



# Bay Area Air Quality Management District

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*Application Guidance for*

## *Charge!*

For Fiscal Year Ending (FYE) 2019

[www.baaqmd.gov/charge](http://www.baaqmd.gov/charge)

*Charge!* is a grant program that helps offset a portion of the cost of purchasing and installing new publicly available charging stations at qualifying facilities within the Bay Area Air Quality Management District's (Air District) jurisdiction. This grant program is funded by the Air District's Transportation Fund for Clean Air (TFCA).

**The deadline for receiving applications for *Charge!* is 4 PM, June 30, 2019.**

*Applications may be submitted online after attending at least one of the pre-application webinars and reviewing this guidance document.*

**Bay Area Air Quality Management District  
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San Francisco, CA 94105**

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**(415) 749-4994**

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**OTHER AIR DISTRICT GRANT & INCENTIVE PROGRAMS**

In addition to the *Clean Fleets* Program, the Bay Area Air Quality Management District offers grant funding to incentivize emissions reductions to improve air quality in the region. Funds are available for the following project categories:

- |  |  |
|--|--|
| On and Off-Road Heavy-Duty Diesel Vehicles | Shuttle, Ridesharing, and Vanpools           |
| Locomotives                                | Light-Duty Vehicles                          |
| Marine Vessels                             | Bikeways and Bike Parking                    |
| Lower-Emission School Buses                | Alternative Fuel Vehicles and Infrastructure |

The Air District also offers grant funding for Heavy-Duty Vehicles through the Carl Moyer Program. For more information on other Air District Grants and Incentives contact us:

Website: <http://www.baaqmd.gov/grants>

Email: [grants@baaqmd.gov](mailto:grants@baaqmd.gov)

Grants Information Request Line: (415) 749-4994

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***OTHER FUNDING OPPORTUNITIES FOR PEV***

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In addition to the *Charge!* program, other opportunities for funding charging stations may be available. Applicants are encouraged to explore all opportunities and select the one(s) that works best for them. In some cases, *Charge!* funding may be combined with funding from other grant programs.

- **PG&E Electric Vehicle Charge Network:** Customers of Pacific Gas and Electric who are interested in installing charging stations at workplaces, apartments, and condominium buildings may be eligible to receive discounts of 25 – 100% on charging equipment, depending on facility type and location. For more information, please visit [www.pge.com/evcharge](http://www.pge.com/evcharge).
- **Tesla Destination Charging:** If you are interested in hosting Tesla charging stations, please visit <https://www.tesla.com/charging-partners>.
- **Community Choice Aggregation (CCA):** CCA's may offer rate payers incentives for both electric vehicles and charging stations. Please contact your local CCA. You may find a list of California CCA's here: <http://leanenergyus.org/cca-by-state/california/>
- **Low Carbon Fuel Standard (LCFS):** Project sponsors may qualify for LCFS credits to help offset the cost of operating the charging stations. For more information, please visit <https://www.arb.ca.gov/fuels/lcfs/electricity/electricityh2.htm>.

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***BAY AREA AIR QUALITY MANAGEMENT DISTRICT***

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The California Legislature created the Bay Area Air Quality Management District (Air District) in 1955 as the first regional air pollution control agency in the country, recognizing that air pollution transcends political boundaries. The Air District is the public agency entrusted with regulating, measuring, and reducing sources of air pollution in the nine counties that surround San Francisco Bay: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, southwestern Solano, and southern Sonoma counties.

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***TRANSPORTATION FUND FOR CLEAN AIR (TFCA)***

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Tailpipe emissions from on-road motor vehicles account for more than 40% of the criteria air pollutants and about 41% of the green-house gases (GHG) emitted<sup>1,2</sup> and contribute to unhealthy levels of ozone ("smog") and particulate matter in the Bay Area. Significant emissions reductions from the on-road transportation sector are needed to attain State and Federal ambient air quality standards and GHG emission reduction targets.

In 1991, the California State Legislature authorized the Air District to impose a \$4 surcharge on motor vehicles registered within its jurisdiction to fund projects that reduce on-road motor vehicle emissions. These funds support the Transportation Fund for Clean Air (TFCA) Program, which provides funding to qualifying trip reduction and alternative fuel vehicle projects.

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***PURPOSE OF THE CHARGE! PROGRAM***

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The Air District views deployment of zero-emission vehicles (ZEVs) as a promising means to reduce criteria and greenhouse gas emissions from the transportation sector. For fiscal year ending 2019 (FYE 2019) the Air District has committed over \$10 million for clean vehicle projects.

To ensure that TFCA investments in PEVs are well coordinated and effectively reduce mobile source emissions, the [Bay Area PEV Readiness Plan](#) (Plan) was completed in December 2013 by the Air District in partnership with the Metropolitan Transportation Commission (MTC), Association of Bay Area Governments (ABAG), Bay Area local government agencies, and other PEV-stakeholders. This comprehensive regional Plan outlines a series of strategies and best practices for

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<sup>1</sup> BAAQMD, [Bay Area Emissions Inventory Summary Report: Criteria Air Pollutants Base Year 2011](#), May 2014.

<sup>2</sup> BAAQMD, [Bay Area Air Quality Management District, Clean Air Plan 2017](#), April 2017.

accelerating the adoption of PEVs, and also established adoption goals of 110,000 PEVs on Bay Area roads by 2020, and 247,000 by 2025.

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### CHARGE! PROGRAM SUMMARY

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*Charge!* is a TFCA-funded grant program that helps offset up to 75% of the cost of purchasing and installing new publicly available charging stations at qualifying facilities within the Air District's jurisdiction. Funding is available on a first-come, first-served basis to public agencies and private businesses *and is paid to grantees ("Project Sponsors") on a reimbursement basis after the charging stations are placed into service*. Awards are based on the anticipated electricity that a station can deliver to PEVs, and hence its potential to shift drivers away from petroleum-fueled vehicles and reduce petroleum use (and air pollution). The minimum amount of funding available for a single *Charge!* project is \$10,000, which typically can be achieved by deploying at least one DC Fast charging station or at least three level 2 (6.6KW or higher) dual port charging stations.

**The Air District reserves the right to modify this solicitation at its sole discretion. *Please read this package completely before filling out an application; incomplete applications may be rejected.***

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### DEFINITIONS

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**Charging Station:** Also known as electric vehicle supply equipment (EVSE), consists of the conductors, including the ungrounded, grounded, and equipment grounding conductors and the electric vehicle connectors, attachment plugs, and all other fittings, devices, power outlets, or apparatus installed specifically for the purpose of delivering energy from the premises wiring to the electric vehicle. ([http://www.psrc.org/assets/3729/A\\_NEC\\_625\\_2008.pdf](http://www.psrc.org/assets/3729/A_NEC_625_2008.pdf)). Charging stations fall into one of three types:

- **Direct Current (DC) Fast Charging Station:** Uses an external charger, and supplies electricity in the form of direct current, typically at a rate of 40 KW or higher.
- **Level 1 Charging Station:** Supplies electricity to a PEV's onboard charger in the form of alternating current. Level 1 charging stations use a 120V AC connection.
- **Level 2 Charging Station:** Supplies electricity to a PEV's onboard charger in the form of alternating current. Level 2 charging stations require a 208/240V AC connection.

**Executed Funding Agreement:** Contract that has been signed by both the project sponsor and the Air District and contains all terms and conditions for the approved project. *Funding agreements are typically sent to the project sponsor for execution within one month following the Notice of a Proposed Award. Any work performed prior to the full execution of a funding agreement is not eligible for funding or reimbursement.*

**Plug-in Electric Vehicle (PEV):** A vehicle that is propelled in part or solely by an electric motor, is capable of being recharged from an external source of electricity that meets the Society of Automotive Engineers and/or CHAdeMO protocol standard, and meets the California Air Resources Board fuel standard of Plug-in Gasoline Electric Hybrid or Li+.

**Project Term:** The Project Term commences on the date the Funding Agreement is executed and continues until the Grantee/Project Sponsor has completed all contractual obligations.

**Usage Requirement:** Electricity that each proposed charging station needs to deliver to PEVs over the 3-year operation period. Usage is evaluated in aggregate on a project basis by averaging the kWh delivered by each funded charging station during the whole operation period. Usage requirements are listed in Table 1.

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### MANDATORY PRE-APPLICATION WEBINAR AND WEBINAR SCHEDULE

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**Applicants must attend at least one pre-application webinar before submitting an application. Each webinar will be held online and is limited to 100 attendees.** Registration is required. The webinars will cover *Charge!* Program Requirements, the application process and evaluation criteria, and grantee/project sponsor's administrative requirements. The following webinars have been scheduled:

- Thursday, October 25, 2018  
10:00 to 11:00 AM ([Register](#))
- Thursday, November 29, 2018  
1:00 to 2:00 PM ([Register](#))
- Tuesday, December 11, 2018  
10:00 to 11:00 AM ([Register](#))
- Tuesday, January 8, 2019  
1:00 to 2:00 PM ([Register](#))

Based on demand, additional webinars may be scheduled in the future. Notices about additional pre-application webinars will be sent via e-mail to parties that have signed up to receive free Charge! email alerts. Interested parties may visit the Charge! website at [www.baaqmd.gov/charge](http://www.baaqmd.gov/charge) to sign up for email alerts and for Program updates.

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## PROGRAM REQUIREMENTS

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### GENERAL REQUIREMENTS

**Eligible applicants include businesses, non-profits, and public agencies** who either own the property where the proposed charging stations will be installed, or who provide evidence (e.g., lease agreement) from the property owner allowing the applicant to install and operate charging stations for the duration of the Project Term.

**Projects must be voluntary and surplus**—charging stations that are required to be installed by a regulation, local ordinance, or other legal obligations (e.g., legal settlement, condition of lease agreement or use permit, EV-readiness ordinance) are NOT eligible.

**Projects must qualify for at least \$10,000 in Charge! funding**—which typically can be achieved by deploying at least one DC Fast or at least three level 2 (6.6KW or higher) dual port charging stations. Grantees who modify the scope of their project post-award in any way that reduces their award to below the \$10,000 threshold will have their entire project and award cancelled.

**Applicants must be in “good standing” with the Air District**, i.e., in compliance with all Air District, State, and Federal air quality regulations. Also, applicants who were previously awarded an Air District grant, must not have failed a fiscal audit in the past 5 years and must be in compliance with all contractual obligations of that grant.

**Applicants may submit multiple applications; however, no single applicant may receive more than \$500,000 in Charge! funding per fiscal year.**

### FACILITY REQUIREMENTS

Applicants may apply for funding to install qualifying equipment at an existing or new facility located within the Air District’s jurisdiction. For this solicitation, a “Facility” is any designated area or public parking lot/structure that has a distinct location (e.g., parcel number or physical address) where Charge!-funded charging stations will be installed. *Curb-side parking spots and private residential garages that are not for a multi-dwelling unit are not eligible facilities.* Facilities may fall into one or more of the following categories:

- **Destination Facility:** Activity center, such as a library, park, or shopping center. Proposed charging station(s) will be located at or within close proximity to the activity center and are accessible to customers and visitors.
- **Multi-Dwelling Units (MDUs) Facility:** A dwelling consisting of 5 or more residential units. Proposed charging station(s) will be located at or within close proximity to the MDU and are accessible to MDU residents and their guests. Projects located within non-publicly accessible facilities are eligible and subject to case-by-case project requirements. *Single-family (household) residences and MDUs with less than five residential units are NOT eligible.*
- **Transit Parking Facility:** Parking facility available at a transit station, airport long-term parking, or a park-and-ride location. Proposed charging station(s) will provide access to users of these forms of transit.
- **Transportation Corridors Facility:** Proposed charging station(s) will provide to fast charging for PEV drivers making long trips, and are located in close proximity to freeways and highways, e.g., a rest area. *Transportation Corridors Facilities must include at least one DC Fast Charging Station.*

- **Workplace Facility:** Proposed charging station(s) will provide access to charging for fleets, employees, and visitors and is located at, or within close proximity, to an employment center.

## CHARGING STATION REQUIREMENTS

**Charging stations must be new and installed within the [Air District's jurisdiction](#)**—this grant is not retroactive, so applicants are not eligible for award if any of the proposed equipment is ordered, purchased, or installed before a Notice of Proposed Award is issued AND the Funding Agreement has been executed.

**Public Availability:** Charging stations must be available to the general public, operate for a minimum of 3 years, and achieve a minimum usage requirement (Table 1). All funded charging stations must be available for use by the general public at least 250 days per year, for at least 8 hours per day during normal business hours with the exception of MDU facilities which are subject to case-by-case projects;

**Safety Certification:** Charging stations must be certified by the Underwriters Laboratories, Inc. (UL), or equivalent safety standard.

**Stationary and Grid Connected:** Charging stations must be installed at a stationary location (e.g., not on a mobile platform), and must be connected to the electric grid.

**Level 1:** All Level 1 charging stations must be able to deliver electricity to PEVs at minimum rate of 1.4 KW. Eligible Level 1 charging stations are at:

- MDU, Transit Parking, or Workplace facilities with either the SAE standard J1772 connector or a NEMA 5-15 or 5-20 receptacle.
- Any other facility must have the SAE standard J1772 connector.

**Level 2 (low):** Level 2 (low) charging stations must be able to deliver electricity to PEVs at a minimum rate of 3.3 KW and must have the SAE standard J1772 connector.

**Level 2 (high):** Level 2 (high) charging stations must be able to deliver electricity to PEVs at a minimum rate of 6.6 KW and must have the SAE standard J1772 connector.

**DC Fast:** DC Fast charging stations must be able to deliver electricity to PEVs at a minimum rate of 40 KW and must have both the CHAdeMO and SAE Combo connectors. In addition, each DC Fast charging station installed must be paired with either a new or existing Level 2 charging station within 1 mile of the proposed project location.

## GRANTEE/PROJECT SPONSOR OBLIGATIONS

Grantees ("Project Sponsors") must agree to and do all the following:

- Cover 100% of up-front costs (prior to reimbursement), cover all costs in excess of the grant amount, and provide at least 25% of eligible project costs in matching funds after all applicable manufacturer and local/state/federal rebates and discounts are applied;
- Sign (Execute) the Funding Agreement and return to the Air District within 60 days of receiving it;
- Purchase, install, and place into service all approved equipment within 12 months from the date the Funding Agreement is executed;
- Ensure that any work performed with *Charge!* funding is done by a contractor licensed in the State of California. *To check whether a contractor has a valid license, visit the Contractors [State License Board website](#).* The Air District does not require, endorse or recommend which contractor shall be used for a project;
- Obtain and maintain liability and any other necessary insurance for the duration of the "Project Term" (see Appendix A);

- Operate and maintain each funded charging station for a minimum period of three years, and ensure that the project achieves the Charge! Program’s Facility, Charging Station, and Usage Requirements. If a Project Sponsor does not fulfill the usage or operational requirements at the end of 3-year operation period, the Project Sponsor may seek to amend the Funding Agreement to extend the operation period, or the Air District will proportionally reduce the amount of TFCA Funds Awarded;
- Ensure that all locations where charging stations are installed are well-lit, secure, and in compliance with all Local, State, and Federal regulations and/or requirements;
- Submit reports on each charging station’s status and usage to the Air District:
  - Reports every 6 months during the installation phase,
  - Report after all charging stations are placed into service, and
  - Reports every year while the charging stations are in operation, for the duration of the Project Life;
- List the funded charging stations on the US Department of Energy’s Alternative Fueling Station Locator website;
- Acknowledge the Air District as a funding source in a visible location at the facility and in communications promoting the facility; and
- Allow Air District staff or its authorized representatives to inspect the project and conduct financial audits and agree to make available to the Air District all records relating to project performance and expenses incurred.

#### **AWARD AMOUNTS (MAXIMUM AND MINIMUM) AND MATCH FUNDING**

*Charge!* funding is paid on a reimbursement basis, so Project Sponsors are required to pay for all equipment and installation costs up-front. Project Sponsors are also required to provide match funding to cover at least 25% of eligible project costs after all other applicable manufacturer and local/state/federal rebates and discounts are applied.

Award funding is paid to Project Sponsors in two installments: 85% of the award after the charging stations are installed and placed into service, and 15% of the award after the charging stations have completed their operational and usage requirements. For more information on the process, see Program Process and Schedule.

Minimum funding:

- \$10,000. Project Sponsors who modify their project’s scope of work post-award to below this \$10,000 threshold will have the entire project and award cancelled.

Maximum funding:

- 75% of eligible costs incurred by the Project Sponsor, and
- \$500,000 for each applicant in FYE 2019.

The number and type of chargers that are proposed to be installed will determine the Base award amount. Additional “Plus-Up” funding may be available to projects that meet certain criteria.

#### **BASE FUNDING**

Each eligible charging station in a *Charge!* project can receive a pre-determined Base amount of funding specified in Table 1 below (e.g., a project proposing to install two level 2 (high) charging stations is eligible for \$6,000 (\$3,000 x 2) in Base funding).

Table 1: Base Award Amount for Each Charger-Type and Key Charger Requirements

| Charging Station Type:                        | Level 1                    | Level 2 (low) | Level 2 (high) | DC Fast*            |
|---|----------------------------|---------------|----------------|---------------------|
| Max. Base Funding per Station:                | \$750                      | \$1,500       | \$3,000        | \$18,000            |
| Connector Requirement:                        | NEMA** 5-15, 5-20 or J1772 | J1772         |                | CHAdEMO & SAE Combo |
| Output Rating Requirement:                    | 1.4 kW                     | 3.3 - 6.6 kW  | 6.6+ kW        | 40+ kW              |
| Usage Requirement (over 3 years) per Station: | 3,750 kWh                  | 7,350 kWh     | 14,700 kWh     | 90,000 kWh          |

\* Each DC Fast charging station installed must be paired with either a new or existing level 2 charging station within 1 mile of the proposed project location.

\*\* NEMA 5-15 or 5-20 receptacles are acceptable only for level 1 charging stations installed at MDU, Transit parking, and workplace facilities. Level 1 charging stations installed at other facilities must have the SAE J1772 connector.

### PLUS-UP FUNDING

Charge! also offers Plus-Up funding, on top of Base funding, for projects who meet one or more of the following:

- **Multi-port Level 2s:** Level 2 charging stations with more than one J1772 connector are eligible for up to \$1,000 per additional connector. *Note: to be eligible for this Plus-Up, each additional port must deliver a minimum of 5,100 kWh of electricity to PEVs over three years, which is added to the usage requirement for each station. For example, a dual-port level 2 (high) charging station will have a usage requirement of 19,800 kWh over 3 years. Depending on the charging station model, additional ports may affect the electricity output rating requirement for each port and could affect the base funding per station.*
- **Solar Power:** Charging stations that are installed with a new solar power installation at the same physical location are eligible for up to \$1 of funding for every watt of solar capacity added, up to a maximum amount of \$4,000.
- **Transportation Corridor Facilities:** Facilities that are available for public use 24 hours per day, 7 days per week, that are located within one-mile driving distance from the closest exit point of a heavy volume expressway, conventional highway, or freeway are eligible for up to \$7,000 of Plus-Up funding for each qualifying DC Fast charging station installed.
- **Multi-Dwelling Units (MDU):** Charging stations installed at MDU facilities are eligible for an additional Plus-Up funding for each qualifying charger installed as detailed in Table 2:

Table 2: Plus-Up Award Amount for MDU Facilities

| Charging Station Type:                        | Level 1 | Level 2 (low) | Level 2 (high) | DC Fast* |
|---|---------|---------------|----------------|----------|
| Max. Base Funding per Station:                | \$750   | \$1,500       | \$3,000        | \$18,000 |
| MDU Plus-Up Available per Station:            | \$750   | \$2,600       | \$4,000        | \$4,000  |
| Total MDU Plus-Up + Base Funding per Station: | \$1,500 | \$4,100       | \$7,000        | \$25,000 |

Note: MDU Plus-Up cannot be combined with Solar Power Plus-Up.

Note: the total award (Base and Plus-Ups) may be reduced to meet the maximum funding requirements above.

### ELIGIBLE PROJECT COSTS

Charge! funds may only be used to reimburse for the costs of the items listed below:

- Charging station hardware, including tax and shipping fees;

- Installation, including labor, materials (e.g., trenching, wiring, signage, and conduit), and necessary electrical upgrades to meet the demands of the charging station (i.e., electrical panels, and transformers);
- Permit fees; and
- Hardware equipment separate from the charging station used to record the kWh dispensed from the equipment to PEVs (e.g., separate meter, data logger).

For projects that qualify for solar power Plus-Up funding (see above), costs for the following items are also eligible:

- Solar panels, inverters, and battery storage hardware, including tax and shipping fees;
- Labor and materials directly related to the installation of power generation and battery storage equipment.

#### INELIGIBLE COSTS

Charge! funds may not be used to reimburse for the following costs:

- Consultant fees;
- Maintenance, repairs and operations, such as cost of electricity (utility) and network fees;
- Administrative costs, including accounting for Program funds and fulfilling contractual obligations, including, but not limited to audits, reporting and record-keeping requirements specified in the Funding Agreement; and
- Costs to improve parking area that are not directly related to the project.

#### CASE-BY-CASE PROJECTS

Applicants who are considering projects that do not meet all the requirements above may request a case-by-case evaluation. The Air District will determine whether the project qualifies for an award, and if so, how much funding it is eligible for. Case-by-case projects will be evaluated quarterly and if there are funds available after all eligible projects have been awarded. The Air District may request additional information in order to evaluate case-by-case projects.

Some examples of projects that request case-by-case evaluation include:

- Projects with charging stations that are not open to the general public (limited to employees or residents only). Projects located at MDU facilities that are not open to the general public must provide documentation detailing the vehicles that will access the proposed chargers to ensure the usage requirement will be met;
- Projects that request a lower usage requirement; and
- Projects that are co-located with wind power instead of solar power.

#### PROGRAM PROCESS AND SCHEDULE



Each Charge! Program project contains four phases. The activities and milestones for each of the phases are described below.

#### APPLICATION PHASE

During this phase, the applicant prepares necessary documents (listed below) and submits an application online at [www.baaqmd.gov/charge](http://www.baaqmd.gov/charge) after attending at least one of the pre-application webinars.:

- Evidence of Authority to Apply and Implement the Project:
  - a) a signed letter of commitment from the applicant's representative with authority (e.g., Chief Executive or Financial Officer, Executive Director, or City Manager); or
  - b) a signed resolution from the governing body (e.g., City Council, Board of Supervisors, or Board of Directors).
- Proof of property ownership (e.g. titles, deeds, leases, or property tax documents that clearly indicate the property owner)

- If applicant is not the property owner, written permission (legally binding agreement) must be submitted from property owner allowing applicant to install and operate PEV charging stations
- A map showing where the charging stations will be located (including proximity to activity center, major roadways, and nearest charging station), and
- A line-item cost quote for each facility from a licensed contractor. This quote will be used during the evaluation phase. Project Sponsors may select a different vendor after a funding award is made, as long as there is no change to the Project Scope.
- Send W-9 form to:
  - Bay Area Air Quality Management District, ATTN: Finance/Charge!, 375 Beale Street Suite 600, San Francisco, CA 94105.

**EVALUATION PROCESS**

With the exception of case-by-case projects, all applications will be reviewed on a first-come, first-served basis. If the Program is oversubscribed, the Air District will prioritize projects located in [Highly Impacted Communities](#).

| DATE  | ACTIVITY  |
|---|---|
| October 25, 2018  | Program solicitation released   |
| June 30, 2019 (unless fund exhausted sooner)  | Application deadline (solicitation closes)  |
| <ul style="list-style-type: none"> <li>● <b>Projects that request \$10,000 - \$100,000</b>, within 60 days from the date a complete application is submitted</li> <li>● <b>Projects that request greater than \$100,000</b>, have a longer approval process since they require Air District Board approval</li> </ul> | <ul style="list-style-type: none"> <li>● Air District notifies applicant about its determination (Notice of Proposed Award) and a <b>proposed Funding Agreement is sent for the Project Sponsor’s signature</b></li> <li>● Applicants that are not selected for award are notified and provided an explanation of why their project was not selected or found to be ineligible</li> </ul> |

Once the Funding Agreement is fully executed (signed by both the Applicant/Project Sponsor and the Air District), a Notice to Proceed will be issued, and the project moves to the Installation Phase.

**Projects that commence (e.g., pre-order equipment, begin construction) prior to receiving the Notice to Proceed will be disqualified and cancelled.**

**INSTALLATION PHASE**

During this phase, the Project Sponsor is given a maximum of twelve months to purchase and install the charging stations. The Project Sponsor is required to report on the status of the project every six months to the Air District. The Installation Phase ends on the date that **ALL** charging stations are installed and open for use by the general public. The Air District will release the first installment of the grant funds to the Project Sponsor (85% of the award) upon successful completion of the Installation Phase and Air District’s approval of Project Sponsor’s reimbursement request.

| DATE  | ACTIVITY   |
|---|--|
| Within 12 months of the Funding Agreement being executed    | All charging stations must be installed and operating  |
| Every March 1 and October 1 during the Installation Phase   | Project Sponsor submits reports to the Air District  |
| Within 2 months of the completion of the Installation Phase | <ul style="list-style-type: none"> <li>● Project Sponsor submits report documenting equipment has been installed and is operational</li> <li>● Project Sponsor submits Invoice to the Air District</li> <li>● Air District releases first installment (85% of award) to Project Sponsor</li> </ul> |

**OPERATION PHASE**

During this phase, the Project Sponsor will operate and maintain the charging stations for a minimum of three years, and until the usage requirement is met. The Project Sponsor is required to report on the status of the project annually to the Air District, to maintain the required insurance, and to cooperate with the Air District and its designees on fiscal audits and inspections of the project.

Project Sponsors may charge reasonable usage fees to help defray their on-going costs associated with use of electricity, and operations & maintenance.

| DATE                                     | ACTIVITY   |
|--|--|
| During Operation Phase                   | <ul style="list-style-type: none"> <li>Project Sponsor must maintain and operate the charging stations</li> <li>Air District may conduct inspections and/or fiscal audits</li> </ul> |
| Every March 1 during the Operation Phase | Project Sponsor submits annual reports to the Air District   |
| Upon completion of the Operation Phase   | Air District releases second installment (15% of award) to Project Sponsor   |

**RECORDS RETENTION PHASE**

*The Project Term extends for three additional years after the end of the Operation Phase.* During this phase, the Project Sponsor is required to maintain all Project records in a centralized location for three additional years after the end of the Operation Phase. The Project Sponsor is encouraged to continue maintaining and operating the charging stations, although it is no longer a contractual requirement to do so.

| DATE   | ACTIVITY  |
|--|---|
| For 3 years beginning upon completion of the Operation Phase | Project Sponsor must maintain all records in a centralized location |

**ADDITIONAL INFORMATION AND QUESTIONS**

Responses to questions, program materials, and program updates will be posted on the Program website at: <http://www.baaqmd.gov/charge>.

If you have questions, please contact Mark Tang, Staff Specialist by email at [mtang@baaqmd.gov](mailto:mtang@baaqmd.gov) (subject "RE: Charge! Program") or by mail to 375 Beale Street, Suite 600, San Francisco, CA 94105.

**APPENDIX A: INSURANCE GUIDELINES**

Project Sponsors who are selected for award must obtain and maintain the required insurance coverage for the duration of their Project’s Term. The typical funding agreement requires that each Project Sponsor provide documentation showing that the Project Sponsor meets the following requirements for each of its projects.

- A. Liability Insurance with a limit of not less than \$1,000,000 per occurrence, of the type usual and customary to the business of the Project Sponsor, and to the operation of any portion of the Project.
- B. Property Insurance in an amount of not less than the insurable value of Project equipment funded under the Agreement, and covering all risks of loss, damage or destruction of such equipment.

Acceptability of Insurers: Insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A:VII.

The Air District reserves the right to specify different types or levels of insurance in the funding agreement. The Air District may, at its sole discretion, waive or alter this requirement or accept self-insurance in lieu of any required policy of insurance.