a Fire Protection Engineer?





Q&A

# EV Jump Start: Qualitative Question 1



**What measures or project elements are you incorporating to insure effective and efficient management of the charging equipment?**

Successful responses may include:

- Explanation of the project's plan to maintain high infrastructure uptime (ex: 24/7 service call center, preventative maintenance plans, remote monitoring systems).
- Project's plan to maximize infrastructure utilization over time, if applicable (ex: public access, business to business, shared access, CaaS)

# EV Jump Start Qualitative Question 2

**Qualitative Question #2- What evidence can you provide that the project is supported by the surrounding communities?**



Successful responses may include:

- Project Team's methods to engage the community.
- Project's ability to strengthen the community.
- Letters of Support from community-based organizations, appointed or elected officials
  - Neighborhood associations, environmental justice groups, faith-based organizations, parent-teacher associations.
- Decision-making members of the Applicant Team who are also members of a community group, Tribal government, or other entity that already represents local residents.

# EV Jump Start Qualitative Question 3



## Qualitative Question #3 - What evidence can you provide that the project will contribute to local economic benefits?

Successful responses may include:

- Project plans to engage a workforce inclusive of local labor, or of [Disadvantaged Business Enterprises](#).
  - If the proposed community benefits include partnerships with local entities (i.e. community college, nonprofit, etc.,) include letters of support.
- Project's plan to locally source supplies and services (ex: % domestic components in the end-product delivered, partnerships with local businesses for parts and maintenance).

For large projects, \$150,000 and greater:

For the three qualitative questions below, please read through and address each bullet point listed underneath. You are encouraged to submit supporting materials and photos, which may be used to determine scoring.

20

4. **Qualitative Question #1-** In a Word document, please note (500-word limit) If throughput is equal to the flow of vehicles at the project site, what is the estimated throughput of vehicles at this project site? Restated, how many vehicles do you plan to service per day? How was this estimated? Explain how the project site will maximize the infrastructure utilization over time (i.e., maintenance plans to maintain high infrastructure uptime)?

20

5. **Qualitative Question #2-** In a Word document, please demonstrate local community buy-in and support. (500-word limit)
- What steps have been taken to achieve community engagement?
    - Describe the process for receiving community support and buy-in. Please provide examples of community outreach and engagement activities that you led or participated in.
  - How was feedback collected and incorporated?
  - Please note any letters of support that you have received for the proposed Project.
    - Applicants should include letters of support for the proposed Project from community organizations representing residents in the area where the Project is proposed.
    - Letters of support from appointed or elected officials are allowed, but letters from community-based organizations (e.g. neighborhood associations, environmental justice groups, faith-based organizations, Parent Teacher Associations, etc.) will be given greater weight in scoring.
  - Describe any members of the Applicant Team (refer to [Key Terms](#)) who are also member of a community group, Tribal government, or other entity that already represents local residents.

## Qualitative Questions Screenshot

# Rubric Screenshot

For the EnergIIZE Commercial Vehicles (Energy Infrastructure Incentives for Zero- Emission Commercial Vehicles) Project's competitive funding lanes (EV Jump Start, Hydrogen, and EV Public Charging), Applicants will be evaluated on items 1-3 below.

For applicants seeking **more than \$150,000** in incentives for competitive lanes, Applicants will be evaluated on items 1-6 below upon the close of the application windows. Please monitor [www.Energiize.org](http://www.Energiize.org) for opening and closing dates of each funding lane.

All **Hydrogen** applicants will be evaluated on items 7-9 as well. Applicants participating during funding lanes other than Hydrogen will not be evaluated on items 7-9.

All qualitative question responses may be combined into one Word document.

Applicants required to register with the State of California that are not in good standing according to The California Business Search provided by the California Secretary of State<sup>21</sup> will be disqualified.

All applications must obtain a **minimum of 50 points** to be recommended for funding. All Projects must submit the required application documents. For competitive lanes, funding will be awarded to Projects in ranked order until all available funds in each wave are exhausted. Conditional awards may be offered that are less than the requested amount. Tie scores will be broken as needed by random lottery.

## Required Section

Criteria	Total Possible Points
<b>1. Submission of all required application documents required in Step 1.</b>	50
<ul style="list-style-type: none"><li><b>For All Lanes:</b><ul style="list-style-type: none"><li>o EnergIIZE Application Form</li><li>o Proof of cost share</li><li>o Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation (see Section 8.1).</li><li>o Acknowledge Sample EnergIIZE Terms and Conditions</li><li>o Answers to qualitative questions (if seeking more than \$150,000 in incentives in competitive lanes)</li><li>o Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.</li></ul></li></ul>	

**Qualitative Question #1 – Maximizing MD/HD Infrastructure Utilization- Total Max Score = 20 points**

**Rubric Screenshot**

Primary Components (bullet points)	Purpose	Criteria	Max Score	Effective Weighting
Description of how MD/HD ZEVs will be serviced by proposed infrastructure.	Energilize intends to fund MD/HD infrastructure; please briefly describe how your project meets that criteria.	<ul style="list-style-type: none"> <li>● 10 - Project has a clearly established MD/HD nature of vehicles being served by infrastructure.</li> <li>● 0 - Project has NOT clearly established MD/HD nature of vehicles being served by infrastructure.</li> </ul>	10	50%
Description of how infrastructure use will be maximized over time, including maintenance and service plans to avoid broken infrastructure.	Energilize intends to fund highly utilized infrastructure and seeks to avoid infrastructure that will be out of commission before the end of the product's life.	<ul style="list-style-type: none"> <li>● 10 - Project has well defined maintenance plan, extended product warranties, and engages with contractors who will focus on quality work performed.</li> <li>● 5 – Project does not adequately describe maintenance plans and/or little description of quality of work to be performed.</li> <li>● 0 – Maintenance plans are absent and there is little to no mention of quality and longevity in project description.</li> </ul>	10	50%

# Step 1: Submit Application

## *Responses to Qualitative Questions from Rubric (IPC)*

### How to set-up quality response:

- Create in Word Document, then paste into IPC
- Carefully read the question
- Break out each element of the rubric
- Respond to each element
- Include supporting evidence for your response

### What You Need to Complete It:

- ✓ Plan for maintaining site.
  - ✓ [Resource: EV Infrastructure Project Planning Checklist | US Department of Transportation](#)
- ✓ Access to existing community plans, or an engagement plan of your own
  - ✓ [Resource: California Climate Action Portal \(CAP-Map\)](#)
- ✓ Evidence that supports claims of community benefit.
  - ✓ Letters of support or other evidence of partnership.





# Step 1: Other Application Documents



EV Jump Start Funding Lane

# Step 1: Submit Application

## *Site Verification Form*

### What's Inside the Document?

- Fields for EnerglIZE applicant
- Fields for Property Owner

### What You Need to Complete It:

- ✓ If applicant does not own the property complete Site Verification Form:
  - ✓ Organization Name.
  - ✓ Applicant ID.
  - ✓ Installation Site Address.
  - ✓ Signatures verifying the installation work is authorized by the Property Owner and the EnerglIZE applicant.
- ✓ If applicant owns the property:
  - ✓ Provide evidence of this (e.g. Deed).
- ✓ Note: If new or upgraded equipment is provided by the utility, then proof of easement may be required.

## Site Verification Form

This form establishes that the installation work is authorized by the owner of the real property (Property Owner). The purpose of this form is to establish that the program applicant or participant is able and authorized to make alterations and/or improvements to necessary for infrastructure to be constructed and commissioned. Please contact us if you are unable to obtain the proper signature(s) for this Site Verification Form, for any reason.

**Please note:** This form is required by all Applicants. Where Applicants are the Property Owners, they must attach proof ownership in attachment to this form. Applicants who are not the Property Owners may provide additional documentation in attachment to this form in lieu of Property Owner signature only as outlined in Section 8.1 [Step 1: Submit Application](#).

# Site Verification Form

---

<i>EnergIIZE Applicant. Please complete as follows:</i>	
Organization Name:	Enter Applicant/Org. Name
Installation Site Address:	Enter Address
City: Enter City State: Enter State Zip Code: Enter Zip Code	
Applicant hereby represents and warrants to EnergIIZE Staff: (i) that all the foregoing information is true and correct; and (ii) that the undersigned has been duly authorized by Applicant to execute and submit this Site Verification Form. Applicant acknowledges and agrees that EnergIIZE staff is relying on Applicant's foregoing certifications in reviewing and approving of Applicant's application.	
Signature of Authorized Applicant or Representative of Applicant:	
Print Name: Print Name	Title: Click or tap here to enter text.
Date:	Click or tap to enter a date.

<i>PROPERTY OWNER. Please complete as follows:</i>	
Provide the name of the company, city, trust, organization or individual that owns the property where the project site will be located ("Owner").	
Property Owner Name:	Print Name
The undersigned, on behalf of <a href="#">Click or tap here to enter text.</a> ("Owner"), hereby represents and warrants to EnergIIZE staff (i) that Owner is the property Owner located at <a href="#">Click or tap here to enter text.</a> ("Property") where infrastructure will be installed; (ii) that Owner has consented to EnergIIZE Applicant's/participant's installation of certain EV charging station equipment and/or hydrogen fuel cell refueling equipment at the property; and (iii) that the undersigned has been duly authorized to execute and submit this Site Verification Form to EnergIIZE staff. Owner acknowledges and agrees that EnergIIZE staff is relying on Owner's foregoing certifications in reviewing and approving of Applicant's application.	
Signature of Property Owner or	

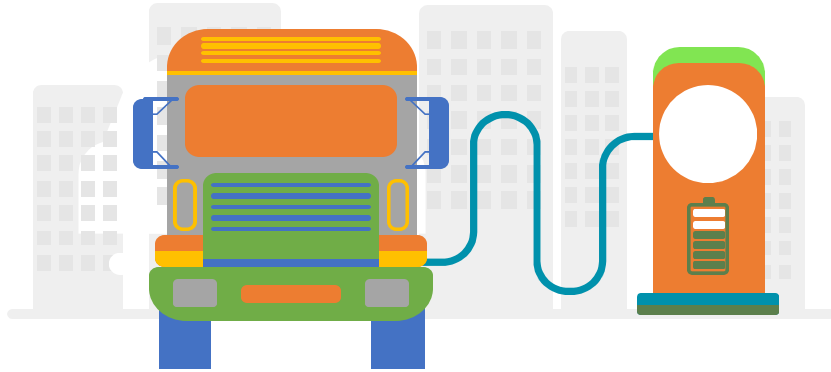
# Step 1: Submit Application

## *Terms and Conditions – The Fine Print*



### Time Commitments

- Operate this equipment in California for a minimum of five (5) years from the date of commissioning.
- Keep written records of the equipment purchased for a minimum of three (3) years after final payment received.
- Complete the semi-annual usage survey and questionnaire for three years after the commissioning of my project.
- Retain all project reimbursement records for a minimum of three (3) years after the final payment has been received or after the agreement term, whichever is later, unless otherwise specified.



# Step 1: Submit Application

## *Terms and Conditions – The Fine Print*



### Equipment/Insurance Terms

- Carry Worker's Compensation Insurance for all its employees who will be engaged in the performance of this Agreement and must provide satisfactory evidence
- If Applicant is self-insured for worker's compensation, it hereby warrants such self-insurance is permissible under the laws of the State of California and must provide satisfactory evidence
- Equipment will be utilized for the charging or fueling of Class 2b – Class 8 commercial vehicles, operated and maintained as recommended by the manufacturer



### Other Terms

- All projects receiving funds through an EnergIIZE incentive comply with the payment of prevailing wages;
- Failure to comply with the terms of this agreement may result in withholding of future payments or repayment of incentive funds received to EnergIIZE
- Must be acknowledged by Applicant in Step 1
- EnergIIZE Agreement (including Terms and Conditions) will need to be acknowledged in Step 1 and signed in Step 2

# Step 1: Submit Application

## *Jump Start Certification Form*

### What's Inside the Document?

- Eligible Jump Start Categories.
- Methods for self-certification.

### What You Need to Complete It:

- ✓ Applicable documentation based on Eligible Category Selected
- ✓ Must meet at least one of the criteria
- ✓ In some cases, a narrative and/or follow up for more information may be required

# Jump Start Certification Form

---

## Appendix G – Jump Start Certification Form

Applicants must demonstrate their status as an equity Applicant if they are applying for additional incentives (see [Section 5.3 Applicants Meeting Jump Start Criteria](#)). Where applicable, use one of the approved methods of self-certification listed.

Check the box next to the applicable category(ies) and attach the requested documentation. If the category selected has multiple options for documentation, please check the box of the option for which you will be providing documentation. Disadvantaged Communities (DAC) and Low-Income Communities (LIC) are defined within [Key Terms](#). Technical assistance is available to Applicants who need support in putting together the required documentation.

I certify that the Commercial Fleet (or Applicant Team for funding lanes other than Jump Start) meet one of the following criteria:

- A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities.** Attached is documentation of one of the following:
  - If the Applicant is a Federally Recognized Tribal Government listed under the list of Indian Entities Recognized by and Eligible to Receive Services From the United States Bureau of Indian Affairs, check this box – no attachment is required.
  - If the Applicant is not a Federally Recognized Tribal Government, the Applicant's 501©(3) Determination Letter from the Internal Revenue Service (IRS).
- A small business as recognized by the California State Legislative Code**, Section 14837(d) meaning annual revenue less than \$15 million per year. Attached is documentation of the Applicant's Small Business (SB) certification by the California Department of General Services, Procurement Division (DGS-PD), Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS). Certification must be current.
- A Certified Minority Business Enterprise** as defined by California Public Contract Code, Article 12; Woman-Owned Small Business; or a Veteran-Owned Small Business; or a LGBT-Owned Small Business. Attached is documentation of one of the following:

# Step 1: Submit Application

*Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.*

## What's Inside the Document?

- May include copy of Request for New Service.
  - Steps to Request New Service.
  - Guidelines and Restrictions.
- May include proof of participation in available utility programs for make-ready (not required).
  - Customer Agreement Form signed by site operator.

## What You Need to Complete It:

- ✓ Copy of Request for New Service.
  - ✓ Contact your local utility company to confirm what is needed for new service.
  - ✓ Copy of email correspondence can satisfy this step.
  - ✓ Review local utility resources and guides.
  - ✓ Consult with a licensed electrician to determine whether your panel is appropriately rated for the increased load.



# Step 1: Submit Application

## *Vehicle Commitment Agreement*

### What's Inside the Document?

- Commercial Fleet information
- Medium- and heavy-duty (MD/HD) zero-emission vehicle (ZEV) information
- Signature Field

### What You Need to Complete It:

- ✓ Fleet Point of Contact Name and Contact Info
- ✓ Fleet Tax ID
- ✓ Installation Site Address
- ✓ Vehicle Make, Model, Quantity, Cost
- ✓ Expected Date of Purchase
- ✓ Signature of Commercial Fleet Operator

# Appendix F – Vehicle Commitment Agreement

## EnergIIZE MDHD Vehicle Commitment Agreement

# Vehicle Commitment Agreement Form

The purpose of this agreement is to document the Applicant's commitment to purchase a qualifying vehicle. A qualifying vehicle is defined as any battery electric or hydrogen fuel cell vehicle Class 2B with a gross vehicle weight rating (GVWR) of 8,501 pounds and greater according to the U.S. Environmental Protection Agency (EPA). This form applies to EV Jump Start applicants.

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

### MDHD Vehicle Information (Please fill in the required information below.)

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

# EnergIIZE Doesn't Seem Like a Good Fit?

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

Advanced Vehicle Technology and Infrastructure Planning Grants >

## Funding Finder Tool

The Funding Finder Tool is designed to help stakeholders search and filter for Medium-and-Heavy-Duty Alternative Fuel Vehicle and infrastructure programs in the state of California. Start by filtering results by ZIP Code then filter based on the other criteria you desire. Please note that for the most accurate and up to date information about each program, you should visit the website and/or speak with the agency directly.

Search for Funds

51 of 51 programs displayed.

Organization(s):	Santa Barbara County APCD	Vehicle Types:	Infrastructure, Transit, School, Off-Road, Truck, Bus, Other Vehicle Type
Program:	Clean Air Grants (Various)	Technology:	Hydrogen, Battery Electric, Hybrid, CNG/Low Nox, Other Fuel Technology
Funding:	See website for details	<b>Total Program Fund:</b>	<b>TBD</b> <span>Show More +</span>
Organization(s):	California Energy Commission (CEC) and California Air Resources Board (CARB)	Vehicle Types:	Infrastructure, Other Vehicle Type
Program:	Clean Mobility Options	Technology:	Hydrogen, Battery Electric, Hybrid, CNG/Low Nox, Other Fuel Technology
Funding:	Varies	<b>Total Program Fund:</b>	<b>TBD</b> <span>Show More +</span>

Search filters: ZIP Code, County, Technology, Vehicle Type, Infrastructure, Private / Public Fleet, Scrapage

# EV Jump Start: Application Checklist



- 1 Online EnerGIIZE Application for EV Jump Start (Incentive Processing Center, IPC)
- 2 Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation such as Letter of Intent (see Implementation Manual)
- 3 Acknowledge Sample EnerGIIZE Terms and Conditions
- 4 Confirmation of Request for Service from the local utility, notice that project site is being assessed for energy load capacity, or that applicant is coordinating with utility.

# EV Jump Start Funding: Application Checklist (Continued)



- 5 Jump Start Certification Form (required)
- 6 Signed vehicle commitment agreement
- 7 Answers to qualitative questions (if seeking more than \$150,000 in incentives).

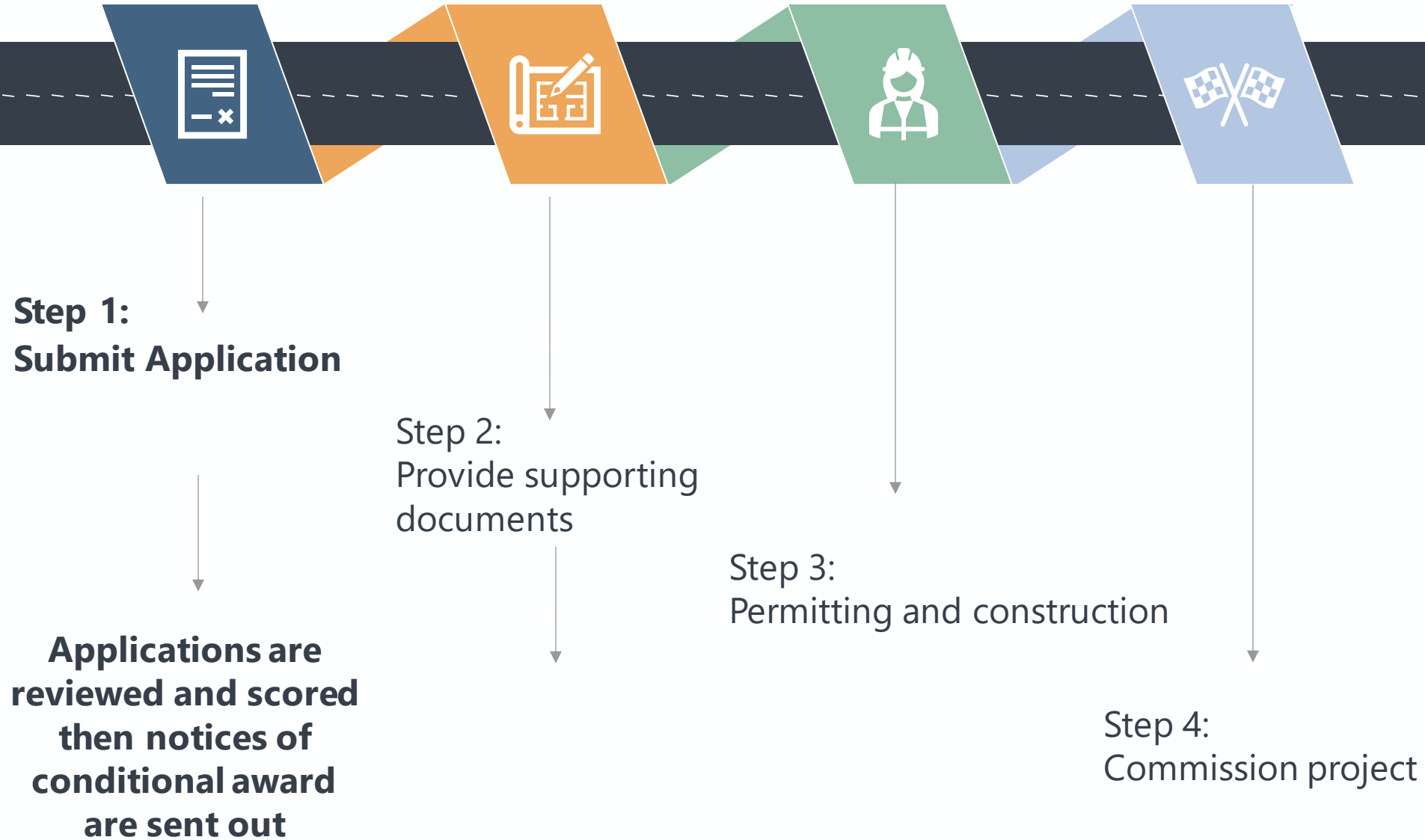


# Q&A



# What Comes After Step 1?

# EnergIIZE Planning Ahead







# Frequently Asked Questions

# You Might Have These Questions

**Q:** *When does the EV Jump Start Funding lane year 2 open for applicants?*

**A:** Applications will be accepted beginning at 9:00 a.m. Pacific Time July 19, 2023 and will close at 5:00 p.m. Pacific Time August 18, 2023. This funding lane is competitive.

**Q:** *How much time do I have to gather documents?*

**A:** Once EV Jump Start funding applicants have been provided with their notice of conditional award after completion of Step 1, they will then have 60 calendar days to provide the information in Step 2.

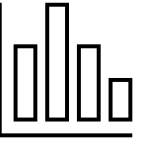
**Q:** *If I have questions before launch of EV Jump Start funding lane year 2, what is best way to get these questions answered?*

**A:** Contact [infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org).



# Q&A

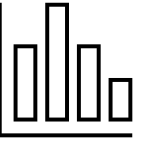
# Poll #3



How helpful was this workshop (on a scale of 1-5)?

- A. 1 - Not very helpful
- B. 2
- C. 3
- D. 4
- E. 5 - Very helpful

# Poll #4



What additional workshop topics  
would you like to see?

# Contact Us

---



877-ENR-GIZE  
877-367-4493



[infrastructure@CALSTART.org](mailto:infrastructure@CALSTART.org)



[www.Energiize.org](http://www.Energiize.org)



48 S. Chester Ave  
Pasadena, CA 91106