

CHARGE! PROGRAM

REVISED (REDLINED) GUIDANCE FOR FISCAL YEAR ENDING (FYE) 2023

www.baaqmd.gov/charge

CHARGE! IS A GRANT PROGRAM THAT HELPS OFFSET A PORTION OF THE COST OF PURCHASING AND INSTALLING NEW CHARGING STATIONS AT QUALIFYING FACILITIES AND AT MULTI-FAMILY HOUSING LOCATIONS IN THE BAY AREA.

The deadline for submitting completed applications for the Charge! Program is 5:00 PM PT on March 3, 2023.

~~Register for November 29, 2022 webinar here.~~

A recording of the webinar ~~will also be~~ is available on the [Charge! Program website](http://www.baaqmd.gov/charge).

Please read this package completely before filling out an application; incomplete applications may be rejected and/or ranked lower.

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FYE 2023 Charge! Program Changes

This is a summary of major program changes, and not a complete list of all the changes in the document.

- **Charger uptime:** Funded Level 2 and DC Fast charging stations must be operational for at least 97% of a charging site's standard hours of operation for the duration of the project's Operational Period. It will be the Grantee/Project Sponsor's responsibility to demonstrate that the uptime requirement is met.
- ~~**Charging station requirements:** Charging stations must now meet OCPP 2.0.1 and ISO 15118 requirements, in addition to existing connector, output rating, and energy star requirements.~~
- **Funding levels:** Base grant award amounts have been increased for all port types (Level 1, Level 2 [low/high], DC Fast).
 - DC Fast charging ports and funding levels will also be split between two output ratings: 50-149.99 kilowatts (kW), and 150+ kW.
- **Funding stacking:** All project types are eligible to combine *Charge!* Program funding with funding from other incentive programs. If projects are co-funded with multiple funding sources, it is the responsibility of the applicant to ensure all requirements and deliverables are met. Only multi-family housing projects were eligible to stack funds in the previous funding cycle.
- **Funding structure:** Funding will be allocated per active connector, instead of per charging station. Definitions of electric vehicle supply equipment (EVSE) port vs active connector can be found in the Definitions Section on page 16.
- **Minimum qualifying grant award:** Government and multi-family housing projects are still required to qualify for a minimum of \$10,000 in grant funding. All other projects must qualify for a minimum of \$250,000 in grant funding based on the updated funding table. In previous funding cycles, the minimum qualifying grant award requirement was \$1,000,000.
- **Multi-family Housing:** Now defined as a building consisting of four or more residential units. In previous funding cycles, multi-family housing was defined as five or more residential units.
- **Plus-up funding:** There will only be plus-up funding for project sites in Priority Population Areas and at multi-family housing sites. Solar and Transportation Corridor plus-ups will no longer be provided. We will consider solar as part of the scoring and evaluation process.
- **Usage requirement:** Usage requirements are no longer pre-determined. Applicants will be required to estimate projected charger usage in their application. If awarded funding, the estimated usage will be listed in the Funding Agreement. Projects that do not meet their stated usage may be in breach of the Funding Agreement and subject to repayment.

Please read this package completely and submit any questions or comments to charge@baaqmd.gov.

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BAY AREA AIR QUALITY MANAGEMENT DISTRICT

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.

Tailpipe emissions from on-road motor vehicles account for more than 40% of the criteria air pollutants and about 41% of the greenhouse gases (GHG) emitted¹ 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. The Air District uses incentives to accelerate the adoption of low emission mobile sources and technologies.

In December 2013, the Air District, in collaboration with its partners (Metropolitan Transportation Commission, Association of Bay Area Governments, local Bay Area government agencies, and other plug-in electric vehicle [PEV] stakeholders), issued the [Bay Area PEV Readiness Plan](#) (Plan) to ensure coordinated investments in zero-emission vehicles. This comprehensive regional Plan outlines a series of strategies and best practices for accelerating the adoption of PEVs, and also establishes adoption goals of 110,000 PEVs on Bay Area roads by 2020, and 247,000 PEVs by 2025. Similarly, the Air District's [EV Acceleration Plan](#) has established interim EV adoption goals of 1.5 million EVs on Bay Area roads by 2030, and having 90% of Bay Area vehicles being zero emissions by 2050.² These goals are aligned with the state's goals of five million zero-emissions vehicles (ZEVs) by 2030 and nearly 100% ZEVs by 2050.

On September 23, 2020, California Governor Gavin Newsom issued Executive Order (EO) N-79-20 setting new statewide goals for phasing out light-duty internal combustion engine vehicles. On August 25, 2022, the California Air Resources Board (CARB) approved the [Advanced Clean Cars II Rule](#), which codifies EO N-79-20.³ By 2035, 100% of new cars and light trucks sold in California will be zero-emission vehicles, including plug-in hybrid electric vehicles (EVs).

CHARGE! PROGRAM

Charge! is a grant program that helps offset a portion of the cost to purchase and install new publicly available charging stations at qualifying facilities, and private charging stations to serve fleets and multi-family housing locations [within the Air District's jurisdiction](#). The charging stations must serve light-duty vehicles with a gross vehicle weight rating (GVWR) of 8,500 pounds or lighter. Funding is available to homeowner associations, public agencies, and private businesses through a competitive solicitation 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 charging station can deliver to PEVs, and hence its potential to shift drivers away from ICE vehicles and reduce both petroleum use and air pollution. The Air District reserves the right to modify this solicitation at its sole discretion.

HOW TO APPLY

Charge! Program applications will be completed and submitted through [Fluxx](#), the Air District's online application system. Interested parties may visit the [Charge! Program website](#) to sign up for email alerts and updates. Please read this guidance completely before filling out an application; incomplete applications may be rejected and/or may be ranked lower. Applicants are encouraged to review and reference the Fluxx Application User Guide (available on the *Charge!* Program website) which describes the online application process. Please contact Danny Fung at charge@baaqmd.gov (subject "RE: *Charge!* Program") for assistance with application submittal.

¹ [Bay Area Air Quality Management District, Clean Air Plan 2017](#), April 2017.

² [Bay Area Air Quality Management District, EV Acceleration Plan](#), March 2021.

³ [California Air Resources Board, California moves to accelerate to 100% new zero-emission vehicle sales by 2035](#), August 2022.

PROGRAM DETAILS

GENERAL SOLICITATION GUIDANCE

The Air District may:

- Select one or more proposals for this award;
- Award less than the total program budget of \$5,000,000 if there are not enough qualified applications;
- Partially fund applications by funding discrete portions of proposed projects. If the Air District decides to partially fund an application, it will do so in a manner that does not prejudice any applicants or affect the basis upon which the application was evaluated and selected for award, thereby maintaining the integrity of the competition and selection process;
- Follow-up with applicants if clarification is needed;
- Place eligible proposals on a backup list that could be funded if additional funds become available;
- Cancel this solicitation;
- Revise the amount of funds available under this solicitation;
- Amend this solicitation as needed;
- Reject any or all applications received in response to this solicitation;
- Issue a second solicitation round if no sufficient project is found in first round;
- Fund projects with applicants using leftover, remaining funds from this current solicitation if selected applicants withdraw their project or are unable to complete the project as proposed; and
- Allow project component substitutes, cancel or re-rank projects at the Air District's discretion.

FYE 2023 PROGRAM FUNDING PRIORITIES

The Air District will prioritize projects that install EV charging at multi-family housing (specifically affordable and below market rate housing sites), and projects located in environmental justice communities. A *Charge!* Program goal is to award a minimum of 60% of the total available *Charge!* Program funding to projects located in [Priority Population Areas](#), as defined by the CARB using [CalEnviroScreen 4.0](#) data.

FUNDING OPTIONS

Each eligible charging station in a *Charge!* Program project can receive up to the pre-determined amount of funding specified on Table 1.

Applicants may combine *Charge!* Program funds with other incentive programs, as allowed by the other programs and approved by the Air District. A minimum of 15% cost sharing/matching funds from the applicant or site owner/operator is required for all projects. *Charge!* Program grant funds cannot exceed 85% of a project's total project cost. In no event shall the total of the public incentives received exceed 100% of the eligible project costs. Grantees/Project Sponsors that receive multiple incentives for a project must meet all criteria associated with each individual funding source. Grantees/Project Sponsors must disclose information on the total grant funds received (or applied for) from all sources at the time of application and when reimbursement is requested.

FUNDING

The maximum project grant award amount will be the lesser of:

- Total eligible funding based on Table 1 below, or
- 85% of the project's eligible total project cost.

Table 1: Maximum Award amount for each port type for projects located at qualifying Destination, Multi-Family Housing, Transit Parking, Transportation Corridor, and Workplace facilities

BASE FUNDING					
Charging Station Type	Level 1	Level 2 (low)	Level 2 (high)	DC Fast	
Active Connector Output Rating*	1.4 kW	3.3 – 6.6 kW	6.6+ kW	50 - 149.99 kW	150+ kW
Base Funding <u>Per Active Connector</u>	\$1,500	\$2,500	\$4,000	\$25,000	\$35,000
PLUS-UP FUNDING					
The Charge! Program also offers Plus-Up funding, on top of Base funding, for projects who meet one or more of the following:					
<u>Priority Population Areas</u> **	\$500	\$1,000	\$1,500	\$10,000	\$10,000
Multi-Family Housing	\$500	\$1,000	\$1,500	-	-
Maximum Funding Per Active Connector, Including All Plus-Up Funding	\$2,500	\$4,500	\$7,000	\$35,000	\$45,000

* Each active connector must be able to simultaneously maintain the stated level of kW output.

** Designated areas eligible to receive this plus-up are subject to change.

Plus-Up Requirements:

Additional plus-up funding for each qualifying charger installed that meets the following criteria:

- **Priority Population:** Charging stations installed in Priority Population Areas.
- **Multi-Family Housing:** Charging stations installed at multi-family housing facilities.

Note: the total award (Base and Plus-Ups) may be reduced at the Air District's discretion.

Please be aware that while there are no longer fixed usage requirements based on the EV charging port type funded, applicants will be required to provide an estimate of the anticipated three-year charger usage based on the number of proposed charging ports, facility type(s), number of parking spaces, and other contributing factors. The estimated usage will be considered during the application review and scoring process. If awarded, this estimated usage will be included in the project Funding Agreement as the usage requirement. If the usage requirement is not met by the end of the project's Operational Period, the Grantee/Project Sponsor may be in breach of the Funding Agreement and subject to repayment.

GENERAL APPLICATION ELIGIBILITY & REQUIREMENTS

- **Applicants must be in "good standing"** (i.e., compliant with all Air District, state, and federal air quality regulations) and applicants who were previously awarded an Air District grant must not have failed a fiscal audit in the past five years and must be in compliance with all contractual obligations of that grant.
- **Eligible applicants include businesses, homeowner associations, non-profits, and public agencies** who either own the property where the proposed charging stations will be installed, or who have authority/permission from the property owner to install and operate charging stations for the duration of the Project Term. Applicants are required to submit a *Charge!* Facility Form demonstrating permission from the property owner allowing the applicant to install and operate charging stations for the duration of the Project Term. The *Charge!* Facility Form can be submitted after the application deadline;

however, all completed forms must be received prior to Funding Agreement execution. Religious institutions are not eligible to apply and grant funds may not be used to install equipment on property belonging to or operated by religious institutions.

- **Projects must be voluntary and surplus** – Existing and new construction projects are eligible for funding as long as the projects are voluntary and lead to surplus emission reductions. New construction projects must also be completed within the standard Charge! Program timeline. Charging stations that are required to be installed by a regulation (e.g., [CALGreen](#)), local ordinance, or other legal obligations (e.g., legal settlement, condition of lease agreement or use permit, EV-readiness ordinance) are NOT eligible. No equipment is to be ordered and no work is to begin on a project until a fully executed Funding Agreement between the Air District and the Grantee/Project Sponsor is in place. No costs or financial commitments that are incurred or undertaken prior to the date of full execution of the Funding Agreement will be considered for reimbursement from the Air District. Approval from the Air District’s Board of Directors does not guarantee funding. Only a fully executed Funding Agreement constitutes an obligation for the Air District to fund a project.
- **Projects must qualify for at least \$250,000* in Charge! Program funding** – Grantees/Project Sponsors who modify the scope of their project post-award in any way that reduces their award to below the \$250,000 threshold may have their entire project and award cancelled. Grantees/Project Sponsors who modify the scope of their project post-award that reduces their award below \$10,000 will have their entire project and award cancelled.

** Government sponsored and projects exclusively at multi-family housing locations must qualify for at least \$10,000 in Charge! Program funding.*

- **No single applicant may receive more than \$3,000,000 in Charge! Program funding per fiscal year.**

FACILITY TYPES

Applicants may apply for funding to install qualifying equipment at a facility located within the Air District’s jurisdiction. Religious institutions are not eligible to apply and grant funds may not be used to install equipment on property belonging to or operated by religious institutions. 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! Program-funded charging stations will be installed. Existing and new construction facilities are eligible for funding and may fall into one or more of the following categories:

- Destination
- Multi-Family Housing
- Transit Parking
- Transportation Corridor
- Workplace

Descriptions of each facility type are provided in the Definitions section below.

CHARGING STATION REQUIREMENTS

Charging stations must be new and installed within the [Air District’s jurisdiction](#): this grant is not retroactive, therefore applicants are not eligible for award if any of the proposed equipment is ordered, purchased, or installed before the Funding Agreement has been fully executed. Grant funding is for new equipment and installations and cannot be used to repair or replace broken or out-of-service charging equipment.

Charger Uptime: The goal is for funded Level 2 and DC Fast charging stations to be operational for at least 97% of a charging site’s total standard hours of operation for the duration of the project’s Operational Period, excluding extraordinary events such as: accidents, power loss, natural disasters, network outages, planned utility outages, theft, and vandalism. Charging site downtime is defined as any period of time within the total standard hours of operation during which the charging station is incapable of dispensing electricity or when the network indicates that the connector is inoperable. It will be the Grantee/Project Sponsor’s responsibility to record the type of extraordinary events and their duration, and to demonstrate this uptime requirement is met. Charging station uptime and downtime records must be made available to the Air District upon request. If the Grantee/Project Sponsor cannot meet

this uptime requirement, the project may be in breach of the Funding Agreement and subject to repayment. Charger uptime will be calculated and reported as:

$$\text{Uptime (\%)} = \left(\frac{\text{Total Standard Hours of Operation} - \text{Downtime}}{\text{Total Standard Hours of Operation}} \right) \times 100$$

Keep in mind that different incentive programs may have different charger uptime definitions and/or formulas. If a Grantee/Project Sponsor is stacking funding sources, it is the Grantee/Project Sponsor's responsibility to demonstrate compliance with charger uptime requirements for all funding sources.

Public Availability: Funded charging stations must be available to the general public and operate for a minimum of three years. Funded charging stations at Transportation Corridor Facilities must be available for public use 24 hours per day, seven days per week. Funded charging stations at all other facility types must be available for use by the general public at least 250 days per year, for at least eight hours per day during normal business hours. Private charging stations at workplaces or multi-family housing may be exempt from public accessibility requirements.

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

Stationary & Grid Connected: Charging stations should be installed at a stationary location and connected to the electric grid. Mobile charging stations will be considered on a case-by-case basis.

Table 2: Charging station requirements

Charging Station Type	Level 1*	Level 2 (low)	Level 2 (high)	DC Fast	
Connector Requirement	NEMA 5-15, 5-20 or J1772	J1772	J1772	CHAdeMO or SAE CCS	
Output Rating Requirement Per Active Connector**	1.4 kW	3.3 – 6.6 kW	6.6+ kW	50-149.99 kW	150+ kW
Energy Star Certification Requirement	No	Yes	Yes	None	
ISO 15118-3***	Funded charging stations must conform with ISO 15118-3.				
OCPP 2.0.1***	Funded charging stations must be Charge Point Protocol (OCPP) 2.0.1 certified to Core and Safety Certificate by the Open Charge Alliance (OCA).				

* Level 1 charging stations at:

- Multi-Family Housing, Transit Parking, or Workplace facilities must be equipped 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.

** Each connector must be able to simultaneously maintain the stated level of kW output.

~~*** See Definitions Section for summary of ISO 15118-3 and OCPP 2.0.1 Requirements.~~

Payment Requirements: If payment is required for charger use, the equipment models must be able to accept some form of credit card payment and accept more than one form of payment. The equipment is not required to have a credit card reader installed, but credit card payment must be accepted in some form (e.g., mobile app, toll-free, etc.). Applicants are responsible to complying with [Senate Bill 454](#) Electric Vehicle Charging Stations Open Access Act (Corbett, Chapter 418, Statutes of 2013) requirements.⁴

⁴ [California Legislative Information, Senate Bill No. 454, 2013-2014](#)

GRANTEE/PROJECT SPONSOR OBLIGATIONS

The Air District will bring selected project(s) to the Air District's Board of Directors for consideration and will then enter into Funding Agreements for the selected project(s). Funding Agreements will include requirements for: project schedule, deadlines, funding award amount, project scope, performance requirements/penalties, monitoring and reporting, payment procedures, recordkeeping, termination, repayment, etc. A [sample Funding Agreement](#) is available on the *Charge!* Program website. The following are some of the requirements Grantees/Project Sponsors must agree to:

- Obtain and maintain liability and any other necessary insurance for the duration of the Project Term;
- Sign (execute) the Funding Agreement and return to the Air District within 60 days of receiving it;
- Own, 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!* Program 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 specific contractor(s) to be used for a project;
- EVITP certification: Use Electric Vehicle Infrastructure Training Program (EVITP) certified electricians for the installation of the EV chargers in accordance with [Public Utilities Code 740.20](#):
 - All electric vehicle charging infrastructure and equipment shall be installed by a contractor with the appropriate license classification, as determined by the Contractors' State License Board, and at least one electrician on each crew, at any given time, who holds an EVITP certification.
 - Projects that install a charging port supplying 25 kW or more to a vehicle have at least 25% of the total electricians working on the crew for the project, at any given time, who hold EVITP certifications.
- Be bound by all the provisions of State Labor Code Section 1771 regarding prevailing wages paid to workers employed on public works and to provide confirmation of compliance if requested.
- Pay 100% of up-front costs (prior to reimbursement), all costs in excess of the grant amount, and provide at least 15% of eligible project costs in matching funds after all applicable manufacturer and local/state/federal rebates and discounts are applied;
- Identify and implement a mechanism to accurately track charging station usage in kilowatt-hours (kWh). Acceptable methods include:
 - Installation of a new independent energy meter only serving the new chargers,
 - Energy management software (annual subscription fees are not eligible costs and will not be reimbursed);
- 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;
- 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 three-year Operational Period, the Grantee/Project Sponsor may request an amendment to the Funding Agreement to extend the Operational Period that is subject to Air District approval, or the Air District will proportionally reduce the amount of Funds Awarded;
- Security Interest: Grantees/Project Sponsors grant the Air District a security interest in the Project Equipment that has been purchased partially or entirely with funding provided by the Air District pursuant to the Funding Agreement and any amendments thereto. The Grantee/Project Sponsor acknowledges and agrees that the Air District shall have all lien rights as a secured creditor on the Project Equipment throughout the term of the Funding Agreement. The Grantee/Project Sponsor agrees and authorizes the Air District to file a Uniform Commercial Code (UCC) financing statement (Form UCC-1) or similar security instrument to secure its interests in the Project Equipment.

- Submit reports on each charging station's status and usage to the Air District:
 - Semi-annual reports during the Implementation Period (i.e., installation of funded chargers),
 - Expenditure 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 [U.S. Department of Energy 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.

ELIGIBLE PROJECT COSTS

Charge! Program funds can only be used to reimburse the costs of the items listed below that are incurred after Funding Agreement execution:

- 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);
 - If an equipment vendor would like to request the use of in-house labor for installing charging stations, the vendor must submit a formal request to the Air District and receive approval.
 - If an equipment vendor receives approval from the Air District to use in-house labor for approved *Charge!* Program projects, the equipment vendor must submit the following when requesting reimbursement:
 - A budget summary for the in-house labor costs, including: staff names, job function, hourly rate, total hours worked, dates worked, and details regarding the work completed.
 - Corresponding copies of paystubs for in-house labor employees.
 - Additional information, as requested by the Air District.
- Permit & site design 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).

INELIGIBLE COSTS

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

- Consultant fees;
- Environmental review;
- Maintenance, repairs and operations, such as cost of electricity (utility) and network fees (e.g., subscription fees, cloud-based services, customer support, and other software fees related to the management and operation of the charging stations);
- Administrative costs: accounting for Program funds, fulfilling contractual obligations, 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.

PROGRAM PROCESS AND SCHEDULE

Each *Charge!* Program project consists of five periods. The activities and milestones for each of the periods are described below.

Application

Evaluation

Implementation

Operation

Records Retention

SOLICITATION & PROJECT MILESTONES

Table 3 describes the major milestones and the Project Sponsor journey, including the reimbursement schedule. Rows highlighted in yellow indicate reporting requirements.

Table 3: Solicitation & Project Milestones

DATE	ACTIVITY
November 15, 2022	Program solicitation released
March 3, 2023	Application deadline (solicitation closes)
EVALUATION PERIOD	
August 31, 2023 All projects will be ranked, and selected projects awarded	- Air District notifies applicant about its determination (Notice of Proposed Award) and a proposed Funding Agreement is sent for the Grantee/Project Sponsor's signature - 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
IMPLEMENTATION PERIOD	
Within 12 months of the Funding Agreement being executed	- All charging stations must be installed and operating - Air District may conduct inspections of installed equipment
Every April 15 and October 15 during the Implementation Period	Grantee/Project Sponsor submits semi-annual reports to the Air District
OPERATIONAL PERIOD	
Operational Period (minimum three years after all charging stations have been installed and are operational)	- Grantee/Project Sponsor must maintain and operate the charging stations - Air District may conduct inspections and/or fiscal audits
Every March 1 during the Operational Period	Grantee/Project Sponsor submits annual reports to the Air District
RECORDS RETENTION	
For three years beginning upon completion of the Operational Period	Grantee/Project Sponsor must maintain all records, documents, and reports in a centralized location

APPLICATION PERIOD

During this period, the applicant prepares the necessary documents listed below, provides all requested information, signs, and submits an application through [Fluxx](#), the Charge! Program's online grants portal. Templates and samples of these documents are available on the [Charge! Program website](#).

- Applicant W-9, signed;
- Charge! Facility Form, serving as proof of property ownership/permission to install and operate;
- Charging station specification sheets and proof of certification;
- Estimated project usage in kWh for the three-year Operational Period. Applicants can estimate this by:
 - Reaching out to an EV charging vendor, such as those included in the [Interested Partners List](#); or
 - Using their own estimation methodology based on site-specific factors such as existing parking spaces, existing EV charger usage, and existing/projected EV ownership population of project site(s).
- Evidence of Authority to Apply and Implement the Project:
 - 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
 - A signed resolution from the governing body (e.g., City Council, Board of Supervisors, or Board of Directors).
- Line-item cost quote for each facility from a licensed contractor. This quote will be used during the evaluation period. Project Sponsors may select a different EV charging vendor after a funding award is made, as long as there is no change to the Project Scope.

- If the cost estimate is completed by the applicant's organization, the estimate must be completed and endorsed by a California Licensed Engineer.
- Map(s) showing where the charging stations will be located. The map(s) must be labeled and show proximity to an activity center, major roadways, and the nearest charging station.

EVALUATION PERIOD

Project applications will be reviewed, scored and competitively ranked for recommendation. Applications will be accepted through the [Fluxx](#). If oversubscribed, the Air District may hold applications as backup for additional program funds that may become available. Incomplete applications, applications from ineligible applicants, and applications outside the scope of the solicitation may not be scored and may be disqualified. The scoring criteria described in Table 4 shows the total points that may be awarded to each application – proposals that do not meet all criteria are still encouraged to apply but may be scored lower.

Table 4: Application Evaluation Criteria and Scoring

EVALUATION CRITERIA	POSSIBLE POINTS
Project Details & Implementation Plan Project scope/details, partners/community support, location/facility type, accessibility	10
Project Benefits Number of units to be implemented, number of units per county and facility type, estimated emissions reductions, anticipated charger utilization, and community support, alternative power source (e.g., solar, wind), and technology type	20
Priorities Project location: Priority Population Areas , multi-family housing, affordable housing	25
Readiness Resources available, readiness for implementation, and project timeline	15
Qualifications Applicant experience/history, partners' roles and experience, local/green business, Minority Business Enterprises, and Women's Business Enterprises	10
Budget Itemized equipment and infrastructure cost, co-funding/match, cost per port installed, and total funds requested	10
Application Completeness Required documents and facility and charger information	10
Total Points Possible	100

After the applications are scored and ranked, the Air District will allocate funding to support the highest scoring projects until funding is depleted. Successful applications will be brought to the Air District's Board of Directors for consideration and approval. Upon Board of Directors approval, Air District staff will forward a Notice of Proposed Award and Funding Agreement to Grantee/Project Sponsors for execution. Once the Funding Agreement is fully executed (i.e., signed by both the Grantee/Project Sponsor and the Air District), the project moves to the Implementation Period.

IMPORTANT: Projects that commence (e.g., pre-order equipment, begin construction, sign service agreements) prior to receiving a fully executed Funding Agreement will be disqualified and cancelled.

IMPLEMENTATION, OPERATION & REIMBURSEMENT

During the Implementation Period, the Grantee/Project Sponsor has a maximum of 12 months to purchase and install the selected charging stations. The Grantee/Project Sponsor is required to comply with the EVITP requirements, and report to the Air District the status of the project every six months until the end of the Implementation Period. The Implementation Period ends on the date that all charging stations are installed and open for use by the general public and/or community. The Air District will release reimbursement of grant funds to the Grantee/Project Sponsor on a reimbursement schedule as described in Table 5 below.

Table 5: Reimbursement Schedule

PROJECT STAGE		PAYMENT ACTIVITY
Implementation Period	Funded charging stations are purchased, installed, and placed into operation.	Grantee/Project Sponsor pays 100% of project costs.
Initial Reimbursement Request	Grantee/Project Sponsor submits Expenditure Report to the Air District within 60 days after last charging station was placed into operation.	Air District reviews Expenditure Report. Once approved, up to 85% of the grant award will be issued to the Grantee/Project Sponsor.*
Operational Period	Project operates for a minimum of three years, until completion of contracted usage requirements, and submits usage records and annual reports.	None.
Final Reimbursement Request	Grantee/Project Sponsor submits Final Reimbursement Request following the end of the Operational Period, completion of contracted usage requirement, and submission of all required reports.	Air District reviews Final Reimbursement Request. Once approved, the remainder (up to 15%) of the grant award will be issued to the Grantee/Project Sponsor.

*The Air District may allow limited partial reimbursements at its discretion for completed sites. The Air District may also consider larger Initial Reimbursement Requests (>85%) on a case-by-case basis.

Once all funded equipment has been installed and is available for public use, the following supporting documents are required to be submitted as part of the reimbursement request:

- Project invoices (charging station hardware, electrical work, labor, materials, etc.);
- Proof of payment for all invoices (copies of cancelled checks or bank statements) that match the amounts on the invoices exactly;
- Proof of EVITP certification;
- Completed [Charge! Program EVITP Form](#) (available on the *Charge!* Program website);
- Details of any additional grants/incentives received (or applied for) for the project;
- Photos of equipment with Air District logo; and
- Documentation that publicly accessible equipment information and location have been uploaded to the [U.S. Department of Energy's Alternative Fueling Station Locator website](#).

OPERATIONAL PERIOD

During this period, the Grantee/Project Sponsor will operate & maintain the charging stations for a minimum of three years and until the usage requirement is met. Until both the three-year Operational Period and usage requirements are met, the Grantee/Project Sponsor is required to:

- Report on the status, usage, and uptime of the project annually to the Air District;
- Provide usage and uptime reports of the project to the Air District upon request;
- Maintain the required insurance; and
- Cooperate with the Air District and its designees on fiscal audits and inspections of the project.

Grantees/Project Sponsors may charge reasonable usage fees to help defray their on-going costs associated with use of electricity, and operations & maintenance. Grantees/Project Sponsors may hire third-party vendors for charging station maintenance; however, please keep in mind that these are not eligible project costs. Charging station operation & maintenance may include but is not limited to availability of customer service channels, procedures for station upkeep, staff training, and station repair and inspection schedule. Grantees/Project Sponsors are responsible for ensuring that the funded charging stations are fully operable for at least 97% of a charging site's standard hours of operation for the duration of the Operational Period.

RECORDS RETENTION

The Project Term extends for three additional years after the end of the Operational Period. The Grantee/Project Sponsor is required to maintain all Project records, such as fiscal records and charging station usage and uptime records, in a centralized location for three additional years after the end of the Operational Period. The Grantee/Project Sponsor is encouraged to continue maintaining and operating the funded charging stations after the end of the project term, although it is no longer a contractual requirement to do so.

FUNDING SOURCES

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. The Air District may use other funding sources to support this program if available and project details and demand align with the requirements for the other funding sources.

WEBINAR

The Air District ~~will~~ conducted one webinar for the solicitation. The webinar ~~will~~ provided an overview of this solicitation and covered Charge! Program Requirements, the application process and evaluation criteria, and Grantee/Project Sponsor's administrative requirements. A recording of the webinar ~~will be made~~ is available on the [Charge! Program website](#).

~~When: Nov 29, 2022, 10:00 AM to 11:30 AM Pacific Time (U.S. and Canada)~~

~~Topic: FYE 2023 Charge! Program Webinar~~

~~Register in advance for this webinar: https://us02web.zoom.us/webinar/register/WN_6svTXGHJSW600SfGyDx7Yg~~

QUESTIONS

Once the application period starts on November 15, 2022, prospective applicants can request meetings with Air District staff to discuss proposed projects. Staff may not be able to accommodate all requests, but will prioritize all meeting requests from community groups and applicants working on multi-family housing projects. Written questions will be accepted by email until February 15, 2023, and should be sent to charge@baaqmd.gov (subject "RE: Charge! Program"). Responses to questions will be posted to the [Charge! Program website](#) periodically. Questions will also be answered during the scheduled webinar.

INSURANCE GUIDELINES

Grantees/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 Grantee/Project Sponsor provides documentation showing that the Grantee/Project Sponsor meets the following requirements for each of its projects:

- Liability Insurance with a limit of not less than \$1,000,000 per occurrence. Such insurance shall be of the type usual and customary to the business of the Grantee/Project Sponsor, and to the operation of any portion of the Project; and
- Property Insurance in an amount of not less than the insurable value of Project Equipment funded under the Funding Agreement, and covering all risks of loss, damage or destruction of such equipment.
- Workers Compensation Insurance as required by California law and employers' liability insurance with a limit not less than \$1,000,000.

Acceptability of Insurers: Insurance is to be placed with insurers with a current A.M. Best's rating of not 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.

AIR DISTRICT GRANT & INCENTIVE PROGRAMS

In addition to the *Charge!* Program, the Air 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
Locomotives
Marine Vessels
Lower-Emission School Buses

Shuttle, Ridesharing, and Vanpools
Light-Duty Vehicles
Bikeways and Bike Parking
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 at:

[Air District Grants Programs](#)

Email: grants@baaqmd.gov

Grants Information Request Line: (415) 749-4994

OTHER FUNDING OPPORTUNITIES FOR LIGHT-DUTY ELECTRIC VEHICLE INFRASTRUCTURE

In addition to the *Charge!* Program, other opportunities for charging station funding may be available from other organizations. Applicants are encouraged to explore all opportunities and select the one(s) that works best for them. *Charge!* Program funding may be combined with funding from other grant programs. If projects are co-funded with multiple funding sources, it is the responsibility of the applicant to ensure all requirements and deliverables are met.

- **[California Electric Vehicle Infrastructure Project \(CALeVIP\)](#)**: CALeVIP provides incentives for EV charger installations and works with local partners to develop and implement projects that meet current and future regional EV needs for DC Fast charging.
- **[California Energy Commission CHILL-2](#)** - \$24,000,000 total available for Level 2 EV charger installations.
- **[Community Choice Aggregation \(CCA\)](#)**: CCAs may offer rate payers incentives for both electric vehicles and charging stations. Please contact your local CCA.
- **[Inflation Reduction Act \(IRA\) of 2022](#)** - Newly installed EV chargers can claim a tax credit of up to 30% of the cost of the installation and equipment or \$100,000, whichever is less.

- **Low Carbon Fuel Standard (LCFS):** Project Sponsors may qualify for LCFS credits to help offset the cost of operating the charging stations.
- **PG&E EV Fast Charge Program:** PG&E pays for and manages construction of the electrical infrastructure from the utility pole to the parking space at a limited number of competitively selected sites. Sites that meet Disadvantaged Community (DAC) requirements may qualify for a rebate up to \$25,000 per charger to offset the EV charger cost.
- **Tesla Destination Charging:** For Project Sponsors interested in hosting Tesla charging stations.

DEFINITIONS

Affordable Housing: units at a multi-family housing site that have a rent or mortgage payment that is no more than 30% of the monthly household income for a “Low Income” Household per the California Department of Housing and Community Development’s [State Income Limits for 2022](#).

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. Charging stations funded by the Charge! Program can fall into one of three categories:

- **Direct Current (DC) Fast Charging Station:** Uses an external charger, and supplies electricity in the form of direct current at a rate of 50 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.

Connector: A connector is what is plugged into a vehicle to charge it. Multiple connectors and connector types (such as CHAdeMO and CCS) can be available on one EVSE port, but only one vehicle will charge at a time. Connectors are sometimes called plugs.

Disadvantaged Communities (DACs): Communities disproportionately burdened by multiple sources of pollution as identified in the California Communities Environmental Health Screening Tool CalEnviroScreen Version 4.0 developed by the California Environmental Protection Agency’s Office of Environmental Health Hazard Assessment. Census tracts in the top 25% of CalEnviroScreen 4.0 scores are prioritized for this program.

- [CalEnviroScreen 4.0](#)
- [California Priority Populations Map](#)

Electric Vehicle Infrastructure Training Program (EVITP): Training and certification program for electricians installing EVSE.

EVSE Port: Per the U.S. Department of Energy,⁵ an EVSE port provides power to charge only one vehicle at a time even though it may have multiple connectors. The unit that houses EVSE ports is sometimes called a charging post, which can have one or more EVSE ports.

Executed Funding Agreement: Contract that has been signed by both the Grantee/Project Sponsor and the Air District and contains all terms and conditions for the approved project. Funding Agreements are typically sent to the Grantee/Project Sponsor for execution within 60 days following the Notice of a Proposed Award. **Projects that commence (e.g., pre-order equipment, begin construction) prior to receiving the executed Funding Agreement will be disqualified from receiving grant funding.**

⁵[Alternative Fuels Data Center, Charging Infrastructure Terminology](#), November 2021.

~~ISO 15118-3: An ISO 15118-ready charger is capable of powerline communication as outlined in ISO 15118-3, secure management and storage of keys and certificates, TLS version 1.2 (additional support for TLS 1.3 or subsequent versions is recommended), and connecting to a backend network. Charging providers will be responsible for completing a self-attestation that their hardware supports these capabilities. CEC recommends that manufacturers self-test for ISO 15118-3 conformance using tests defined in ISO 15118-5. ISO 15118-ready chargers must be capable of remotely receiving updates to activate or enable ISO 15118 use cases. ISO 15118-ready chargers must be capable of selecting the appropriate communication protocol used by the vehicle. For DC Fast chargers, this hardware guideline would apply to DC Fast chargers featuring a CCS connector (including multiple-port chargers with at least one CCS connector), and would not apply to those using only a CHAdeMO connector.⁶~~

~~OCPP 2.0.1: Open Charge Point Protocol (OCPP) is a protocol developed by the Open Charge Alliance that enables the charger management software integration between EVSE from different manufacturers.~~

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 Sponsor or Grantee: The entity responsible for meeting all obligations of the executed Funding Agreement.

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.

Qualifying facility: Charge! Program-funded equipment may only be installed at the following facility types:

- **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-family Housing Facility:** A dwelling consisting of four or more units. Single-family (household) residences and multi-family housing with less than four residential units are NOT eligible. Projects that are public and at affordable housing sites or below market rate housing sites will be prioritized.
 - Charging stations must be located at a multi-family housing; however, chargers located within close proximity to a multi-family housing building that serve its residents will be considered on a case-by-case basis at the Air District's discretion.
 - Curbside charging to support multi-family housing locations are eligible, but may be subject to approval by the local jurisdiction.
 - Charging stations installed at multi-family housing may be public or private; however, private chargers must be accessible to more than one resident of the facility.
 - Assigned parking and deeded parking spaces are only eligible at Level 1 charging stations or Level 2 charging stations at affordable housing sites, on a case-by-case basis.
 - Ubiquitous assigned charging stations at multi-family housing sites may also be considered for funding on a case-by-case basis. "Ubiquitous assigned" means that all parking spaces at the multi-family housing site are assigned, and that all parking spaces will have a charging station.
 - Assigned and deeded parking at all other facility types are ineligible.
- **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.

⁶California Energy Commission, ISO 15118 Charger Communications and Interoperability Workshop, November 2021

- **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. At the Air District's discretion, charging stations for private fleets may be exempt from public accessibility requirements.

Religious institutions are not eligible to apply and grant funds may not be used to install equipment on property belonging to or operated by religious institutions.

Uniform Commercial Code (UCC): California UCC Financial Statement is used to secure the interests in the project that has been purchased partially or entirely with funding provided by the Air District.

Usage Requirement: The anticipated three-year charger usage provided by the Grantee/Project Sponsor in their application based on the number of proposed charging ports, facility type(s), number of parking spaces, and other contributing factors. Usage is evaluated in aggregate on a project basis by summing the kWh delivered by each funded charging station during the entire Operational Period. The Usage Requirement will be listed in the Funding Agreement. Projects that do not meet their stated usage may be in breach of the Funding Agreement and subject to repayment.