DOCKETED	
Docket Number:	21-TRAN-04
Project Title:	Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE Commercial Vehicles)
TN #:	252467
Document Title:	EnergIIZE Drayage Public Set-Aside Funding Application Process Slides and Recording
Description:	EnergIIZE Commercial Vehicles Project Drayage Public Set- Aside Funding Application Process Workshop slide deck from September 25, 2023. A recording of the workshop is viewable at the link below. https://www.youtube.com/watch?v=F15hgLRRPRI
Filer:	CALSTART
Organization:	CALSTART
Submitter Role:	Other Interested Person
Submission Date:	10/2/2023 11:03:08 AM
Docketed Date:	10/2/2023

ENERGIALVEHICLES

EnergIIZE Workshop Drayage Public Set-Aside Funding Application Process

September 2023

EnergIIZE Commercial Vehicles

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

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	Tesi Bravo Deputy Director	Kelly Ratchinsky Project Manager	Eric Canales- Ramirez Research Assistant Intern	Priscilla Barragan Project Manager	Grecia Maya Environmental Scientist
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CALSTART

Agenda

Overview



Walkthrough of Drayage Public Set-Aside Funding Application Process

Step 1. Submit Set-Aside Application

1.1 EnergIIZE Application

1.2 Site Verification Form

1.3 Preliminary Site Plans

1.4 Sample EnergIIZE Terms and Conditions

1.5 Confirmation of Request for Service

1.6 Additional Supporting Documents





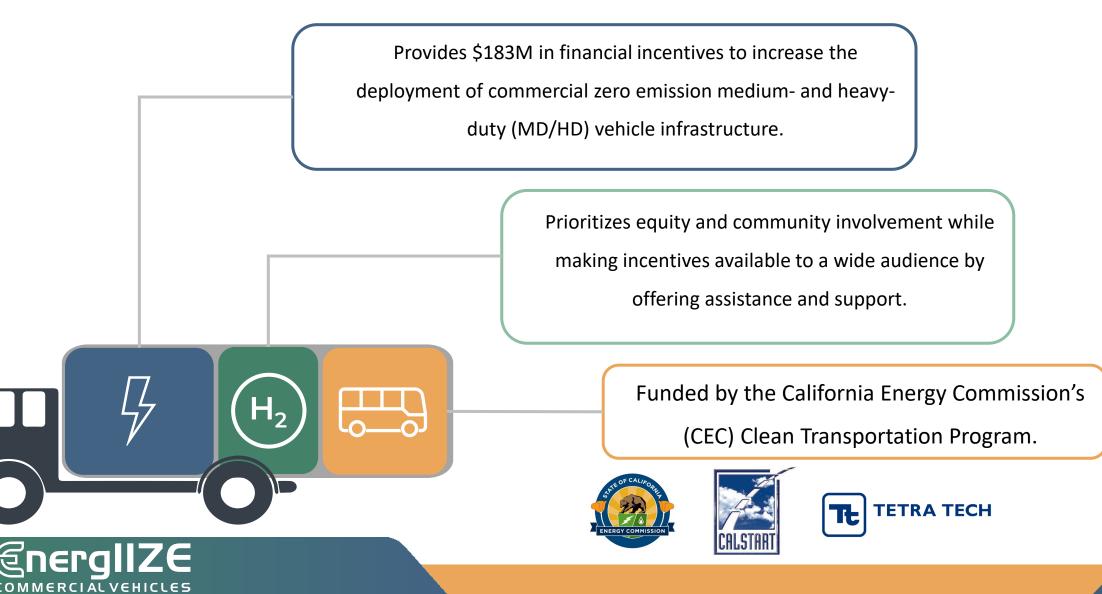
COMMERCIAL VEHICLES

Overview

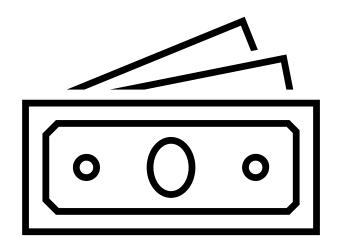
Drayage Public Set-Aside Funding Lane Opening October 19, 2023

Overview of EnergIIZE

Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles



Funding Set Aside For Drayage Public Infrastructure



- Funding has been set aside for drayage public or shared infrastructure through EnergIIZE.
- Applicants may submit EnergIIZE Drayage Public Set-Aside application for infrastructure incentives, then submit request for HVIP (Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project) drayage voucher afterwards.



Drayage Public Set-Aside Funding Lane

The Drayage Public Set-Aside funding lane pairs HVIP vehicle funding with EnergIIZE infrastructure funding.

When can I apply?

- Funding window open from 9am PT October 19th and will remain open on a rolling basis, with batched application reviews.

What is covered?



- 75% of Eligible Costs incurred (see Section 5 of the Transit and Drayage Implementation Manual Addendum)
- Project Cap varies depending on fuel type and equity criteria

Who can apply?

• Fleets or Charging-as-a-Service (CaaS) vendor installing public or shared EV charging/hydrogen refueling infrastructure

See Drayage and Transit Implementation Manual Addendum for full details (<u>www.Energiize.org/resources</u>) under Set Asides dropdown or click <u>here</u>.

I need more help!

• For questions or to request technical assistance, please contact <u>infrastructure@CALSTART.org</u>.



Overview of Drayage Public Incentive Structure

		EV	Hydrogen Fueling	Mixed Fuel		
Basic Incentive Structure	Maximum Incentive Offering	75 percent of Adjusted Project Costs Incurred*				
	Maximum Project Cap	\$750,000	\$2,800,000	\$1,400,000		
		EV	Hydrogen Fueling	Mixed Fuel		
Incentive Structure If Meeting Equity Criteria	Maximum Incentive Offering If Meeting Equity Criteria*	90 percent of Adjusted Project Costs Incurred*				
	Maximum Project Cap If Meeting Equity Criteria**	\$1,000,000	\$3,920,000	\$1,960,000		
	Lane Characteristics	EV	Hydrogen Fueling	Mixed Fuel		
Incentive Structure If Installing More Nozzles	Maximum Incentive Offering If Installing More Nozzles					
	Maximum Project Cap If Installing More Nozzles	\$1,000,000 if installing 10 or more nozzles	\$3,050,000 if installing 4 or more nozzles	\$1,650,000 if installing 10 or more nozzles (combined, not per fuel type)		

Equity criteria are specified in IM Drayage and Transit Addendum Section 5



COMMERCIAL VEHICLES

Step 1: Drayage Public Set-Aside Application

Drayage Public Set-Aside Funding Lane

Drayage Public Set-Aside Application Checklist





Online EnergIIZE Application for Drayage Public Set-Aside (Incentive Processing Center, IPC)



- Proof of Site Ownership, Site Verification Form, or acceptable alternate documentation such as Letter of Intent (see Implementation Manual Addendum Section 8)
- Preliminary Site Plan



Acknowledge Sample EnergIIZE Terms and Conditions



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.



Drayage Public Set-Aside Application Checklist (Continued)





7

Proof of Meeting Equity Criteria (if applicable)

(For Hydrogen and Mixed Use Applicants only) Completion of Appendix B, Critical Milestone 1: Proof of site control



(For CaaS Applicants only) Letter of agreement with associated fleet that infrastructure is intended to be publicly accessible or shared and to be used according to the CaaS business model



Reminder: Application Eligibility

- One site per application and one application per participant (participants tracked by recipient Tax ID Number, or TIN).
- Repeat Applicants: Participants previously awarded EnergIIZE 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.
- Applicant must be in good standing with the California Secretary of State (if required to register).



Step 1: Submit Application

Incentive Processing Center (IPC)

What's on the IPC?

- Application Form Fields to indicate type of fleet
- □ 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
- ✓ Address of Infrastructure Project
- ✓ Make, Size (kg), and Anticipated Quantity of Eligible Equipment Nozzles to be Installed



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, selfcontributions, other external funding sources, and potential EnergIIZE incentive funds.

What You Need to Complete It:

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



Create Incentive Processing Center User Account

EnergIIZE	
💄 First Name	
💄 Last Name	
💌 Email	
Sign Up	
Already have an account?	



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Username: tbravo@	calstart.org										
Thanks, EnergIIZE Team											
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Incentive Processing Center Screenshot



Incentive Processing Center Screenshot

		Application App-000182 Status Total Project Cost
		Pending Submittal \$750,000.00
		Instructions H2 Readiness Questions Basic Details Recipient Project Partn
	🔍 Search 📮 🍯	• Does the project site have any open AHJ violations? Found using link in help text. (1)
Home Applications (Step 1) Projects (Steps 2-6)		No
Home Applications (Step 1) Projects (Steps 2:0)		• Is the recipient TIN required to register with the State of California (SOS)?
Welcome to EnergIIZE Incentive Processing Center!	Start Hydrogen 2023 Application	Yes
 Login to the Incentive Processing Center using the "Login" button in the top-right corner. If you do not have a user created in the system, select the "Create a User" link at the bottom-right of the 	Please note starting February 3, 2023, there is a sandbox Incentive Processing Center portal (https://calstart3	 Is the recipient TIN in good standing with the State of California?
Login page. 3. Click the "Submit EnergIIZE Application Materials" to start your EnergIIZE application.	demo.sandbox.my.site.com/apply/s/) where potential Energil/ZE 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 <u>not</u> be using the sandbox IPC to submit EV Fast Track online applications.	No
	using the sanouxx IFC to submit EV Past Hack online applications.	Does the project require CEQA Analysis?
		No
		 Is the project zoned to accept H2 Fueling?
		Yes
		 Does the project plan meet all relevant regulatory code?
		Yes
		Has the project hired a Fire Protection Engineer?
		No



Demonstrative purposes only

Step 1.2 Site Verification Form

Drayage Public Set-Aside Funding Lane

Step 1: Submit Application

Site Verification Form

What's Inside the Document?

Fields for EnergIIZE applicant

□ Fields for Property Owner

What You Need to Complete It:

✓ If applicant does <u>not</u> 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 EnergIIZE applicant.
- \checkmark 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.



	EnergIIZE Applicant. Please complete as f	ollows:				
	Organization Name:					
	Installation Site Address:					
	City:	State: Zip Code:				
	undersigned has been duly authorized by Applicant to exe	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:	The second se				
	Print Name:	Title:				
	Date:					
te Verificatio	n					
-	PROPERTY OWNER. Please complete as	follows:				
Form	Provide the name of the company, city, trust, organization ("Owner").	or individual that owns the property where the project site will be located				
	Property Owner Name:					
	hydrogen fuel cell refueling equipment at the property; an	("Owner"), hereby represents and warrants to EnergIIZE staff ("Property") where infrastructure will be cant's/participant's installation of certain EV charging station equipment and/or d (iii) that the undersigned has been duly authorized to execute and submit this dges and agrees that EnergIIZE staff is relying on Owner's foregoing certifications				
	Signature of Property Owner or Representative of Property Owner:					
	Print Name:	Title:				

Step 1.3 Preliminary Site Plans

Drayage Public Set-Aside Funding Lane

Step 1: Submit Application

Preliminary Site Plan

What's Inside the Document?

- □ Address of Infrastructure Site.
- Diagram in Site Plan of Charging Infrastructure.

What You Need to Complete It:

✓ Preliminary site plan



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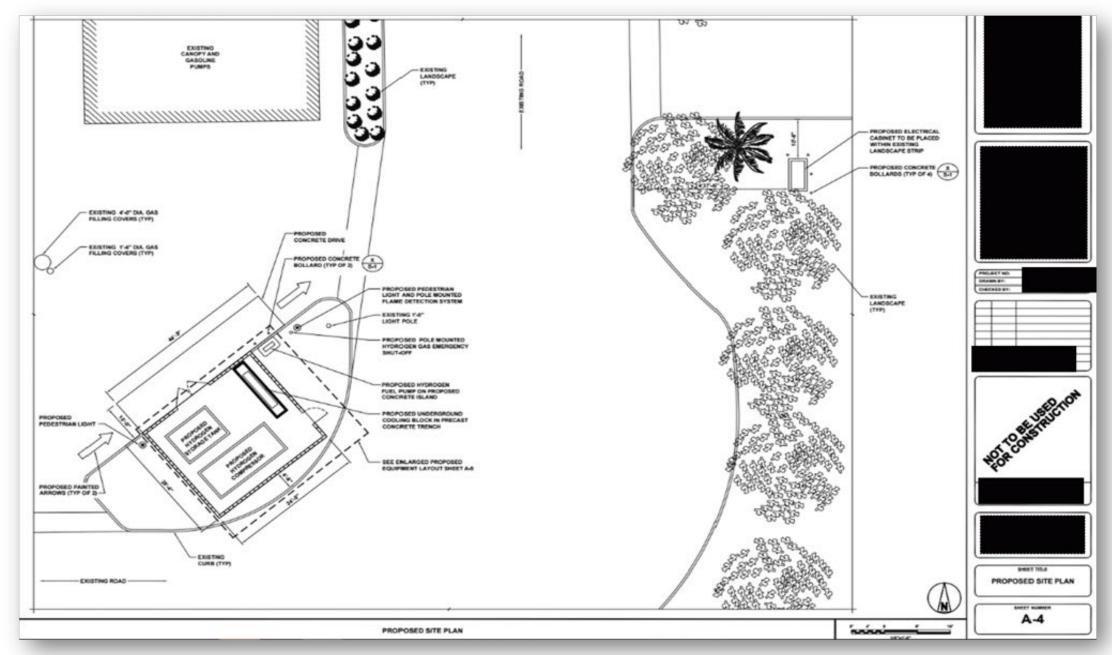
Example Preliminary EV Site Plan



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Example Preliminary Hydrogen Site Plan

Step 1.4 Sample Energlize Terms and Conditions

Drayage Public Set-Aside Funding Lane

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 1.5 Confirmation of Request for Service

Drayage Public Set-Aside Funding Lane

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 makeready (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.



Supporting Documents

Drayage Public Set-Aside Funding Lane

Hydrogen / Mixed-Use Applicants

Critical Milestone 1: The Applicant (for station address submitted with the application) must have control and possession of the site. This can come in the form of proof of an easement agreed to and signed by the property owner at which the hydrogen fueling station is to be constructed. Multiple types of easements may be accepted, please contact us with any questions.

The Applicant must provide to EnergIIZE staff proof of having met this Critical Milestone by submitting adequate documentation of site control and possession. Documentation of site control and possession may include, but is not limited to, an executed lease for the land on which the station will be constructed. EnergIIZE staff will determine whether the documentation submitted by the Applicant is sufficient to show that this Critical Milestone has been met. On a case-by-case basis, considerations can be made for accepting a letter of intent in lieu of a signed lease.



Appendix B, Critical Milestone 1: Proof of Site Control and Possessions

Drayage Equity Criteria

- A small business as recognized by the California State Legislative Code, Section 14837(d) meaning annual revenue less than \$15 million per year. Able to provide 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. Able to provide one of the following:

Minority Business Status

Small Business

Status

- Documentation of Small Business (SB) or Disabled Veteran Business Enterprise
 (DVBE) 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.
- Documentation of certification as a Disadvantaged Business Enterprise (DBE) from CALTRANS, the US Department of Transportation, or another DBE Certifying Agency. Certification must be current.



Drayage Equity Criteria, Part 2

- The site where the infrastructure for the intended HVIP voucher vehicle will be located is within a designated Disadvantaged Community (DAC) or Low-Income Community (LIC) and able to provide documentation of the following:
 - Address of the infrastructure to be built using EnergIIZE funds that is located within a DAC or LIC census tract.
- A California Native American Tribe, California Tribal Organization, or Non-Governmental Organization serving Tribal entities and able to provide documentation of one of the following:

Tribal Status

Infrastructure

LIC

Located In a DAC or

- 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, no documentation is required.
- If the Applicant is not a Federally Recognized Tribal Government, the Applicant's 501(c)(3) Determination Letter from the Internal Revenue Service (IRS).



Drayage Public Set-Aside Doesn't Seem Like a Good Fit?

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

Advanced Vehicle Technology and Infrastructure **Funding Finder Tool**

Planning Grants >

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 o	lisplayed.		keyword	filter
 ZIP Code	Organi	ization(s):	Santa Barbara County APCD Clean Air Grants (Various)	Vehicle Types:	School, Off	ure, Transit, -Road, Truck, Vehicle Type
	Fundir		See website for details	Technology:	Hydrogen, Hybrid, CN	Battery Electric, G/Low Nox, Technology
County	>			Total Progra TBI		Show More 🕇
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Scrappage 6	>					



How Are Submissions Reviewed?

Priority will be given to applicants meeting equity criteria:

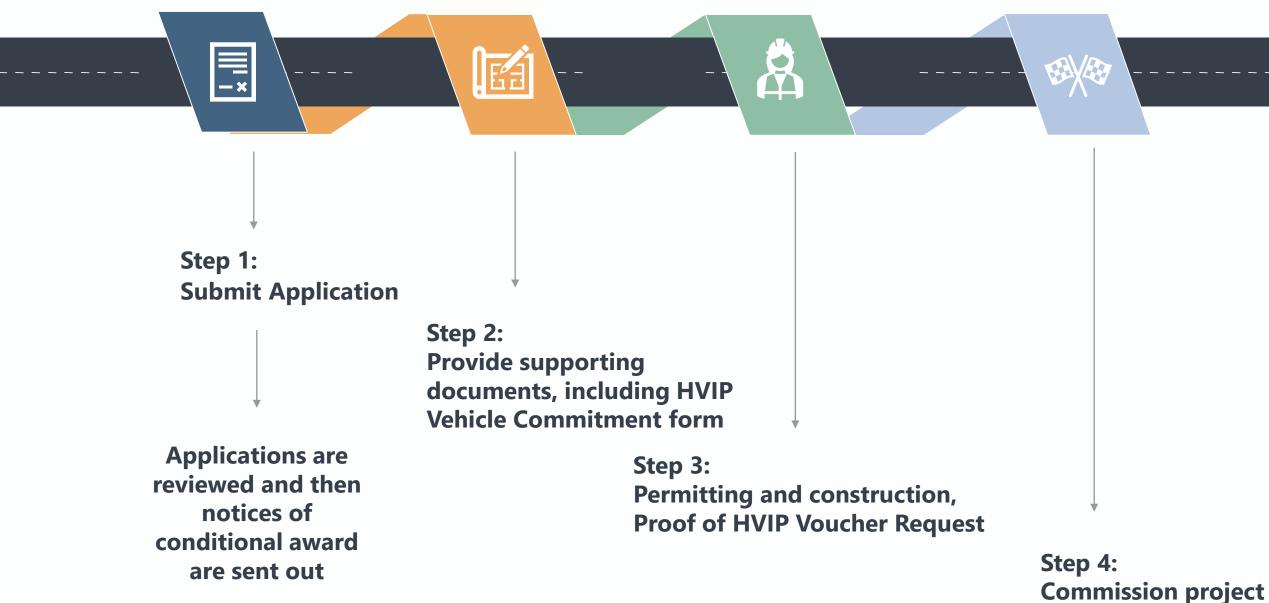
For the Drayage Public Set-Aside, applications will be accepted on a rolling basis, subject to availability of funding. Prioritization will be given to Applicants meeting equity criteria. CALSTART reserves a grace period to ask clarifying questions of Applicants who submit complete online applications.



COMMERCIAL VEHICLES

What Comes After Step 1?

EnergIIZE Planning Ahead



COMMERCIAL VEHICLES

Frequently Asked Questions

You Might Have These Questions

Q: When do the Drayage Public Set-Aside open for applicants?

A: Applications will be accepted beginning at 9:00 a.m. Pacific Time on October 19, 2023 and will remain open on a rolling basis.

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

A: Once 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. If meeting equity criteria, will have 90 days to provide the information.

Q: If I have questions before/during launch of the Drayage Public Set-Aside funding lane, what is best way to get these questions answered?

A: Contact infrastructure@CALSTART.org.



Contact Us



877-ENR-GIZE 877-367-4493



infrastructure@CALSTART.org



www.Energiize.org



48 S. Chester Ave Pasadena, CA 91106