



San Joaquin Valley Plug-In Electric Vehicle Coordinating Council

Date: Thursday, July 11, 2013
Time: 1:30 p.m. – 3:30 p.m.
Location: SJVAPCD Fresno Office
1990 E. Gettysburg Ave.
Fresno, CA 93726

Teleconference information: Call-in: 646-364-1285 Access Code: 6619701

Video Teleconferencing at the following locations:

<u>Modesto</u>	<u>Bakersfield</u>
4800 Enterprise Way	34946 Flyover Court
Modesto, CA 95356	Bakersfield, CA 93308

July 11, 2013 Meeting Agenda (+ next to an item indicates an attachment)

1. Welcome and Introductions (Nhia Vu, SJVAPCD)
2. Announcements and Public Comments (All)
- +3. Summary of June 10, 2013 Meeting (Jessica Jinn, CCSE)
 - A. EVSE 101
 - B. EVSE at Multi-Unit Dwellings (MUDs)
 - C. EVSE Installation & Inspection Guidelines
4. Plans to attract PEV manufacturing, production, infrastructure, and services of PEV development in the region
 - UPS and its EV delivery truck program
 - Electric Vehicles International, an electric vehicle manufacturer based in Stockton, California
 - SJV PEVCC member feedback and discussion
- +5. Public agency EVSE installations (SJVPEVCC members and Tyler Petersen, CCSE)
 - City of Lodi public EVSE installations (Rob Lecher, Lodi Electric)
 - Review request for proposal (RFP) template for public agencies interested in EVSE
 - SJV PEVCC member feedback and discussion
- +6. Regional planning for public EVSE siting (SJVPEVCC members and Tyler Petersen, CCSE)
 - Introduce UC Irvine's model for siting PEV infrastructure
 - SJV PEVCC member feedback and discussion
7. Barrier topics for August 2013 meeting
 - Promotion of PEVs in government fleets
 - Leveraging renewable energy in PEV charging
 - Training and education for car dealerships

The next SJV PEVCC meeting is scheduled for August 1, 2013, 1:30pm to 3:30pm

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June 10, 2013 MEETING SUMMARY

ATTENDEES:

Central Office Attendees:		
CCSE	City of Visalia	City of Fresno
Tyler Petersen	Betsy McGovern-Garcia	Joseph Oldham
SJVAPCD	SJVAPCD	SJVAPCD
Nhia Vu	Colette Kincaid	Juan Cano

Conference Call Attendees:		
City of Lodi Electric Utility	Turlock Irrigation District	Tulare Irrigation District
Rob Lechner	Chris Polley	Jason Waters

Agenda Notes:

ITEM #1: WELCOME AND INTRODUCTIONS

Nhia Vu, San Joaquin Valley Air Pollution Control District (SJVAPCD), welcomed the group to the fifth San Joaquin Valley Plug-in Electric Vehicle Coordinating Council (SJVPEVCC) meeting. Ms. Vu opened up the meeting for introductions for all attendees on the phone, as well as those at the Fresno, Modesto and Bakersfield District offices. Tyler Petersen, California Center for Sustainable Energy (CCSE), gave introductions via video-teleconference from San Diego.

ITEM #2: ANNOUNCEMENTS AND PUBLIC COMMENTS

There were no announcements or public comments.

ITEM #3: SUMMARY OF MAY 2, 2013 MEETING

Tyler Petersen, California Center for Sustainable Energy (CCSE), stated that there have been no changes made in the presentation from the May 2, 2013 meeting and a copy of the presentation can be found online.

A. Workplace Charging

It was decided that Electric Vehicle Supply Equipment (EVSE) permitting needs an easier application process in which permit fees can be waived in order to spur adoption. The City of Merced has this type of easy application and it was successful. The PEVCC members agreed on its importance.

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B. Updating Building Codes

PEVCC members offered recommendations for building code updates. Members said that the number of dedicated spots required by building codes needs to be more flexible. In the case of energy solutions, the group reviewed the regional perspective for working group comments. One member stated that the Governor's Office of Planning and Research (OPR) will address the issue of energy solutions.

ITEM #4: EVSE 101

Two-way communication with EVSE, which entails knowing the maximum current that a charger can provide and the maximum current a car can receive, has been standardized in the industry with the use of the Society of Automotive Engineers (SAE) J1772 plug.

- Juan Cano, San Joaquin Valley Air Pollution Control District (SJVAPCD), said that every charger he sees has an SAE J1772 plug. Mr. Cano further stated that the two-way communication that happens is clear when looking at Pacific Gas and Electric (PG&E) usage, in which demand is not flat but, rather, based on the demand of the car's battery at that moment in time.
- Betsy McGovern-Garcia, City of Visalia, asked how the data is transmitted to PG&E. She is not sure whether or not Southern California Electric (SCE) can do the same thing. Joseph Oldham, City of Fresno, responded that he does see a charger at his house that does provide feeds to SCE.
- Mr. Petersen asked whether or not any other group member had questions about the EVSE two-way communication process; there were no further questions.
- Mr. Petersen continued to ask group members whether or not there has been a need for more education within the utility, a phone participant answered that there have been no questions from employees, but in terms of public usage, consumers don't need more education because they just plug in and go. He further states that when public charging happens more often, charging stations will need to develop a placard or create better signage.
- Chris Polley, Turlock Irrigation District, added that employees are well-informed and have no questions. The biggest problem to date is funding and whether or not the utility can implement it. So far, there is no pro or con for customers.
- Colette Kincaid, SJVAPCD, stated that public charging is available at the office. There are no issues or questions from employees or board members, nor are there problems or questions from consumers or customers. It seems that people are well-educated about the system because they have read the vehicle manual.
- Mr. Oldham agreed with Ms. Kincaid and stated that EV owners are sophisticated when it comes to learning about the technology. Owners who buy EVs have to dive into the owner's manual and learn the features. Mr. Oldham stated that cars demand education of its owners. The next step will be educating consumers about the advantages of charging infrastructure and cost savings. The more developed it becomes, the convenience of plugging in will be important wherever you go.

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- Mr. Petersen then asked what the specific numbers are in terms of cost savings with charging infrastructure. Mr. Petersen emphasized that cost savings depends on location and on the utility. Cost savings calculators can be found on CCSE's website and the group was encouraged to direct people to the CCSE website and share links to educate consumers. The cost savings calculator is very convenient and effective for getting basic numbers.
- The group decided that the most important factors when discussing EVSE are the following:
 - Typical charging rate differentiation between Level 1, Level 2, and DC Fast Chargers. Specifically, Level 2 chargers are floor mounted and wired through the base. This is more intensive and requires the elimination of concrete to wire through the ground.
 - Wall and poll mounts. These are flexible ways to set-up EVSE because it takes up less space.
 - Ceiling mounts. These types of mounts minimize the hazard of tripping, but needs more space and capacity to mount in the ceiling.
- Mr. Petersen asked which mounting method is most applicable to the region and whether or not more education would increase the usage.
- Mr. Oldham responded that private property owners are interested in all methods of mounting and are interested in its flexibility. Mounting also depends on the property.
- The group decided that the big question is where these chargers will be placed. The style of the equipment is not as important as placing EVSE where they are most needed.
- Mr. Oldham delineated the places where EVSE would be most needed. In terms of retail (such as malls, stores, movie theaters, etc.), it depends on the amount of time a person will be spending in these locations. In places where they are going to spend a lot of time, a consumer needs at least 2 hours of charges to make it worthwhile to even plugin. A Level 2 charger would not be able to give significant charge in a matter of fifteen minutes. Mr. Oldham suggested that Level 2 EVSE could be installed at hospitals where the average length of time for a visit is two to three hours. Further, installing EVSE at hotels and airports is a big opportunity.
- Ms. Kincaid added that the industry and various developers are also quite interested. They have the same concern that EVSE must be used for one or more hours to be worthwhile. Good locations would be shopping centers, places where EV owners go. Ms. Kincaid also notes that putting EVSE at railroads doesn't make sense. They have to be clearly seen so that they do not get vandalized.
- Rob Lechner, City of Lodi Electric Utility, said that the biggest issue for utilities is putting transformers in a place that can accommodate the load. For instance, a city block with multiple chargers could cause some issues. Coordination of charger locations is key; it is important to ensure that transformers do not get overloaded and preparation is key to avoid this potential problem.
- Mr. Petersen stated that if host sites are interested in DC fast charging, corridors are important locations and asks if utilities could accommodate such placements.
- Mr. Lechner replied that as long as there is enough advanced planning in terms of load calculations, utilities can accommodate such a load.
- Mr. Oldham commented that there is an issue with charging. Some cars are programmed not to charge at on-peak hours because it is a disincentive to charge during that time frame. But, these cars

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can also be changed to charge at other times as well. Utilities need to take a bigger role in incentivizing owners to charge during off-peak hours.

- Mr. Lechner commented that the City of Lodi has an EV rate charging tariff. The incentive to charge off-peak is 33 cents per kilowatt hour. If a flat rate were set, it would be about 1-2 dollars per hour.
- The group shared concerns about non-EVs parking in EV-designated parking spots. One group member commented that if that is the case, there are penalties to be faced and a car may be towed.
- Jason Waters, Tulare Irrigation District, commented that non-EVs park in clean air vehicle designated parking spots because the spots are in good locations.
- Ms. Kincaid stated another issue in that an EV stays plug in for days at certain locations rather than charging and moving when the charge is complete in a few hours. Ms. Kincaid proposed that this situation can be enforced by charging EVs for staying plugged-in for longer than needed.
- Mr. Oldham commented that handicap parking experiences similar problems. People have been parking in handicap spaces and EV-designated spots as well.
- Mr. Petersen noted that there is already a sample ordinance in the plan concerning parking and it can be disseminated to the group.
- The group noted that both CHAdeMO (Japanese) and SAE international J1772 plugs allow for faster charging. These two plugs have been approved by Chrysler, Ford, GM, Audi, BMW, and Daimler. A rollout of vehicles with the new DC connectors begins in 2013 starting with the Chevy Spark.

Charging network memberships

The group noted that right now you need an individual charging membership card for each brand of charging stations, each company has a separate card. There is discussion on the state-level for streamlining this system and having a universal card system.

The following are comments and concerns that the group presented:

- Mr. Oldham agreed that to encourage people to charge and use EVs, one card is needed. Mr. Oldham comments that people will not want to go through the process to apply for multiple cards.
- The group commented that swiping cards need to be easy and stations need better signage. Charging stations have to be similar to gas stations, where it is easy to fuel and easy to use.
- Ms. Kincaid agreed that using charge stations needs to be as easy as using a gas station. Normal credit cards should be used.
- Mr. Petersen commented that though one credit card swipe would be easy, charging station companies need to have more control in order to have a network and operate it properly.
- Mr. Oldham commented that some gas stations will accept debit so that an extra fee won't be charged; something similar can happen for charging stations.
- The group agreed that if 1.5 million EVs are going to be on the road, the public must have easy access to charging.

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- Mr. Petersen commented that Ecotality and ChargePoint have a collaborative card that can be used at both stations.

ITEM #5: REGIONAL PEV READINESS PLAN DEVELOPMENT

A. EVSE at Multi-Unit Dwellings (MUDs)

Currently, there is no one specific definition of multi-unit dwelling. It pertains to anything from condos to mobile homes, everything that is not a single family home. Mr. Petersen asked for a working definition of MUDs for the region.

- Mr. Oldham commented that the issue regarding multi-unit dwellings is not how many units it has but the number of parking spots. Mr. Oldham added that EV parking and charging issues vary depending on the structure and set-up of the parking lot. Dedicated and shared lots have their own needs and challenges. Mr. Oldham commented that common parking lots have exposed charging units, which become a target for misuse.
- Ms. McGovern-Garcia commented that it is not worth-while to define multi-unit because each city's building codes already have it defined.
- The group agreed that property managers will need guidance on how to handle issues regarding installing and using EVSE on certain parking spots.
- Mr. Petersen noted the general challenges that are being encountered include wiring, panel upgrades, spots are far away from the power supply, and electricity rates. Mr. Petersen further asked the group how charging should be handled for a multi-unit dwelling parking lot.
- Mr. Lechner responded that having a property manager install a paid for use meter would be an optimal solution.
- Mr. Lechner added that having a charging station in a common area would only experience low loads and non-EV owning residents may not want to help pay for the equipment.
- Ms. McGovern-Garcia commented that the group should explore similarities between solar projects and EV charging installations and compare metering methods and tariffs between EVs and solar.
- Mr. Oldham responded to Ms. McGovern-Garcia says that it all depends on the tariff that is being investigated. It is case-specific and depends on each utility and their rate structures.
- Ms. McGovern-Garcia further responded that rates need to be comparable in regards to tax credits for multi-unit properties because of low income issues of those who generally live in MUDs.

B. EVSE Installation & Inspection Guidelines

- Mr. Petersen presented the group with a slide delineating installation guidelines from the U.S. Department of Energy PEV Handbook.

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- Ms. Kincaid commented that the diagram should incorporate this into the plan and that it should stress to people that contacting the utility is important even with a Level 1 charger for load protection.
- Mr. Oldham commented that the consumers should make the utility perform a rate analysis to show that there is an advantage to being on an EV rate versus a regular rate. Mr. Oldham added that for Level 1, utility notification gives consumers a rate advantage and utility notification is required for Level 2 chargers.
- Mr. Petersen asked if it is better if the owner or local jurisdiction contacts the utility.
- Mr. Lechner responded that the community developer will meet with the permitting department and the contractor at first and it is best to add the utility into that initial conversation. During the set up time the community developer will meet with the permitting department and contractor, it's best to start with the utility as well.
- Mr. Cano commented that the option to choose Level 1 or Level 2 should be added to the initial chart.
- Ms. McGovern-Garcia commented that the city in general is not involved in issues between the customer and utility.
- Mr. Petersen asked if this is the case for non-residential EVSE installations or public installations.
- Ms. McGovern-Garcia responded that the main issue is to find funding and then to find the best way to install. Ms. McGovern-Garcia added that a dual track approach is best, where you permit with the city and go to the utility concurrently.
- Ms. Kincaid commented that the EVSE supplier should be fit into the diagram. It is as important a part as talking to the utility.
- Ms. McGovern-Garcia agreed that EVSE suppliers need to be talked to first because interested parties need to know cost in order to determine how many to install. Ms. McGovern-Garcia added that talking to EVSE providers is the first step before talking to utility and the city.
- Mr. Oldham commented that in terms of project development costs are very important. The first steps should concurrently be finding funding, equipment options, and site assessment. Non-residential installations also have to consider additional costs.
- Mr. Petersen asked what is the most important consideration for non-residential installations in the region.
- Mr. Polley commented that the utility has been able to develop a handbook of best practices for consumers, which were based on questions customers had presented them with and feedback they got from installers and contractors.
- Mr. Petersen noted that this information is available on the CCSE website
- Mr. Petersen asked if fleet managers will follow the same procedure of charging fleet vehicles at night no matter if they are city-owned or privately-owned.
- Mr. Oldham commented that it would start with the EVSE suppliers and utilities to make sure they are on the right rate because electricity supply is more than adequate.

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- Mr. Petersen asked how EV adoption works in agriculture from a regional perspective.
- Mr. Oldham responded that Fed Ex and UPS have growing EV fleets and the fleets are already out in the region, but other delivery trucks are not.
- Ms. Kincaid commented that the state has HVIP funding for electric trucks and buses, but there should be more incentives for vehicles in the valley. Ms. Kincaid further asked how this idea would work with the infrastructure.
- Mr. Oldham commented that the incentives will be an educational issue and that ride and drives can be a useful tool to get the word out.
- Ms. McGovern-Garcia agreed that expanding knowledge would be advantageous and believes that agriculture will need more time to become adopters of EVs, which is why education is important in order to have them be prepared.
- Ms. Kincaid commented that there have been similar programs with electric pumps and that those in agriculture might be open to EVs and EVSE because they are familiar with other technologies that have turned over to electric applications. Ms. Kincaid further added that incentive amounts have to be worthwhile to the owners.
- Mr. Oldham commented that equipment that is being used around the farm needs to be converted. Consumers in agriculture need to be educated about rates. Mr. Oldham added that for large haulers, the technology has to increase tremendously for them to change and adopt EVs, therefore big steps need to be made in technology for them to switch to EVs.
- Ms. Kincaid noted that because of diversity in the region no industry can be left out and fleet discussions in one group cannot be applied to other categories. It would be good to break out the topic of fleets into different groups.
- The group agreed with Ms. Kincaid.
- Mr. Petersen asked if FedEx is based in Fresno and suggested that installers at FedEx should be sought to include information into the plan.
- Mr. Oldham commented that FedEx may not have had many conversations about the topic, but he has contacts in the company and will find someone there to talk about it.
- Ms. McGovern-Garcia commented that for delivery vehicles, adoption of EVs really varies because of variation of travel distance within the valley. Ms. McGovern-Garcia further added that she would like to hear about efforts happening outside of Fresno.
- Ms. Kincaid commented that even on city-level and university-level there is variation of NEVs and ZEVs. EV fleets vary depending on category. Ms. Kincaid added that there needs to be different fleet types – delivery, campuses, others. It is important not to miss any groups and each needs to be described in detail based on different needs and processes.
- Mr. Petersen commented that for the plan, three different categories should be included: agriculture, delivery and medium duty.

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- Mr. Oldham commented that some of these fleets will be interested in DC fast charging because delivery trucks can stay out longer if DC FC is available. Mr. Oldham noted that Ramona's electric bus fleet is an excellent example of quick chargers being used.
- Mr. Petersen confirmed that that example will be incorporated into the plan.

**San Joaquin Valley Plug-in Electric Vehicle Coordinating Council Best Practice
Agenda Item 5, Attachment 1**

REQUEST FOR PROPOSAL (RFP) TEMPLATE

Installation and Operation of Electric Vehicle Charging Stations

The following is a Request for Proposal (RFP) template that provides recommended headings and proposal language to assist in the issuance of an RFP for Electric Vehicle Charging Stations. In the outline, a brief summary is provided for each heading and this information can and should be customized for each individual RFP. This outline was created based off of information gathered from RFP's drafted by the City of Chula Vista and the City of Long Beach.

Disclosure: *Proposals shall be kept confidential until a contract is awarded. The <insert jurisdiction> reserves the right to request clarification of any proposal term from prospective vendors. Selected vendor(s) will be notified in writing. Any award is contingent upon the successful negotiation of final contract terms. Negotiations shall be confidential and not subject to disclosure to competing vendors unless and until an agreement is reached. If contract negotiations cannot be concluded successfully, the <insert jurisdiction> reserves the right to negotiate a contract with another vendor or withdraw the RFP. Any contract resulting from this RFP shall not be effective unless and until approved by the <insert jurisdiction Council>.*

1. Overview of the Project

Requesting proposals from vendors to fully fund, design, install, operate, maintain, market, and potentially remove electrical vehicle (EV) charging stations, also known as Electric Vehicle Supply Equipment (EVSE), on publically-owned property for public use. This work will also include assisting the jurisdiction in identifying ideal site locations for the EVSE installations.

2. Acronyms/Definitions

A glossary of the necessary acronyms and definitions used throughout the RFP (e.g. "Vendor" – Organization/individual submitting a proposal in response to this RFP)

3. Scope of Project

The Scope of the Project is as follows:

- Provide attractive and well-maintained EVSE.
- Cover all costs associated with installation, maintenance, and electricity for the EVSE. The vendor may establish a service charge and method of payment collection to recoup these costs as well as any operating profit from EVSE users.
- Identify siting locations, including physical address, project site (landmark location), reasoning behind the location selection, and accompanying notes.
- Provide proper EV parking signage and reconfiguration of any parking stalls for EV parking.

- Market the project as well as provide product advertisement.
- Offer options for EVSE when the agreement expires (e.g. charging unit removal, transfer of ownership, contract renewal options).
- The <insert jurisdiction> to provide the required parking spaces to accommodate the EVSE within the parking facilities at no cost to the vendor.

4. Additional Considerations

- A. The vendor must agree to insurance and liability requirements (scope and coverages) set by the jurisdiction and state such in its proposal.

<Jurisdiction to insert summary of applicable insurance and liability requirements here and/or can attach full description to end of this template.>

- B. <Jurisdiction can add any additional considerations here. For example, if City offers/restricts use of advertisements on or around EVSE.>

5. Submittal Instructions

For questions regarding this RFP, submit all inquiries via email to <insert email address> by <insert due date>. Responses to the questions will be posted <insert where responses will be made available> no later than <insert date>. All proposers are recommended to visit the above mentioned <insert jurisdiction> website on a regular basis as responses will be posted when available.

Proposal Evaluation Process Timeline

<u>TASK:</u>	<u>DATE/TIME:</u>
Deadline for submitting questions	<Insert date>
Answers to all questions submitted	<Insert date>
Deadline for submission of proposals	<Insert date>
Evaluation period	<Insert date>
Selection of vendor	<Insert date>

NOTE: These dates represent a tentative schedule of events. The <insert jurisdiction> reserves the right to modify these dates at any time, with appropriate notice to prospective vendors.

Vendors shall submit one (1) original proposal marked “ORIGINAL” and four (4) identical copies to the following:

- <Insert Jurisdiction Name>
- <Insert Contact Name>
- <Insert Address>

Proposals shall be clearly labeled in a sealed envelope or box as follows:

REQUEST FOR PROPOSAL NO.: <insert proposal number>
FOR: Electric Vehicle Charging Stations

Disclosure: *Proposals must be received by <insert date and time>. Proposals that do not arrive by the specified date and time WILL NOT BE ACCEPTED and will be returned unopened. Vendors may submit their proposal any time prior to the above stated deadline. E-mail or fax submissions will not be accepted.*

At its sole discretion, the <insert jurisdiction> may reject incomplete proposal submittals if, in its judgment, the submittal lacks information needed to effectively evaluate the proposal. Nothing in this request for qualifications implies a contractual obligation with any firm, nor will the <insert jurisdiction> reimburse costs for submittal preparation.

Proposal Format:

Vendor Information:

- The legal name of the vendor, address and telephone number.
- The structure of the organization (e.g., sole proprietorship, partnership, corporation, etc.) including state of formation.
- The name, address and telephone number of the person to whom correspondence should be directed.
- The year the company was established as currently being operated.
- A certified financial statement, including, but not limited to a Dun and Bradstreet rating.

Vendor Background & Work Experience:

- A list of all communities within the local utility (e.g. Pacific Gas and Electric, Southern California Edison, San Diego Gas & Electric) territory in which the vendor has provided and maintained publicly-available EVSE during the last five years, if applicable. Please list communities with active EVSE and communities where EVSE have been removed. Also include the following information for each community:
 - Name of the organization that contracted with you for EVSE sites. Please include the name of a contact person and phone number.
 - Was the contract/franchise exclusive or nonexclusive?
 - Number of EVSE provided.
 - Time period that the EVSE were installed.
 - Reporting sales & usage (sample reports)
- A list with additional California communities, and/or communities in United States in which the vendor has provided and maintained publicly-available EVSE during the last five years, if applicable. Include all of the information identified in the previous bullet.
- Please list any public agencies that have chosen to cancel or not renew EVSE contracts with your firm during the last five years. Show names of organizations and names and phone numbers of persons who can be contacted.

- Provide qualifications of the local contractors that will perform the EVSE installations. Demonstrate that the vendor is working with C-10 licensed electrical contractors employing California state-certified electricians to handle EVSE installations and maintenance.
 - List any EVSE-specific trainings or certifications that the vendor's electrical contractor and/or the contractor's electricians have completed, if applicable (e.g. The Electric Vehicle Infrastructure Training Program (EVITP) or UL training).
 - Include the number of EVSE installations completed to date by the vendor's electrical contractor and/or the contractor's electricians.
- Demonstrate an understanding of <insert jurisdiction> processes, required permits, permit costs, licenses, applicable state and local codes specific to EVSE and procedures for this type of project.

Scope of Work:

- A written and pictorial description of the proposed EVSE design, including:
 - Comprehensive specifications (including make, manufacturer, & model numbers of equipment).
 - Delivery and proposed installation schedule.
 - The submission of more than one type of charging station is permitted, however, if the selection of any particular design would result in a change to the proposed rate structure and method of collection, those changes must be noted.
- Metering configurations identifying how the vendor will provide the electricity to the EVSE end consumer at no cost to the jurisdiction.
 - Process and schedule for reimbursement to the jurisdiction for cost recovery of electricity provided to EVSE (if applicable).
- Proposed EVSE end consumer rate structure (e.g. charging customers per kWh usage or plug time) and customer method of payment (e.g. credit card reader for universal usage or restricted access for only network users).
- Description of the proposed EVSE maintenance program including the location of maintenance facilities, number of staff that will be available for maintenance, and anticipated response times.
- Description of ability and staff expertise to provide services including marketing, installation, monitoring, and maintenance of EVSE.
 - Quality control/safety features.
 - Marketing plan details and available resources.
- Financial incentives to the <insert jurisdiction> (if applicable).
- Options for EVSE when the agreement expires (e.g. charging unit removal, transfer of ownership, contract renewal options) and responsible party for any costs incurred (if applicable). Highly preferred that the vendor cover any removal costs.

Additional Items:

- The proposal must be signed by the individual(s) legally authorized to bind the vendor.
- If complete responses cannot be provided without referencing supporting documentation, such documentation must be provided with the proposal and specific references made to the tab, page, section and/or paragraph where the supplemental information can be found.

6. Proposal Evaluation & Award Process

Proposals will be evaluated based on the following criteria (please reference attached *RFP Criteria Review Template*):

- Current and past vendor performance in similar contracts with other agencies.
- Financial stability of the proposer as reflected in a certified financial statement or other certified statement, including but not limited to a Dun and Bradstreet financial rating.
- EV customer rate structure and method of customer payment that will be used to charge customers.
- Description of metering configuration.
- Process and schedule to reimburse the jurisdiction in order to recoup cost of electricity used to provide EVSE (if applicable).
- Maximum public benefit (i.e., in terms of affordability and customer support).
- Strength, quality, durability, advanced technology, future flexibility, and aesthetic appeal of proposed EVSE.
- Proposed maintenance, repair and replacement schedule including response times for malfunctioning EVSE (e.g. vendor's proximity to the <insert jurisdiction> and number of proposer's employees performing maintenance functions).
- Possible commitment to providing additional EVSE at other <insert jurisdiction> owned parking facilities (desirable but not required).
- Vendor's specific marketing strategy that includes product advertising.
 - EVSE installation marketing plan.
 - Description of the vendor's available marketing resources.
- Proposed options for EVSE (e.g. system removal, transfer of ownership, contract renewal options) when the agreement expires and potential costs to the jurisdiction.
- Overall monetary return to the <insert jurisdiction> (if applicable).

Suggestion for Jurisdiction: Create a scoring criterion that may include assignment of percentages and/or weighting each criterion listed above.

7. Project Specifications

- Provide installation site plans (if applicable [for reference, please see Exhibit A of the City of Long Beach RFP No. PW12-016]).

8. Subcontractor Information and Business License

Does this proposal include the use of subcontractors?

Yes _____ No _____ Initials _____

If "Yes", vendor must:

- Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor will perform services.

- The <insert jurisdiction> requires that the awarded vendor provide proof of payment of any subcontractors used for this project. Proposals shall include a plan by which the <insert jurisdiction> will be notified of such payments.
- Primary contractor shall not allow any subcontractor to commence work until all insurance required of subcontractor is obtained.

BUSINESS LICENSE

<Insert Jurisdiction> requires all businesses operating in the <insert jurisdiction> to pay a business license tax. In some cases the <insert jurisdiction> may require a regulatory permit and/or evidence of a State or Federal license. Prior to issuing a business license, certain business types will require the business license application and/or business location to be reviewed by the Development Services, Fire, Health, and/or Police Departments.

9. Cost

- N/A

10. Terms, Conditions and Exceptions

<Insert project specific terms, conditions and exceptions>

To view an example, please reference section 9 of the City of Long Beach RFP No. PW12-016.

<Insert individual public liability and insurance requirements for your agency>

Additional Resources - Sample evaluation criteria for scoring RFPs

1. Criteria Used in Evaluating Proposals
2. Vendor Evaluation Criteria

Agenda Item 5, Attachment 2

CRITERIA USED IN EVALUATING PROPOSALS (Version 1)

[PM to determine a weighted value for each evaluation criteria below] All proposals must be completed and convey all of the information requested in order to be considered responsive. The proposals then will be evaluated on the basis of the criteria listed below. The total number of points used to score this purchase order agreement is 100.

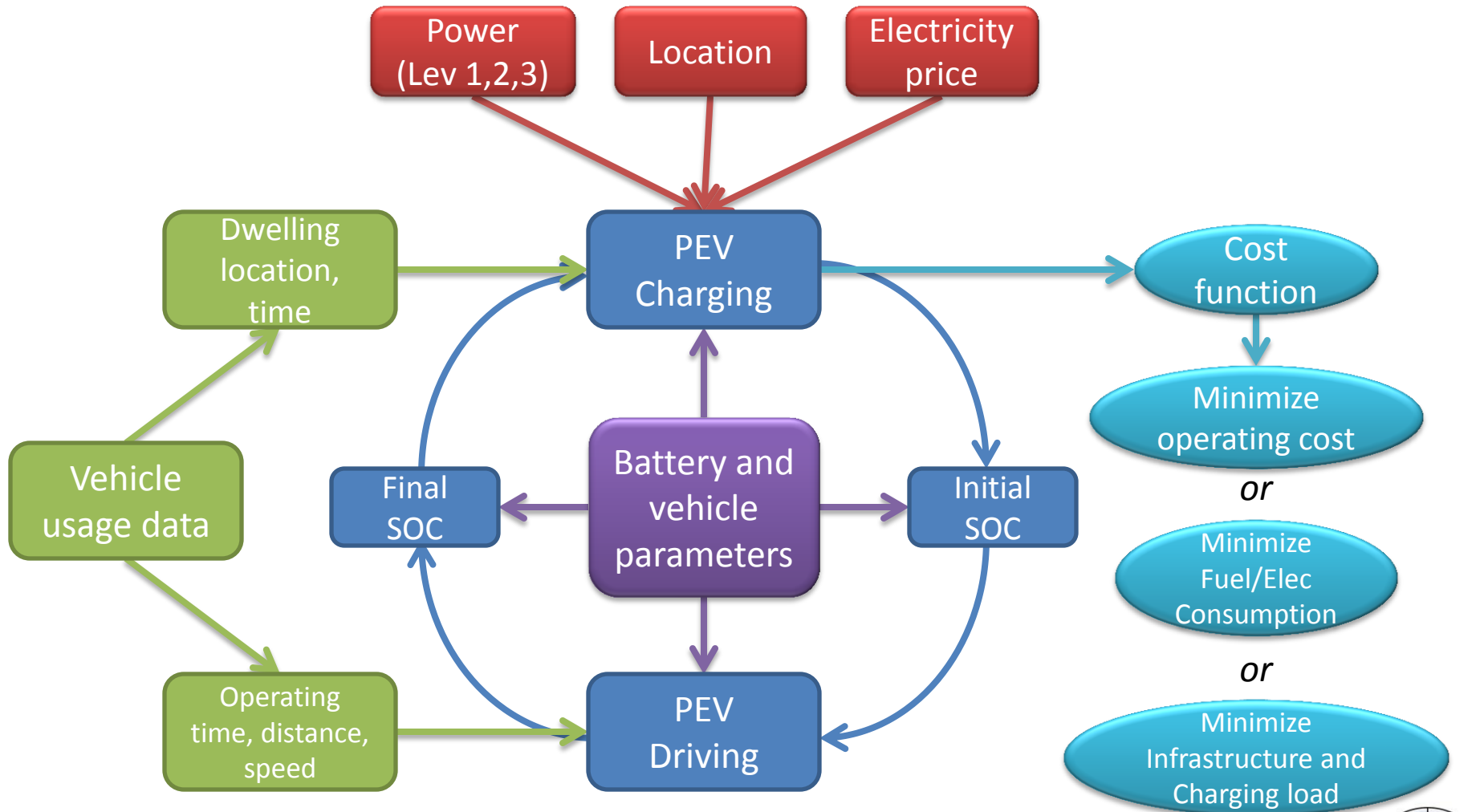
Criteria	Description	Points
Proposed method to accomplish the work	<ul style="list-style-type: none">Professional qualificationsRelevant experience	_____
Project experience	<ul style="list-style-type: none">Nature, quality, and relevance of recently completed projects	_____
Staff Qualifications	<ul style="list-style-type: none">Unique qualification of key personnel	_____
Cost or Best Value	<ul style="list-style-type: none">Ranking of comparative costs among proposed firms, providing the best value for system and services offered	_____
Total		100

EVSE Vendor Criteria Review

Your Municipality Name	Scoring Guideline	
	0	No information provided
	1	Poor
	2	Limited
	3	Adequate
	4	Good
5	Excellent	
<i>Reviewer Name:</i>		
<i>Date:</i>		
<i>Vendor Name:</i>		
Review Criteria	Score: 0 - 5	Notes
Current and past vendor performance in similar contracts with other local government agencies.		
Financial stability of the proposer as reflected in a certified financial statement or other certified statement, including but not limited to a Dun and Bradstreet financial rating.		
Rate structure and method of payment collection (i.e. the use of the main meter or sub meters).		
Maximum public benefit (in terms of affordability & customer support)		
Strength, quality, durability, advanced technology, future flexibility, and aesthetic appeal of proposed charging stations.		
Proposed maintenance, repair and replacement schedule including response times for malfunctioning equipment. (i.e. proposer's proximity to the City and number of proposer's employees performing maintenance functions).		
Possible commitment to providing additional charging stations at other City owned parking facilities (desirable but not required).		
Proposers marketing strategy		
Overall monetary return to the City (if applicable)		

Total Score: _____

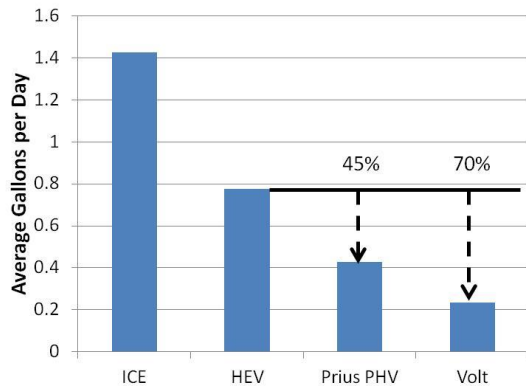
Modeling Approach for PEV Infrastructure



Modeling Results for PEV Infrastructure

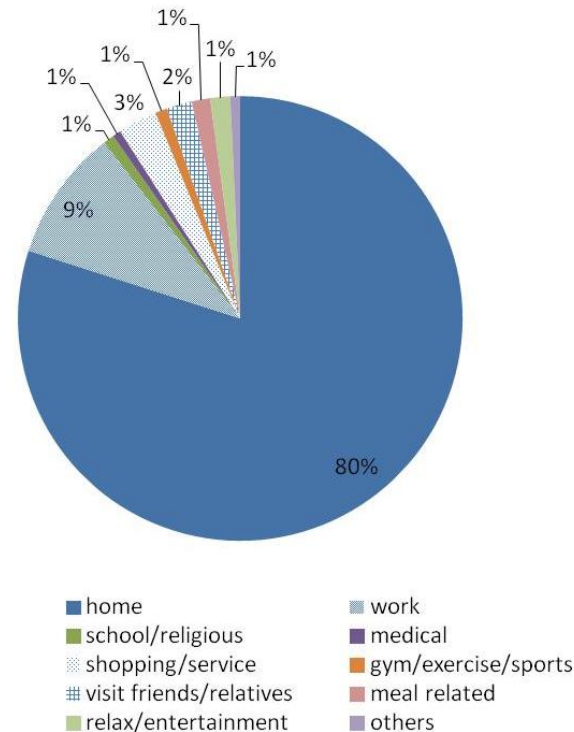
Level 1

- At home Level 1 is all that is needed for PHEVs
- E.g. Chevy Volt can achieve 70% reduction in gasoline consumption (compared to HEV) with only Level 1 at home



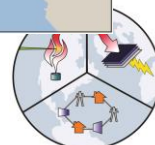
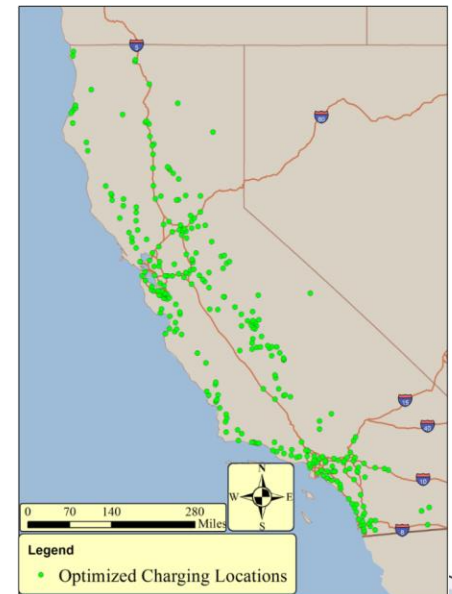
Level 2

- At-home Level 2 is critical to enable BEVs
- E.g. 8-1-1 is ideal Level 2 EVSE distribution



Level 3

- Level 3 provides “safety net” for BEV drivers
- E.g. 290 Level 3 locations in CA (plus home charging) can enable 98% of drivers to use BEVs



Progress on Regional PEV Barriers

Barriers/Solutions Being Addressed by the SJVPEVCC		
Barriers in Order of Priority	Progress on Solutions – Preparation of Guidance Materials	Action Items
<p>1. Lack of Public Knowledge of PEV and EVSE Municipal outreach to Local Residents and Businesses</p>	<ul style="list-style-type: none"> Barrier identified in SJVPEV Readiness Plan (pg. 43 – 47) During the February 7, 2013 meeting, this barrier was voted as the highest priority in the Valley. During the March 7, 2013 meeting, the coordinating council (CC) provided recommendations for education and outreach avenues. The CC requested a presentation be created and distributed to the group Draft presentations provided to the CC for review during April 4, 2013 meeting as well as the compiled education and outreach recommendations Presentation provided to the CC at May 2, 2013 meeting covering EVSE technology, site-specific requirements and network charging membership information 	<ul style="list-style-type: none"> Discussed March 7, 2013 meeting Draft review April 4, 2013 meeting Posted education and outreach materials and presentations on Plug-in & Get Ready website (on-going)
<p>2. Zoning and Parking Rules Lack of standard regional ordinances that facilitate the installation and access to publicly available charging infrastructure.</p>	<ul style="list-style-type: none"> Barrier identified in SJVPEV Readiness Plan (pg. 19 – 24) During the February 7, 2013 meeting, this barrier was voted as the second highest priority in the Valley During the March 7, 2013 meeting, the CC agreed that zoning and parking rules are important and next steps need to be taken however the PEVCC highlighted the importance of educating local officials and the public before lobbying for ordinance changes. 	<ul style="list-style-type: none"> Discussed March 7, 2013 meeting Post PEV tools, resources and links on Plug-in & Get Ready website (on-going)

<p>3. Training and Education for Municipal Staff and Electrical Contractors Lack of knowledge about PEVs and EVSE</p>	<ul style="list-style-type: none"> • Barrier identified in SJVPEV Readiness Plan (pg. 39 – 42) • During the February 7, 2013 meeting, this barrier was voted as the third highest priority in the Valley • During the March 7, 2013 meeting, the coordinating council (CC) provided recommendations for training and education avenues • The compiled education and outreach recommendations were provided to the CC for review during the April 4, 2013 meeting • Residential and non-residential EVSE installation guide from U.S. DOE Clean Cities PEV Handbook for Electrical Contractors presented to the CC for review during the May 2, 2013 meeting 	<ul style="list-style-type: none"> • Discussed March 7, 2013 meeting • Draft review April 4, 2013 meeting • Posted education and outreach materials and presentations on Plug-in & Get Ready website (on-going)
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Progress on Regional PEV Barriers

<p>Barriers/Solutions Being Addressed by the SJVPEVCC</p>		
<p>4. Permitting/Inspection Lack of streamlined permitting and inspection processes and inconsistent (high) costs across jurisdictions.</p>	<ul style="list-style-type: none"> • Barrier identified in San Joaquin Valley Plug-In Electric Vehicle (SJVPEV) Readiness Plan (pg. 25 - 32) • Residential permitting/inspection guide presented to the CC for review during the April 4, 2013 meeting. The CC agreed that non-residential permitting/inspection process is a higher priority • California Zero-Emission Vehicle (ZEV) Readiness Guidebook: “Retail and Public Sector Charging” document developed by the Governor’s OPR were provided to the CC for review at the May 2, 2013 meeting 	<ul style="list-style-type: none"> • Discussed & review April 4, 2013 meeting • Post PEV tools, resources and links on Plug-in & Get Ready website (on-going) • Commercial and retail EVSE permitting discussed May 2, 2013 • Submitted CC comments and regional recommendations on permitting commercial EVSE installations to Governor’s OPR

<p>5. On Peak Charging – TOU Utility Rates and Grid Impacts A. Need to discourage charging when electricity supplies are in high demand and cost more. Support of time of use (TOU) pricing. B. High demand charges that impact EVSE host utility bills. Expensive metering options to access TOU rates.</p>	<ul style="list-style-type: none"> • SCE & City of Lodi Electric Utility gave presentations to the CC during the April 4, 2013 meeting 	<ul style="list-style-type: none"> • Discussed April 4, 2013 meeting • Post SCE presentation, Plug-In Electric Vehicle Calculators, and other resource information on Plug-in & Get Ready website (on-going)
<p>6. Workplace Charging Lack of understanding regarding benefits and approaches to understanding workplace charging.</p>	<ul style="list-style-type: none"> • California Zero-Emission Vehicle (ZEV) Readiness Guidebook: “Workplace Charging” document developed by the Governor’s OPR were provided to the CC for review at the May 2, 2013 meeting 	<ul style="list-style-type: none"> • Discussed May 2, 2013 meeting • Submitted CC comments and regional recommendations on permitting workplace EVSE installations to Governor’s OPR
<p>7. Building Codes Lack of standard building codes that accommodate charging infrastructure or dedicate circuits for charging infrastructure in new construction and major renovations.</p>	<ul style="list-style-type: none"> • Barrier identified in SJVPEV Readiness Plan (pg. 33 – 38) • Title 24 updates for EVSE and building code recommendations from the San Joaquin Valley PEV Readiness Assessment were provided to the CC for review at the May 2, 2013 meeting 	<ul style="list-style-type: none"> • Discussed May 2, 2013 meeting • Post PEV tools, resources and links on Plug-in & Get Ready website (on-going) • Submitted CC comments and feedback on EVSE code from the voluntary CALGreen measures to Energy Solutions, the state’s preferred contractor for building code updates for EVSE

Barriers/Solutions Being Addressed by the SJVPEVCC

Barriers in Order of Priority	Progress on Solutions – Preparation of Guidance Materials	Action Items
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<p>8. EVSE at Multi Unit Dwellings (MUDs) Consumer lack of knowledge regarding EVSE installation in these buildings. Need to educate and work with HOAs to identify and find solutions to unique building challenges.</p>	<ul style="list-style-type: none"> • CC members provided recommendations to address regional barriers to the deployment of EVSE at MUDs • To be updated as project develops 	<ul style="list-style-type: none"> • Discussed June 10, 2013 meeting
<p>9. Regional Planning for Public EVSE Siting Regional land use and transportation plans served as a basis to identify optimal public EVSE sites.</p>	<ul style="list-style-type: none"> • Presentation given at City of Visalia Planners Luncheon covering regional PEV barriers and PEVCC objectives • To be updated as project develops 	<ul style="list-style-type: none"> • Scheduled July 11, 2013 meeting
<p>10. Public Agency EVSE Installations Providing local jurisdictions with knowledge of PEV market development. Need to identify barriers and find solutions.</p>	<ul style="list-style-type: none"> • To be updated as project develops 	<ul style="list-style-type: none"> • Scheduled July 11, 2013 meeting
<p>11. Promotion of PEVs in Government Fleets Procurement justification needed for local public fleets. Need to describe PEV benefits, including role in reducing municipal GHGs for Climate Action Plans.</p>	<ul style="list-style-type: none"> • To be updated as project develops 	<ul style="list-style-type: none"> • N/A

Barriers/Solutions Being Addressed by the SJVPEVCC

Barriers in Order of Priority	Progress on Solutions – Preparation of Guidance Materials	Action Items
<p>12. Leveraging Renewable Energy in PEV Charging Educate on the use of renewables in order to provide the fuel to power an EV</p>	<ul style="list-style-type: none"> To be updated as project develops 	<ul style="list-style-type: none"> N/A

Additional Barriers Identified at February 7, 2013 Meeting

<p>13. Lack of Developed Policy, Liability and Management Documents Creating guidelines for municipal management regarding public and workplace operations and maintenance relating to EVSEs.</p>	<ul style="list-style-type: none"> Barrier was identified during the February 7, 2013 meeting 	<ul style="list-style-type: none"> N/A
<p>14. PEV and EVSE Incentives In the early stages of development, incentive programs should be made available and the necessary outreach must be conducted to notify the public about the existence of these programs</p>	<ul style="list-style-type: none"> Barrier was identified during the February 7, 2013 meeting 	<ul style="list-style-type: none"> N/A
<p>15. PEV Friendly Policies in RTP Identify and/or create PEV friendly policies that can be implemented by all regions</p>	<ul style="list-style-type: none"> Barrier was identified during the February 7, 2013 meeting 	<ul style="list-style-type: none"> N/A

Barriers/Solutions Being Addressed by the SJVPEVCC

Barriers in Order of Priority	Progress on Solutions – Preparation of Guidance Materials	Action Items
<p>16. Training and Education for Car Dealerships Car dealerships have direct contact with new car buyers so it is important that they are knowledgeable and trained about EVs</p>	<ul style="list-style-type: none"> • Barrier was identified during the February 7, 2013 meeting 	<ul style="list-style-type: none"> • N/A
<p>17. Interoperability Create the ability of diverse EVSE networks to work together</p>	<ul style="list-style-type: none"> • Barrier was identified during the February 7, 2013 meeting 	<ul style="list-style-type: none"> • N/A