



BAY AREA AIR QUALITY MANAGEMENT DISTRICT



Application Guidance Document

CHARGE!

For Fiscal Year Ending (FYE) 2021

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 AND PRIVATE CHARGING STATIONS AT MULTI-UNIT DWELLING LOCATIONS 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) AND MOBILE SOURCE INCENTIVE FUND (MSIF).

The deadline for receiving applications for Charge! is 4 PM, March 18, 2021.

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

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DEFINITIONS

AB617: Assembly Bill 617 (AB617) authorized in 2017, directs the state, in consultation with local air districts, to select communities that have a high cumulative exposure burden to air pollution. Once selected, these communities will work with the local air districts on community emission reduction programs and/or air quality monitoring campaigns. The following are selected communities or future communities for consideration in the nine-county Bay Area:

Table 1: Bay Area Air Quality Management District AB617 Communities and Future Communities for Consideration

West Oakland	Richmond-San Pablo	East Oakland/ San Leandro	Eastern San Francisco
Pittsburg-Bay Point	San Jose	Tri-Valley area	Vallejo
For more information on AB617, please visit the Community Health Protection Program webpage at https://www.baaqmd.gov/community-health/community-health-protection-program			

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). 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 Sponsor: 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! funded equipment may only be installed at the following locations:

- **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-unit Dwelling Facility:** A dwelling consisting of 5 or more residential units. Proposed charging station(s) will be located at or within close proximity to the multi-unit dwelling and are accessible to multi-unit dwelling 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 multi-unit dwellings with less than five residential units are NOT eligible. Curb-side parking spots to support multi-unit dwelling locations are eligible but are subject to approval by the local jurisdiction.*

- **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.
- **AB617:** Projects located at multi-unit dwelling facilities and within the boundaries of a selected or future AB617 community under consideration.

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 summing the kWh delivered by each funded charging station during the whole operation period. Usage requirements are listed in Table 1.

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) emitted^{1,2} 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/ technologies.

In December 2013 The Air District, in collaboration with its partners (Metropolitan Transportation Commission (MTC), Association of Bay Area Governments (ABAG), Bay Area local government agencies, and other 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 established adoption goals of 110,000 PEVs on Bay Area roads by 2020, and 247,000 by 2025. These goals are aligned with the state's goals of 5 million 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 (ICE) vehicles. The EO specifically bans the sale of light-duty ICE vehicles for most operational uses.

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

² *ibid.*

TRANSPORTATION FUND FOR CLEAN AIR (TFCA) & MOBILE SOURCE INCENTIVE FUND (MSIF)

Transportation Fund for Clean Air - 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.

Mobile Source Incentive Fund - In 2004, the California State Legislature authorized the Air District to impose a \$2 surcharge on motor vehicles registered within its jurisdiction. The revenues generated by the additional \$2 surcharge may be used to support projects eligible under the Carl Moyer Program and for funding of alternative fuel and electric infrastructure projects.

CHARGE! PROGRAM

Charge! is a TFCA and MSIF-funded grant program that helps offset up to 90% of the cost of purchasing and installing new publicly available charging stations at qualifying facilities and private charging stations to serve multi-unit dwelling locations [within the Air District's jurisdiction](#). Funding is available on a competitive 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 FYE2021 Charge! cycle prioritizes projects located at multi-unit dwelling, AB617 communities and in regions with lower EV charger density will receive higher prioritization. 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 and/or may be ranked lower.***

MANDATORY PRE-APPLICATION WEBINAR AND WEBINAR SCHEDULE

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, December 17, 2020**
10:00 to 11:00 AM ([Register](#))
- **Thursday, January 14, 2021**
1:00 to 2:00 PM ([Register](#))
- **Thursday, February 11, 2021** (Added 1/26/21)
1:00 to 2:00 PM ([Register](#))
- **Tuesday, March 2, 2021** (Added 1/26/21)
1:00 to 2:00 PM ([Register](#))

~~Based on demand, additional webinars may be scheduled in the future.~~ **The final webinar will be held on March 2, 2021.** (Added 1/26/21) 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 to sign up for email alerts and for Program updates.

HOW TO APPLY

Charge! applications will be completed and submitted through the Air District's online application system - www.baaqmd.gov/charge. Applicants are encouraged to review and reference the Fluxx Application User Guide which describes the

online application process. Please contact ~~Mark Tang, Staff Specialist~~ by email at mtang@baaqmd.gov climatetech@baaqmd.gov (Added 1/26/21) (subject "RE: Charge! Program) for assistance with application submittal.

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 \$6,000,000 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 2nd Solicitation round if no sufficient project is found in 1st 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 Air District discretion.

FUNDING OPTIONS

Each eligible charging station in a Charge! project can receive the pre-determined amount of funding specified in Table 2 for TFCA and Table 3 for MSIF 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). TFCA and MSIF funding cannot be combined or stacked together for a charging station. Each facility type can only utilize one funding source. Applicants are not required to identify funding sources. Air District staff will assign eligible projects to the specific funding source as part of the evaluation/ scoring process.

TFCA FUNDING

Funding for projects at workplace, destination, transit parking, multi-unit dwelling or transportation corridor facilities:

Table 2: TFCA Award Amount for Each Charger-Type and Key Charger Requirements for projects located at transit parking, multi-unit dwelling, workplaces, transportation corridors and destination facilities

TFCA BASE FUNDING				
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
Minimum Usage Requirement (over 3 years) per Station* (added 1/26/21):	5,625 kWh	11,250 kWh	22,500 kWh	90,000 kWh
TFCA PLUS UP FUNDING				
<i>Charge! also offers TFCA Plus-Up funding, on top of Base funding, for projects who meet one or more of the following:</i>				
Dual-port Level 2's	NA	\$1,000		NA
Dual-port Level 2 Additional Usage Requirement (over 3 years)	NA	5,100 kWh		NA

Solar Power**	\$1 for every watt of solar capacity newly installed, up to \$4,000			
Transportation Corridor Facilities	NA	NA	NA	\$7,000
Multi-Unit Dwellings**	\$750	\$2,000	\$4,000	NA

* These usage requirements represent the anticipated usage per charger that should be planned for during project scoping. During project implementation, usage is evaluated in aggregate on a project basis by summing the kWh delivered by each funded charging station during the whole operation period. (Added 1/26/21)

** Multi-Unit Dwelling Plus-Up cannot be combined with Solar Power Plus-Up (for an entire project).

TFCA Plus Up Requirements:

- **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 27,600 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-Unit Dwellings:** Charging stations installed at multi-unit dwelling facilities are eligible for an additional Plus-Up funding for each qualifying charger installed as detailed in Table 2.

Note: the total award (TFCA Base and TFCA Plus-Ups) may be reduced based on project proposals and at the Air District’s discretion.

MSIF FUNDING

Funding for projects at multi-unit dwelling located within AB617 communities:

Table 3: MSIF Base Award Amount for Each Charger-Type and Key Charger Requirements for projects located at Multi-Unit Dwelling and AB617 communities

Charging Station Type:	Level 1	Level 2	DC Fast
Max. Base Funding per Station:	\$1,500	\$8,000	\$25,000
Minimum Usage Requirement per Station:	Usage/ utilization in kWh to be estimated by the Project Sponsor in application		

GENERAL APPLICATION ELIGIBILITY & 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. No equipment is to be ordered and no work is to begin on a project until a fully executed contract between the Air District and the grantee is in place. No costs or financial commitments that are incurred or undertaken prior to the date of full execution of the contract will be considered for reimbursement from the Air District. Air District Board approval does not guarantee funding. Only a fully executed contract constitutes an obligation for the Air District to fund a project.

- **Projects must qualify for at least \$1,000,000* in Charge! funding**— Grantees who modify the scope of their project post-award in any way that reduces their award to below the \$1,000,000 threshold may have their entire project and award cancelled. Grantees 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-unit dwelling locations must qualify for at least \$10,000 in Charge! funding.
- **Applicants must be in “good standing”**, 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.
- **No single applicant may receive more than \$3,000,000 in Charge! 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. 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. Facilities may fall into one or more of the following categories:

- Destination Facility
- Multi-unit Dwelling Facility
- Transit Parking Facility
- Transportation Corridors Facility
- Workplace Facility
- AB617 Facility

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 2). 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. Charging station located at multi-unit dwellings, multi-unit dwellings in AB617 communities, and to support private fleets 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 4: 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 & SAE Combo***
Output Rating Requirement:	1.4 KW	3.3 – 6.6 KW	6.6+ KW	40+ KW

* Level 1 charging stations at:

- Multi-Unit Dwelling, 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 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.

***Minimum 1 CHAdeMO connector at each site location. (Added 1/26/21)

GRANTEE/PROJECT SPONSOR OBLIGATIONS

The Air District will bring selected project to the BAAQMD Board of Directors for consideration and will then enter into contracts for the selected project(s). Contracts will include requirements for: project schedule, deadlines, funding award amount, project scope, performance requirements/ penalties, monitoring and reporting, payment procedures, recordkeeping, termination, repayment, etc. The following are some of the requirements Grantees (“Project Sponsors”) must agree to and do to participate:

- Pay 100% of up-front costs (prior to reimbursement), all costs in excess of the grant amount, and provide at least 10% 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 specific contractor(s) to 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;
- Identify and implement a mechanism to accurately track charging station usage in 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);
- 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.

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 TFCA 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;
- Environmental review;
- Maintenance, repairs and operations, such as cost of electricity (utility) and network fees;
- Administrative costs: accounting for Program funds, fulfilling contractual obligations, audits, reporting and record-keeping requirements specified in the Funding Agreement and in-house contractor or labor expenses; 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 phases. The activities and milestones for each of the phases are described below.

SOLICITATION & PROJECT MILESTONES

Table 5 describes the major milestones and the project sponsor journey, including the reimbursement schedule. Rows highlighted in amber indicate reporting requirements.

Table 5: Solicitation & Project Milestones

DATE	ACTIVITY
December, 2020	Program solicitation released
March 18, 2021	Application deadline (solicitation closes)
EVALUATION PHASE	
April – June, 2021 All projects will be ranked and selected projects awarded	<ul style="list-style-type: none"> • Air District notifies applicant about its determination (Notice of Proposed Award) and a proposed Funding Agreement is sent for the Project Sponsor’s signature

	<ul style="list-style-type: none"> 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
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INSTALLATION PHASE	
Within 12 months of the Funding Agreement being executed	All charging stations must be installed and operating
Every April 15 and October 15 during the Installation Phase	Project Sponsor submits status reports to the Air District

OPERATION PHASE	
Operation Phase (minimum 3 years after all charging stations have been installed and are operational)	<ul style="list-style-type: none"> Project Sponsor must maintain and operate the charging stations Air District may conduct inspections and/or fiscal audits
Every March 1 during the Operation Phase	Project Sponsor submits annual reports to the Air District

RECORDS RETENTION	
For 3 years beginning upon completion of the Operation Phase	Project Sponsor must maintain all records in a centralized location

APPLICATION PHASE

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

- 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).
- 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 PHASE

Project applications will be reviewed, scored and competitively ranked for recommendation. Applications will be accepted through the Air District’s online application portal. 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 6** 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 6: Application Evaluation Criteria and Scoring

Evaluation criteria	Possible points
Project details & implementation plan <ul style="list-style-type: none"> • Project scope/ details • Partners/ community support • Location/ facility type • Public accessibility • Technology type • Availability/ access to other incentives 	25
Project benefits <ul style="list-style-type: none"> • # of units to be implemented • # of units per county and facility type • Estimated emissions reductions • Cost-effectiveness • AB617 community, location priority analysis 	30
Readiness <ul style="list-style-type: none"> • Resources available • Readiness for implementation • Project timeline 	15
Qualifications <ul style="list-style-type: none"> • Applicant experience/ history • Partners' roles and experience • Community support • Local/ Green business • Minority Business Enterprises (MBE)/ Women's Business Enterprises (WBE) 	10
Budget <ul style="list-style-type: none"> • Itemized equipment and infrastructure cost • Co-funding/ match • Cost per port installed • Total funds requested 	10
Application completeness	10
Total Points Possible	100

Once applications are scored and ranked, the Air District will allocate funding to support the highest scoring projects until funding is exhausted. 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 Funding Agreement to Project Sponsors for execution.

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 & REIMBURSEMENT

During this phase, the Project Sponsor has a maximum of twelve months to purchase and install the selected charging stations. The Project Sponsor is required to report to the Air District the status of the project every six months. The Installation Phase 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 Project Sponsor on a reimbursement schedule as described in Table 7 below.

Table 7: Reimbursement Schedule & Expenditure Report

DATE		ACTIVITY
REIMBURSEMENT SCHEDULE		
Projects awarded over \$1,000,000	Within 6 months of the Funding Agreement being executed	Operation Phase Reimbursement Request for facilities that have completed installation and are operational, up to 85% of the grant award
Projects awarded between \$10,000 and \$1,000,000	Within 60 days of all equipment installed and operational	Operation Phase Reimbursement Request for facilities that have completed installation and are operational, up to 85% of the grant award
For each Operation Phase Reimbursement Request		Project Sponsor submits expenditure report to the Air District
All projects	After a minimum of 3 years operation and meeting the usage requirement	Final Reimbursement Request for the remaining 15% of the grant award

The following supporting documents are required to be submitted for reimbursement:

- Report documenting equipment has been installed and is operational, equipment serial numbers & operational information
- Project invoices and proof of payment and deposit
- Photos of equipment with Air District logo
- Documentation equipment information and location has been uploaded to the Department of Energy's Alternative Fuel Database

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.

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.

ADDITIONAL INFORMATION AND QUESTIONS

Program webinars will be held to provide an overview of this solicitation and answer questions from interested parties. **Written questions will be accepted by email until Wednesday, February 24, 2021**, and should be sent to mtang@baaqmd.gov climatetech@baaqmd.gov (Added 1/26/21) with the subject line "RE: Charge! Program." Responses to all of the written questions received will be collected and posted on the Program website throughout the Program solicitation and no later than March 3, 2021 at: www.baaqmd.gov/charge.

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.

OTHER AIR DISTRICT GRANT & INCENTIVE PROGRAMS

In addition to the *Charge!* 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

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 funding charging stations may be available from other organizations. 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. If projects are co-funded with multiple funding sources, it is the responsibility of the applicant to ensure all requirements and deliverables are met.

- **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/>

- **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 Level 2 and DC fast charging. CALeVIP is available in Sonoma, San Mateo and Santa Clara counties. For more information: <https://calevip.org/>
- **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>.
- **California VW Mitigation Trust Fund Program – Light-Duty Zero-Emission Infrastructure, Electric:** \$5 Million in funding from this program will be available to help accelerate electric vehicle adoption by expanding and filling gaps in California’s charging network. This solicitation will open in early 2021 and projects will be selected on a competitive basis. To sign up to receive email alerts about this program visit: <https://www.surveymonkey.com/r/CaliforniaVW>. For more information about this program, please visit: <https://www.californiavwtrust.org/ev-infrastructure/>
- **Tesla Destination Charging:** If you are interested in hosting Tesla charging stations, please visit <https://www.tesla.com/charging-partners>.