



# COMMUNITIES IN CHARGE

IMPLEMENTATION MANUAL

FUNDING WAVE 2

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## Implementation Manual – Funding Wave 2

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## Key Definitions

### **Project Site**

The real property with an identifiable address in California in which Level 2 EVSEs shall be installed and remain in operation for the duration of the network agreement. New construction (i.e. – Greenfield, Brownfield) is not an eligible Project Site.

### **Battery Electric Vehicle (BEV)**

**A vehicle which uses electricity from an on-board battery as its sole source for propulsion.**

### **Plug-in Hybrid Electric Vehicle (PHEV)**

A vehicle that combines two propulsion modes in one vehicle – an electric motor that is powered by a rechargeable battery and an internal combustion engine.

### **Community-Based Organization (CBO)**

A public or private nonprofit organization that is representative of a community or significant segments of a community.

Community-based organizations is further defined as an organization that (a) is place-based, with an explicit geographic focus area that includes proposed Project Site(s), (b) has staff members, volunteers, or Board members that reside in the community where the Project Site(s) are located or intended to serve, and (c) has a demonstrated track record of at least one year providing services in the geographic focus area that includes proposed Project Site(s).

### **Community Connection**

A Community Connection is defined as a Project Site with particular benefit to its surrounding community. Applicants whose Project Site may be identified as such must meet specific requirements (outlined within this Implementation Manual).

### **Level 2 EVSE (electric vehicle supply equipment)**

The ENERGY STAR® certified equipment that connects to a BEV or PHEV and supplies charge using alternating current (AC). Level 2 EVSEs require a 208/240-volt AC input. A Level 2 EVSE may have one or two connectors.



## Connector

The equipment originating from a single ENERGY STAR® certified Level 2 EVSE, that connects to a BEV or PHEV using the SAE J1772 connector and is capable of supplying 6.2 kilowatts (kW) or greater. A Level 2 EVSE may have one or two connectors. If two connectors can be used concurrently to charge two vehicles, then the Level 2 EVSE has two eligible connectors.

## Disadvantaged Community (DAC)

CalEPA formally designated four categories of geographic areas as disadvantaged:

- a) Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0.
- b) Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores.
- c) Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0.
- d) Lands under the control of federally recognized Tribes are also considered disadvantaged communities. Tribes may be added to a California managed list in accordance with CalEPA guidance.

\*For the most relevant map to identify Disadvantaged Communities please follow the link below.

<https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities/>

## Light Duty Vehicle

A vehicle primarily used to transport passengers and cargo (i.e., cars, vans, SUVs, pickup trucks), with a Gross Vehicle Weight Rating (GVWR) less than or equal to 10,000 pounds, (i.e., Class 1 through Class 2 Vehicles, as designated by the U.S. Department of Transportation).

## Low-Income Community

A geographic area whose census tracts have been identified as “Low-income Communities” per Assembly Bill 1550, or a low-income household per Assembly Bill 1550.<sup>1</sup>

\*For the most relevant map to identify Low-Income Communities please follow the link below:

<https://webmaps.arb.ca.gov/PriorityPopulations/>

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<sup>1</sup> For more information, please see <https://webmaps.arb.ca.gov/PriorityPopulations/>



## **Priority Populations**

As identified in California census tracts, Priority Populations are Disadvantaged Communities, federally recognized Tribal Lands, and Low-Income Communities. Only Project Sites which lie within the bounds of a DAC or LIC and not within “buffer” areas shall be considered as such for scoring purposes.

## **Workplace Charging**

Commercial properties owned or leased by a business that provides EV charging to its employees on a preferential basis over contractors, customers, or other visitors parking on-site.

## **Multi-Family Housing**

Residential properties with multiple dwelling units installed on real property owned or leased for multi-family housing and have 5 or more units. Single-family dwellings (detached), duplexes, triplexes, individual townhomes, and individual mobile homes are not considered multi-family Housing. However, installations may include shared-use Level 2 EVSEs made available to residents domiciled in these housing developments.

## **Site Host**

An individual who owns, leases or manages the property on which Level 2 EV chargers are installed.

## **Incurred Costs**

Invoiced costs to the Applicant for planning, installation, construction, and deployment of Level 2 EVSE infrastructure at an eligible Project Site shall be considered “Incurred Costs”. The invoice date for said costs shall serve as the date on which costs were incurred. The date on which an invoice was paid shall NOT serve as the date on which costs were incurred. The Applicant must be the party to have incurred all project eligible costs to submit for payment and shall be required to show proof that said costs were paid (e.g., copy of a cancelled check).

## **Final Commissioning**

A project site is deemed “Commissioned” or has received “Final Commissioning” on the date the Final Inspection Card has been signed by the appropriate AHJ.



## 1. Introduction

### 1.1. Background

Communities in Charge is California’s market-accelerating, light-duty electric vehicle (LDEV) infrastructure incentive project implemented by CALSTART and supported in partnership with GRID Alternatives and Tetra Tech. Communities in Charge is designed to rapidly catalyze new markets and swiftly deploy Level 2 electric vehicle (EV) charging stations with intentional outreach, engagement, and technical assistance which support the deployment of Level 2 EVSEs that serve the communities they are in. Through identifying and prioritizing locations where communities live and gather, Communities in Charge not only intends to deploy Level 2 EVSEs, but also provide streamlined access to incentive funds for the benefit of communities.

The California Energy Commission (CEC) approved CALSTART to design and implement Level 2 EVSE incentive project(s) throughout California. Incentive totals for the launch of Funding Wave 2 of Communities in Charge shall be \$38 million and may change over time to support project scalability.

Note to Applicants: At the time of application submittal, the most current Project Implementation Manual available, as well as the Project Requirements agreed to by the Applicant, will apply. However, CALSTART may change the conditions of the Implementation Manual as needed for the good of the program.

### 1.2. Objectives & Priorities

Communities in Charge aims to balance rapid deployment of Level 2 EVSEs with equitable access to incentives by elevating Priority Populations and creating unique opportunities for high-utilization site types. Communities in Charge Staff and the CEC are committed to inclusion, diversity, equity, and access, ensuring that all Californians have an opportunity to participate in and benefit from these programs and services. Project location is one metric for evaluating the equity implications of specific projects.

To meet these and other equity objectives, Communities in Charge Staff conducted outreach, held workshops, and incorporated public feedback into funding opportunities throughout the design process. “Community Connections,” described later in this Implementation Manual, have been developed to provide tailored outreach, technical assistance, and elevate Project Site types where communities live and gather.

The Fiscal Year 2021-2022 Clean Transportation Program Investment Plan states that “The CEC will seek to provide at least 50 percent of Clean Transportation Program funds from this investment plan toward projects that benefit low-income and disadvantaged communities (LIC and DAC). The CEC will seek to quantify these benefits in ways that go beyond measuring funding amounts within a given location and will continue to investigate new metrics to ensure these investments enhance equity within the State.”





Project design of Communities in Charge takes these factors into account with regards to eligibility, incentive structure, and opportunities for technical assistance through balancing rapid deployment of Level 2 EVSEs with equitable access to incentives by elevating Priority Populations and creating opportunities for high-utilization site types. To that end, Communities in Charge aims to provide the majority (at least 50%) of project funds to infrastructure located in disadvantaged, low-income, and Tribal Nation communities.

### 1.3. Funding Wave 2 – Primary Design Updates

Incentives for Funding Wave 2 of Communities in Charge shall continue to be made available to applicants across the state of California. To encourage distribution across the state and afford greater opportunity for equitable participation amongst applicants from similar geographies, incentive funds will be distributed across four regions: Northern, Southern, Central and Eastern (see the figure below). Funding availability has been apportioned based upon regional population, proportion of area represented by DAC/LIC census tracts, and historical investment of funds from past incentive programs, including CALeVIP 1.0 funding for Level 2 chargers.





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The following table outlines the counties which make up the regions described above:

Central Region	Eastern Region	Northern Region	Southern Region
Alameda	Alpine	Butte	Los Angeles
Contra Costa	Amador	Colusa	San Diego
Marin	Calaveras	Del Norte	Orange
Monterey	Fresno	El Dorado	
San Benito	Imperial	Glenn	
San Francisco	Inyo	Humboldt	
San Luis Obispo	Kern	Lake	
San Mateo	Kings	Lassen	
Santa Barbara	Madera	Mendocino	
Santa Clara	Mariposa	Modoc	
Santa Cruz	Merced	Napa	
Ventura	Mono	Nevada	
	Riverside	Placer	
	San Bernardino	Plumas	
	San Joaquin	Sacramento	
	Stanislaus	Shasta	
	Tulare	Sierra	
	Tuolumne	Siskiyou	
		Solano	
		Sonoma	
		Sutter	
		Tehama	
		Trinity	
		Yolo	
		Yuba	

## 2. Eligibility

### 2.1. Applicant Eligibility

An Applicant to Communities in Charge must be the property owner, their authorized lessee, or their authorized representative seeking incentives for eligible costs incurred towards the installation of Level 2 EVSEs.

The Applicant is responsible for submitting an application and providing all required documentation to CALSTART. Applicants may apply as a duly appointed representative for their Project Site (e.g., facilities manager for a school), but an Applicant MAY NOT assign the incentive to a third party. Only those eligible costs incurred by the Applicant will be considered for incentive reimbursement. Note: The Applicant incurring costs and receiving incentive funding from Communities in Charge, is not permitted to charge profit or mark up costs including labor.



## 2.2. Project Site Eligibility

A Project Site for Communities in Charge is the real property with an identifiable address in California on which planned expansion of Level 2 EV chargers shall be installed and remain in operation for the duration of their network agreement. All Level 2 EV site types (excluding single-family homes, duplexes, triplexes, and individual mobile homes) are eligible for incentives. Any eligible applicant whose project site can provide the documentation described in Section 4 may apply.

Community Connections (defined later in this section) will be prioritized in scoring. A list of example project sites has been included below. While this list is meant to capture a wide array of potential project locations, it is not a comprehensive list.

### Example sites:

- Multi-family housing (5 or more units)
- Health facilities (e.g., hospitals, rehab centers, nursing homes, urgent care centers) as defined by the California Health and Safety Code
- Workplace charging, such as for small businesses
- K-12 schools, community colleges, and universities
- Places of worship
- IRS Section 501 nonprofits
- State/City/County/Municipal property lots (including libraries, parks, pools, recreational facilities, and city halls)
- Public transit hubs and mobility hubs
- Project sites for Federally Recognized Tribal Governments, California Tribal Organizations, or Non-Government Organization Serving Tribal Entities

Communities in Charge applicants will be afforded the option to operate a private or public Level 2 EV infrastructure site that provides flexibility and safety for their unique location. At a minimum, Project Sites must abide by the requirements below:

- a) Premises must be well-lit, secure, and in compliance with all US federal, California state, and local laws, ordinances, rules, codes, standards, and regulations.



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- b) Any Level 2 EVSEs made accessible to the general public must be available at least 18 hours a day, seven days a week, excluding holidays.
- c) All Level 2 EVSEs must be shared and may not be assigned or otherwise allocated to any one individual.
- d) Single-family dwellings (detached), duplexes, triplexes, individual townhomes, and individual mobile homes are not eligible site types, however, shared-use sites made available to residents domiciled in these housing developments are eligible.
- e) Communities in Charge funding shall be for light-duty vehicle charging only. Development of EV charging sites using Communities in Charge incentives for the following vehicles is not allowable under Communities in Charge: (1) Medium/Heavy-Duty Vehicles, and (2) School Buses.
- f) Project Sites that have already been commissioned are not eligible for incentives.

## 2.3. Community Connection Eligibility

CALSTART shall use an equitable assessment of incentive distribution among applicants seeking funding for Level 2 EV infrastructure. To accomplish this, eligible project sites located where communities live and gather will be prioritized and termed, “Community Connections.”

The documents described below are only required if an applicant wishes to demonstrate they belong to a particular Community Connection. Should an applicant be able to demonstrate their benefit to more than one Community Connection, they may choose whichever one Community Connection’s documents most pertain to their site. An Applicant’s ability to demonstrate their benefit to more than one Community Connection will not benefit their score.

Community Connections include:

### 2.3.1. Multi-Family Housing in Charge

- a) EV charging infrastructure shall meet ONE of the following criteria:
  - i) Be installed on real property owned or leased for multi-family housing, have 5 or more units, and be deed-restricted low-income residential housing; or
  - ii) Be installed on real property with Solar on Multi-family Affordable Housing (SOMAH) Incentive award installed or in process; or
  - iii) Be installed on real property recognized by the US Department of Housing and Urban Development ([HUD](#)) for use by residents of [affordable multi-family housing](#).
- b) Applicant must supply ONE of the following to Communities in Charge Staff:
  - i) Detailed property documentation including but not limited to number of units, proof that property is deed-restricted low-income residential housing (if applicable); or



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- ii) Proof that property on which infrastructure shall be installed serves a SOMAH awarded property or SOMAH installation in process (if applicable); or
  - iii) Proof that property on which infrastructure shall be installed shall serve a HUD recognized affordable multi-family housing development (if applicable).
- c) In the event there are barriers associated with the electrical system, parking limitations, or other challenges that may prevent an on-site installation, Applicants may apply to install charging at an adjacent or neighboring location. To be eligible, this adjacent location must be intended for use by the multi-family housing residents.

For example, a multi-family housing complex that does not have sufficient space to accommodate resident parking, thus the property owner purchased the property across the street from the multi-family housing complex and reserved it for resident parking. Although the property across the street is not directly attached to the multi-family housing complex, the neighboring property would be eligible for incentives because both properties are owned by the same property owner and the neighboring property is intended to be used by the multi-family housing residents.

### 2.3.2. Tribes in Charge

- a) EV charging infrastructure shall meet ONE of the following criteria:
- i) Be installed on real property for the use of a Federally Recognized Tribal Government listed under the Indian Entities Recognized by and Eligible to Receive Services from the United States Bureau of Indian Affairs; or
  - ii) Be installed on real property for the use of a “Tribal Organization” (as defined by [Health and Safety Code Section 44270.3](#)); or
  - iii) Be installed on real property for the use of a Non-Government Organization Serving Tribal Entities.
- b) Applicant must supply the following documentation to Communities in Charge Staff through the Incentive Processing Center:
- i) Self-certification document signed by the NGO, Tribal Entity, or other relevant party indicating the incentivized infrastructure shall be utilized for the purposes outlined above and detailing service provided.

### 2.3.3. Congregations in Charge

- a) EV Charging Infrastructure shall meet the following criterion:
- i) Be installed on real property owned or leased by a tax-exempt religious organization recognized by the State of California.



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- b) Applicant must supply the following to Communities in Charge Staff:
  - i) A signed, executed, and filed affidavit for "Church Exemption" (with proof of filing date) required by the relevant authority having jurisdiction pursuant to [Revenue and Taxation Code, Section 254](#). This affidavit must pertain to the real property on which infrastructure shall be installed;
  - ii) A copy of the valid [Articles of Incorporation of a Nonprofit Religious Corporation](#) on file with the California Secretary of State for the relevant religious corporation

### 2.3.4. Schools in Charge

- a) EV Charging Infrastructure shall meet ONE of the following criteria:
  - i) Be installed on real property owned or leased by a Public School as defined by the [California, Revenue and Taxation Code section 202, subd. \(a\)\(3\)](#); or
  - ii) Be installed on real property owned or leased by a postsecondary educational institution.
- b) Applicants must supply the following to Communities in Charge Staff, unless stated otherwise:
  - i) A copy of the valid [Articles of Incorporation](#) on file with the California Secretary of State for the relevant educational corporation;
  - ii) (For Public Schools ONLY) A signed, executed, and filed affidavit for "Public School Exemption" (with proof of filing date) required by the relevant authority having jurisdiction pursuant to **the [Revenue and Taxation Code, Section 254](#)**. This affidavit must pertain to the real property on which infrastructure shall be installed;
  - iii) (For private postsecondary schools ONLY) A copy of IRS form 990-N.
- c) Installations for school bus charging are not eligible for incentives.

### 2.3.5. Healthcare in Charge

- a) EV charging infrastructure shall meet the following criteria:
  - i) Be installed on real property owned or leased by a "Health Facility" as defined by the [California Health and Safety Code Section 1250](#); and
  - ii) Be for the purpose of providing EV charging to persons designated by the Health Facility as employees, residents, patients, visitors, or other relevant persons directly involved in Health Facility activities.
- b) Applicants must supply the following to Communities in Charge Staff:
  - i) A valid License and, if applicable, Special Permit issued by the California State Department or appropriate governing body as detailed in the [California Health and Safety Code Section 1254](#).

### 2.3.6. Nonprofits in Charge

- a) EV charging infrastructure shall meet the following criterion:



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- i) Be installed on real property owned or leased by a nonprofit organization qualifying for tax-exempt status with the Internal Revenue Service under Internal Revenue Code Section 501 and are also tax-exempt under California state law, consistent with the following requirements:
  - o The nonprofit organization must have been incorporated for at least one year prior to the time of application submittal;
  - o The nonprofit organization must always be registered and in active/good standing with the California Secretary of State; and
  - o The organization's facility must be based in California and have at least one full-time staff person based in California.
- b) Applicants must supply the following to Communities in Charge Staff:
  - i) Evidence of their tax-exempt status with the Internal Revenue Service under Internal Revenue Code Section 501 (Copy of the IRS Determination Letter) and their tax-exempt status under California State law (Copy of Exemption Letter from State of California Franchise Tax Board); and
  - ii) Evidence of at least one-year incorporation from the time of voucher application submission (Copy of Articles of Incorporation); and
  - iii) Evidence of being registered and in active and good standing with the California Secretary of State (Copy of Statement of Information and Certificate of Status).

### 2.3.7. Local Governments in Charge

- a) EV charging infrastructure shall meet the following criterion:
  - i) Be installed on real property owned or leased by State, County, City, Municipal or local government for the purpose of servicing community members. Properties include but are not limited to parks, pools, recreational facilities, city halls, libraries, and park and ride sites, etc.
- b) Applicants must supply the following to Communities in Charge Staff:
  - i) Copy of the local government property deed including property name and/or exact property number accessible through the [California Statewide Property Locator](#).

\*Local Governments in Charge may offer Level 2 EVSEs to light-duty municipal fleets.

### 2.3.8. Workplaces in Charge

- a) EV charging infrastructure shall meet the following criteria:
  - i) Be intended for those directly employed by the business itself, but may be available to visitors to the Project Site;
  - ii) Be installed on real property owned or leased by either:
    - i) A business whose primary activity is “Retail Trade” or “Accommodation and Food Services,” and whose six-digit North American Industry Classification System (NAICS) code begins with



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44, 45, or 72. NOTE: In a situation where a landlord/tenant relationship has been established, a property building manager may qualify and apply on behalf of a tenant for Workplaces in Charge provided they are able to prove that one or more of their tenants qualify for Workplaces in Charge;

- ii) A small business as recognized by the [California Legislative Code, Section 14837\(d\)](#)<sup>2</sup>.
- b) Applicants must supply the following to Communities in Charge Staff (as applicable):
  - i) Copy of small business certification from the [California Department of General Services](#). Certification must be current;
  - ii) Copy of most recent IRS filings including six-digit NAICS business activity code number;
  - iii) Copy of lease for business whose primary activity is “Retail Trade” or “Accommodation and Food Services,” or is a small business as recognized by the California Legislative Code, Section 14837(d), with the real property on which infrastructure shall be installed clearly described.
- c) Businesses and organizations seeking to provide charging for their workers may NOT:
  - i) Be recognized as a nonemployer business. A nonemployer business is one that has no paid employees, has annual business receipts of \$1,000 or more (\$1 or more in the construction industries), and is subject to federal income taxes.

## 2.4. Technology Eligibility

### 2.4.1. Connector Counts

The total number of eligible connectors for Communities in Charge Project Sites must meet the criteria outlined in the table below.

Reminder: Any Workplace and Multi-Family Housing project site types, whether they qualify as a Community Connection or not, shall be eligible to receive a maximum of 40 connections and all other project sites not Workplace or Multi-Family Housing project sites shall be eligible to receive a maximum of 20 connectors per eligible project site as illustrated in the table below:

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<sup>2</sup> The California Legislative code defines a “small business” as “an independently owned and operated business that is not dominant in its field of operation, the principal office of which is located in California, the officers of which are domiciled in California, and which, together with affiliates, has 100 or fewer employees, and average annual gross receipts of fifteen million dollars (\$15,000,000) or less over the previous three years, or is a manufacturer as defined in subdivision (c), with 100 or fewer employees. For the purposes of public works contracts, as defined in Section 1101 of the Public Contract Code, and engineering contracts, as described in Section 4525, for public works projects, awarded through competitive bids or otherwise, “small business” means an independently owned and operated business that is not dominant in its field of operation, the principal office of which is located in California, the officers of which are domiciled in California, and which, together with affiliates, has 200 or fewer employees, and average annual gross receipts of thirty-six million dollars (\$36,000,000) or less over the previous three years. This subparagraph shall become operative on January 1, 2019.”





# Of Eligible Connectors	All Other Sites	Multi-family Housing	Workplace Charging
Minimum	4	4	4
Maximum	20	40	40

Additional connectors may be installed above the maximums described in the table above and may count toward the total eligible costs. However, incentives will be issued only for connectors meeting project requirements.

Reminder: A Level 2 EVSE may have one or two connectors each. If two connectors can be used concurrently to charge two vehicles, then the Level 2 EVSE has two eligible connectors.

### 2.4.2. Current Equipment Requirements

Communities in Charge provides incentives for costs incurred towards the installation of Level 2 EVSEs only. DC Fast Chargers and their associated costs are not eligible for incentives through Communities in Charge. All current eligible equipment is published on the Communities in Charge website and may be accessed [here](#). All applicants/awardees are required to select eligible equipment suitable for their project site. In the event an applicant/awardee wishes to change the previously selected equipment, they must select from the most current version of the eligible equipment list at the time they request the change.

Level 2 EVSE incentivized through Communities in Charge shall:

- a) Be a new (not refurbished, not previously installed and removed) Level 2 EVSE only;
- b) Be certified by a Nationally Recognized Testing Laboratory Program (NRTL) and certified to UL 2594 standard;
- c) Be capable of charging at 6.2kW or greater;
- d) Be Energy Star certified;
- e) Be Division of Measurement Standards (DMS) California Type Evaluation Program (CTEP)<sup>3</sup> compliant and include credit card reader (for public charging with fee for use only);
- f) Be networked and support the following, at a minimum:
  - i) Network connectivity such as 4G LTE, IEEE 802.3 for Ethernet, or IEEE 802.11n for high bandwidth wireless networking;

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<sup>3</sup> Visit here for more information: CDFA - DMS - California Type Evaluation Program (CTEP)



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- ii) Ability to receive remote software updates, real-time protocol translation, encryption and decryption, Internet Protocol (IP)-based processor capable of supporting multiple protocols, and compliant with Transmission Control Protocol (TCP)/IP and IPv6;
- iii) Ability to connect to a network's back-end software.
- g) Comply with the latest SAE J-1772 technical standard;
- h) Contain a self-attestation to Open Charge Point Protocol (OCPP) v1.6 or later on their manufacturer specification sheet.

### 2.4.3. Future Equipment Requirements

The following future equipment eligibility requirements for Level 2 EV chargers will apply to applications received after the dates enumerated below. Future equipment requirements may also impact awardees requesting to modify project site equipment and such request is made after the dates enumerated below.

- a) Communities in Charge recommends EVSE manufacturers and suppliers of charging equipment prepare for compliance with the following requirements pertaining to certification by the Open Charge Alliance (OCA) by January 1, 2024 (For more information on certification through OCA, visit the [Open Charge Alliance website](#);4):
  - i) Be OCPP v1.6 certified to Core and Safety Certificates by the Open Charge Alliance; or
  - ii) Show OCPP v2.0.1 certification proof of payment; or
  - iii) Show OCPP v2.0.1 test tool report showing compliance for Core & Security.
- b) Communities in Charge recommends EVSE manufacturers and suppliers of charging equipment prepare for compliance with the following requirements by July 1, 2024:
  - i) Be ISO-15118 “Hardware ready” through self-attestation on their manufacturer spec sheet:
    - Powerline carrier-based (PLC-based) high-level communications as specified in ISO 15118-3;
    - Secure management and storage of keys and certificates;
    - Transport layer security (TLS) version 1.2; additional support for TLS 1.3 or subsequent versions is recommended to prepare for future updates to the ISO 15118 standard;
    - Remotely receiving updates to activate or enable ISO 15118 use cases;
    - Ability to connect to a network's back-end software
- b) Communities in Charge recommends EVSE manufactures and suppliers of charging equipment prepare for compliance with the following requirements by January 1, 2025:



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- i) Be OCPP 2.0.2 certified Core and Security Certificates by the Open Charge Alliance (OCA). For more information on certification through OCA, visit the [Open Charge Alliance website](#).

Communities in Charge Staff advises, in addition to the requirements for EVSE manufacturers and suppliers of charging equipment discussed in Sections 2.4.2 and 2.4.3, participants prepare for compliance with forthcoming legislation on uptime (i.e., AB 2061) which shall impact any Level 2 EVSE installed after January 1, 2024.

The items above have been included for completeness and dates may be subject to change.

## 2.5. Cost Eligibility

Application to Communities in Charge does not constitute a guarantee of award and all costs incurred are done so at the applicant's own risk. Any project costs incurred prior to September 28, 2023, are INELIGIBLE for incentives. Additionally, any incurred costs towards construction prior to November 7<sup>th</sup>, 2023, are INELIGIBLE for incentives.

Construction is considered to have begun if costs associated with mobilization have been incurred after securing an issued building permit for the Project Site in question. “Mobilization includes preparatory work and operations, including, but not limited to, those necessary for the movement of personnel, equipment, supplies and incidentals to the project site, for the establishment of all offices, buildings and other facilities necessary for work on the project, and for all other work and operations which must be performed or costs incurred prior to beginning work on the various items on the project site” (CA Pub Cont Code § 10104 (2019)).

### 2.5.1. Eligible Project Costs

The following costs are eligible for incentives:

- a) Electric vehicle supply equipment (EVSE)
- b) Transformer
- c) Electric panels
- d) Installation costs (labor and materials) including but not limited to:
  - i) Contractor labor and materials for connecting the Level 2 EVSE(s) to the electrical service;
  - ii) Utility new service request or make-ready, if applicable for the installation site;
  - iii) Planning and engineering design (Architecture studies, site survey, underground utilities, site layout, signs, placards, markings) costs such as development of drawings and plans meeting the Americans with Disabilities Act (ADA) requirements for the site;



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- iv) Necessary project signage. (e.g., price signs, appropriate Federal stickers and decals,<sup>5</sup> parking signs according to local building codes, etc.).
- e) Network agreement with network provider (e.g., network agreements with EV network provider)
- f) Extended equipment warranties, purchased from equipment manufacturer or one of their authorized contractors ONLY. Third party equipment warranties are not an eligible project cost. The Applicant shall not be the issuer of an equipment warranty.
- g) Operations and Maintenance Contracts. The Applicant shall not be the issuer of an Operations and Maintenance Contract.
- h) Stub-outs
- i) Design, engineering, and utility service costs (responsible by the awardee). All requests for reimbursement related to utility upgrades must be accompanied by official utility invoicing;
- j) Required ADA upgrades to site due to EV deployment, but not to include or cover upgrades of existing ADA non-compliance
- k) Demand management equipment

### 2.5.2. Ineligible Project Costs

The following costs (not a comprehensive list) are explicitly ineligible for incentives and may not receive funding from Communities in Charge, however project sites may seek alternative funding sources to help finance these costs. CALSTART may follow up with applicants to ensure costs are reasonable, necessary, and consistent with eligibility guidelines described here.

- a) Clerical costs associated with completing application paperwork, phone calls, or tasks related to submitting program required materials to the IPC;
- b) Upgrades to utility-owned electrical infrastructure (the percentage of total costs covered by the utilities) is not eligible for reimbursement. However, the percentage of total costs for which the Awardee is responsible, is an eligible project cost. All requests for reimbursement related to utility upgrades must be accompanied by official utility invoicing;
- c) Fees paid to Authorities Having Jurisdiction (AHJs) for permitting;
- d) Costs to fund stand-alone energy generation, such as Battery Energy Storage Systems (BESS) or Photovoltaic (PV) solar. These must be solely tied to the charger and metered separately from the site host building;
- e) Profit to the applicant organization;

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<sup>5</sup> Visit here for more information: [Zero-Emission Vehicle Signage](#) | Caltrans



- f) Costs associated with ensuring compliance with state or federal building codes, including provisions of the California Green Building Standards Code requiring the installation of a minimum amount of electric vehicle supply equipment, EV Capable, or EV Ready parking spaces.

### 2.5.3. Additional Cost Considerations

Communities in Charge allows combining incentives with State, Federal, and other available grant, or funding opportunities for which the Applicant or Project Site may be eligible.

Applicants may not receive incentives in excess of total project costs, nor shall incentives exceed the value of a given piece of equipment. For instance, should Applicants participate in a non-CEC grant program and receive 50% of cost coverage towards an EVSE through said program, they shall not receive an amount in excess of the remainder from Communities in Charge. Applicants shall be required to show documentation confirming their compliance.

Project incentives shall not:

- a) Be used in conjunction with other active funding from the California Energy Commission for EV charging infrastructure. Project sites where there were past awards for completed projects are acceptable as long as costs do not overlap.
- b) Be used in conjunction with a site that is currently receiving funding from Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), or Los Angeles Department of Water and Power (LADWP) for EV charging infrastructure. Other municipal and local utility incentives are acceptable.
- c) Be in excess of 75% of costs incurred. All invoices submitted must include the invoice date and an itemization of eligible costs, credits, discounts, and incentives as applicable.
- d) Exceed the value of a given piece of equipment.

## 3. Incentive Structure & Application Scoring

### 3.1. Incentive Amounts

Incentives for Level 2 EVSE charging infrastructure are provided up to the amounts shown in the table below. Applicants may qualify for the base incentive, at a minimum, and payment amounts shall be determined by the total eligible project costs (Eligible Costs may be found in 2.5.1.). **NOTE:** In efforts to increase applicant diversity and allow for all applicants to be competitive, no single entity may receive more than 25% of the total funding available.



Eligible Incentives for Level 2 EVSE	Amount Per Eligible Connector
Base Incentive	Up to \$3,500, or 75% of eligible costs, whichever is less
Multi-family Housing Project Site	Additional \$3,500.
Project Site for Tribal government, Tribal entity, or non-governmental organizations serving Tribal communities	Additional \$3,500.

(Example: An eligible Applicant whose Multi-Family Housing Project Site is located on Tribal lands may be eligible to receive \$10,500 per eligible connector, or 75% of eligible costs, whichever is less.)

### 3.2. Award Priority and Project Readiness

Applicants must provide documents indicating their project’s level of readiness. Once submitted, applications will be sorted by project Readiness Tier. Project readiness shall be determined consistent with the manner outlined in the table below.

Priority	Readiness Tier	Documents Provided at Time of Application
Awarded First	Tier 1	Site Verification Form + Final Site Design + <i>Issued Building Permit</i>
Awarded Second	Tier 2	Site Verification Form + Final Site Design + <i>Building Permit Application</i>
Awarded Third	Tier 3	Site Verification Form + <i>Preliminary Site Plans</i>

Should a Project Site’s local Authority Having Jurisdiction not require a Final Site Design to obtain their Final Permit, then the Permit and a Letter from the Project Site’s local Authority Having Jurisdiction should be uploaded at the point of application, stating that a drawing was or is not necessary to issue a Final Building Permit for the Project Site in question.



### 3.3. Rubric Score

In addition to sorting by project readiness, applications will be scored based upon the physical location of the Project Site, and the degree to which it may serve a pre-defined Community Connection. Additionally, letter(s) of support may be included to illustrate engagement with the local community this project is aimed at serving. Once application materials have been submitted and verified, they shall be scored using the rubric below.

Community Connection	Points Awarded (Max of 10)
Project Site is a defined Community Connection	10
Priority Populations Designation	Points Awarded (Max of 5)
DAC and LIC, or Tribal and LIC	5
DAC or Tribal Only	4
LIC Only	3
Local Support	Points Awarded Per Letter (Max of 3 per application)
Letter of Support from Community-Based Organization serving the same community as the Project Site	1
<b>Maximum Possible Points Per Application:</b>	<b>18</b>

## 4. Award Priority & Selection

### 4.1. Determining Awardees

Incentive funds will be distributed across four regions: Northern, Southern, Central and Eastern. Each region has been assigned a proportion of funds based upon regional population, proportion of area represented by DAC/LIC census tracts, and historical investment of funds from past incentive programs., including CALeVIP 1.0 funding for Level 2 chargers. The table below illustrates the proportionality of funding available for each region during Funding Wave 2:

Region	Proportion of Funds
Northern	\$8,000,000
Southern	\$11,000,000
Eastern	\$7,000,000
Central	\$12,000,000



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Applications will be sorted by Project Site region, Project Readiness Tier, and rubric score. Applicants will be ranked by Readiness Tier, from highest total rubric score to lowest within their region and selected for award based on their rank and available funding within said region. The projects will be awarded until funding is fully exhausted, or no further applications exist within that region.

Ties shall be broken by random lottery amongst those of identical Readiness Tiers and Rubric Scores. All Tier 1 applications in each region will be given funding priority before moving to Tier 2 and Tier 3 awards. Applications may also be considered for partial award.

(Example: Project 1 can fully fund applications with Tier 1 Readiness and Rubric Scores with 9 points and higher in the Southern region. There is a tie for multiple Southern region applications in this Tier with a Rubric Score of 8. Southern region applications with Rubric Scores of 8 within this Readiness Tier are chosen by random lottery until no further applications can be funded.)

The table below illustrates how awardees shall be determined.

Award Order	Regions			
	Northern	Southern	Central	Eastern
First	Readiness: Tier 1 Rubric Score: Highest to Lowest	Readiness: Tier 1 Rubric Score: Highest to Lowest	Readiness: Tier 1 Rubric Score: Highest to Lowest	Readiness: Tier 1 Rubric Score: Highest to Lowest
Second	Readiness: Tier 2 Rubric Score: Highest to Lowest	Readiness: Tier 2 Rubric Score: Highest to Lowest	Readiness: Tier 2 Rubric Score: Highest to Lowest	Readiness: Tier 2 Rubric Score: Highest to Lowest
Third	Readiness: Tier 3 Rubric Score: Highest to Lowest	Readiness: Tier 3 Rubric Score: Highest to Lowest	Readiness: Tier 3 Rubric Score: Highest to Lowest	Readiness: Tier 3 Rubric Score: Highest to Lowest

## 4.2. Contingency List

Applicants meeting minimum requirements for Tiers 1, 2, or 3 may be retained on a Contingency List for up to 120 calendar days following distribution of Notices of Award. Depending on an Applicant’s rubric score and their readiness tier (at the time of their application), they may be selected for award in the event of cancellations, increased funding, and other unforeseen circumstances. Contingency lists will not carry forward to subsequent incentive projects. Any unawarded funds may be apportioned to subsequent incentive projects.





## 4.3. Ensuring Equitable Funds Distribution

The CALSTART Project Team aims to assure equitable distribution of incentive funds, including no less than 50% of Project funds awarded to Project Sites in DACs or LICs across the State. To ensure this is met, CALSTART may withhold Notices of Final Award from Project Sites outside a DAC or LIC until at least 50% of available incentives have been secured for sites within a DAC or LIC. To accomplish this, CALSTART may need to selectively choose applications for Project Sites located in a DAC or LIC that have a lower Rubric Score and otherwise might not have been funded.

*Example:*

*If the incentives available for Funding Wave 2 would be exhausted by funding the entirety of applications meeting Tier 1 Readiness, but only 40% of project funds would go towards Project Sites located in a DAC or LIC, then CALSTART would take the following steps:*

- 1) Award only Tier 1 Readiness applications with Project Sites located in a DAC/LIC.
- 2) Select from Readiness Tiers 2 and 3 in descending order of their Rubric Score, until at least 50% of project funds have been awarded to Project Sites located in a DAC/LIC.
- 3) Using any remaining incentives, CALSTART would then return to awarding applications from Readiness Tier 1 in descending order of their Rubric Score.

## 5. Application Process

### 5.1. Application Window

- a) Before Applying: Applicant may register on the Communities in Charge website through the Incentive Processing Center (IPC), the online application portal for Communities in Charge, prior to the application window opening.
- b) During Application Window: Applicants have from 11/7/2023 to 12/22/2023 to submit their application materials. Application materials consist of, but are not limited to:
  - i) Site Verification Form with precise location of Project Site, including the installation address, city, state, zip code, parcel number (if applicable), and latitude/longitude (if applicable).
  - ii) Completed copy of the Job Site Installation Form, indicating number and type of eligible Level 2 EVSEs requested and whether construction has begun.
  - iii) Community Connections documentation (if applicable)
  - iv) Letters of support (if applicable). Letters of support must include a point of contact to be verified by CALSTART and information sufficient for verification of CBO status. CALSTART may develop a template letter. CALSTART may follow up and verify letters of support at any time.



## 5.2. Notices of Award

- a) *Notice of Final Award*: Applications meeting all project requirements for Readiness Tier 1, if selected for an award, will be provided a *Notice of Final Award (funding permitting)*.
- b) *Notice of Conditional Award*: Applications meeting all project requirements for Readiness Tiers 2 or 3, if selected for an award, will be provided a *Notice of Conditional Award (funding permitting)*. Awardees have 90 calendar days from receipt of their *Notice of Conditional Award* to submit their Issued Building Permit and Final Site Design. Upon receipt and verification of these documents, Awardees shall be granted a *Notice of Final Award*. The Project Team will contact Applicants whose submission was incomplete (e.g., missing signature, documents unreadable, etc.).
- c) Recipients of all *Notices of Award* are required to have a duly authorized and empowered individual sign and execute their *Incentive Recipient Agreement*, legally binding said recipients in an operational and financial capacity to the requirements and obligations set forth under Communities in Charge. The *Incentive Recipient Agreement* will be distributed with the Notice of Award to all awardees through the IPC. All awardees who do not execute the Incentive Recipient Agreement and return to CALSTART within 14 days of receipt, may be subject to forfeiture of their award with Communities in Charge.
- d) Only those applicant organizations provided with a *Notice of Final Award* and who have signed and executed an *Incentive Recipient Agreement* may be eligible to receive incentive payments.

## 5.3. Incentive Payments

- a) Final Payment: Awardees have 270 calendar days (9 months) from receipt of their *Notice of Award* (Conditional or Final) to complete their Project Site and provide the following documentation to the CALSTART Project Team:
  - i) Completed copy of invoices - These include the invoice date and itemization of eligible costs, credits, discounts, and incentives received, as applicable.
  - ii) Signed copy of Job Site Installation Form - This signed affidavit by the Applicant acknowledges compliance with prevailing wage requirements, ensures use of licensed contractors in good standing, and abidance by EVITP requirements including name and EVITP Certification Number of each technician.
  - iii) Signed copy of Final Inspection Card by appropriate AHJ.
  - iv) Signed copy of paid and executed Network Agreement form - This includes cost, duration, and terms of the agreement.
  - v) Photos of installed equipment, including serial numbers.
- b) Request for payment of any kind must be accompanied by supporting documentation. This documentation may include but shall not be limited to:



- i) Proof of incurred direct labor costs including labor hours supported by time records, documentation supporting labor rates, and payroll registers;
- ii) Proof of direct incurred equipment costs including itemized listings of equipment billed, amounts billed supported by vendor invoices, receipts or other relevant third-party documentation, documentation supporting ownership (such as title) as applicable, copies of cancelled checks/bank statement, and any other documents deemed relevant;
- iii) Proof of incurred other costs including itemized listing of other direct costs and amounts billed, amounts billed supported by vendor invoices, receipts, or other relevant third-party documentation, and copies of cancelled checks/bank statement;
- iv) Proof of burden rates (Fringe benefit) including rates supported by methodology in which rates are derived and applied.

All document submissions and requests, including requests for payment from Awardees, shall be made through the Incentive Processing Center.

## 6. Duties and Responsibilities

### 6.1. Applicant Responsibilities

An Applicant is responsible for submitting their incentive application and providing all required documentation to CALSTART. Eligible Applicants must accept the incentive directly – Communities in Charge does not provide an option to assign the incentive to a third party.

Communities in Charge reserves the right to limit eligibility of Applicants with bankruptcies, threatened or pending legal actions, loan defaults, or judgements as determined to protect the best interest of the Project.



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Additional requirements for Applicants shall include but not be limited to:

- a) Must comply with all US federal, California state, local safety, permitting, zoning, and other guidelines;
- b) Must ensure all equipment is installed by a qualified and licensed contractor in good standing with the [Department of Consumer Affairs Contractors State License Board \(CSLB\)](#), and that this installation is in accordance with US federal, CA state, and local codes and abide by all permitting and inspection requirements;
- c) Must comply with all portions of [California's Prevailing Wage Law](#), including paying prevailing rate of per diem wages and the general prevailing wage rate for holiday and overtime work in the locality in which the work is to be performed for each craft and type of worker needed. It shall be mandatory upon the General Contractor, and upon associated vendors thereunder, to pay no less than said specified rates to all workers employed by them in execution of the contract for which an incentive was awarded to the Applicant. Every application is subject to potential audit for Prevailing Wage compliance prior to any payment of incentive funds. The payee shall have certified payroll records and retain the supporting documentation as required by law as evidence of compliance;
- d) Must use [Electric Vehicle Infrastructure Training Program \(EVITP\)](#) certified electricians for the installation of the Level 2 EVSEs according to the following requirements:
  - i) If the electric vehicle charging infrastructure and equipment to be installed supplies charging ports with 24.9 kW or less and no charging ports supplying 25 kW or more, then it will be installed by a contractor with an appropriate license classification, as determined by the Contractors' State License Board, in good standing, with at least one electrician on each crew at all times during work hours who holds an Electric Vehicle Infrastructure Training Program (EVITP) certification;
  - ii) If the electric vehicle charging infrastructure and equipment to be installed supports at least one charging port supplying 25 kW or more, then it will be installed by a contractor with an appropriate license classification, as determined by the Contractors' State License Board, in good standing, with at least 25 percent of the total electricians working on the crew, at all times during work hours, holding EVITP certification.
- e) Must maintain electric vehicle charging station and real property insurance as required by law. If the installed and commissioned infrastructure is damaged, destroyed, or otherwise becomes permanently inoperable due to accident or negligence by the Applicant or any other party, the Applicant must notify Communities in Charge Staff;



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- f) Must report project delays in a timely manner to Communities in Charge Staff in accordance with the Terms and Conditions. Failure to do so shall place the Applicant at risk of noncompliance and forfeiture of any incentive payments made to date or in the future;
- g) Must ensure the connected EV equipment shall be maintained and operated for a period of no less than 24 months (2 years) from the date of final commissioning;
- h) Must maintain a network service agreement for the Level 2 EVSEs for a period of no less than 24 months (2 years) from the date of final commissioning;
- i) Must provide CALSTART with no less than 24 months (2 years) of Level 2 EVSE usage data in accordance with the data collection requirements outlined within this Implementation Manual, Section 6.2.2. CALSTART may implement a mechanism to streamline the transfer of required data;
- j) Must submit reports and respond to surveys put forth by Communities in Charge Staff for a period of 36 months (3 years). The foregoing reports and surveys may be prompted by Communities in Charge emails ([communitiesincharge@calstart.org](mailto:communitiesincharge@calstart.org)) or through the IPC, and the Applicant must respond by any stipulated deadlines contained therein;
- k) Must be available for follow-up inspection if requested by Communities in Charge Staff, CEC, or CEC's designee;
- l) Must disclose all sources of funding and incentives used in combination with Communities in Charge incentive funds;
- m) Through submission of an application to the Project, Applicants must agree to allow the California Energy Commission to utilize application data for publicly available data tools, included, but not limited to, the Energy Commission's Cost Transparency Tool;
- n) Must ensure the accuracy of the information on all incentive applications and required documentation submitted. Submission of false information on any required documents may be considered a criminal offense and is punishable under penalty of perjury under the laws of the State of California;
- o) Must comply with AB 2061 requirements including ensuring a minimum of 97% uptime of all Level 2 EVSEs receiving Communities in Charge Incentives for six years, as defined in the Terms and Conditions;
- p) Must ensure the Level 2 EVSEs remain in service at the Project Site for a minimum of 24 months (2 years) from the date of final commissioning;
- q) Through submission of an application to Communities in Charge, Applicants must agree to complete all required application documentation in accordance with the guidance provided in this Implementation Manual, by Communities in Charge Staff, and the Terms and Conditions. Applicants must further agree that Communities in Charge Staff reserves all rights and remedies available under the law to enforce the requirements of the Project and may report breaches and



noncompliance by any participant to the California Energy Commission for legal recourse. This may include but shall not be limited to repayment of past incentives and suspension or termination of an Applicant's Notice of Award.

## 6.2. Data Collection Responsibilities

Each Applicant must facilitate and enable data collection on deployed infrastructure equipment, reported annually, starting from the date of final commissioning. Electric Vehicle Service Providers (EVSPs) or Network Providers shall pursue automated approaches to reporting said data for accuracy of reporting and streamlined processing for all parties involved. Please ensure that your selected network provider is prepared to meet the necessary data collection requirements detailed in this Implementation Manual.

### 6.2.1. Programmatic Data Collection

The following data parameters concerning overall project participation in Communities in Charge shall be collected through the IPC from each submitted application:

- a) Quantity (number), type, date, and location of charging equipment installed
- b) Nameplate capacity of the installed equipment, in kW
- c) Number and type of connectors per Level 2 EVSE
- d) Location type, such as street, parking lot, hotel, restaurant, or multi-family housing
- e) Total cost per connector, including any federal subsidies, utility subsidies, Communities in Charge incentives, and any privately funded share per connector

### 6.2.2. Level 2 EVSE Usage Data Collection

CALSTART will request data on throughput, usage, and operations of Level 2 EVSEs receiving incentives from Communities in Charge. The goal of this is to collect operational data from Project Sites and to analyze that data for economic and environmental impacts. The Applicant shall:

- a) Ensure data is provided to CALSTART at least annually upon final commissioning of the installed Level 2 EVSEs;
- b) Provide CALSTART with the following data using 15-minute intervals, at a minimum, from the usage of the Level 2 EVSEs:
  - i) EVSE ID
  - ii) Port ID
  - iii) Port maximum (in kW)
  - iv) Connection start/end date (MM/DD/YYYY)
  - v) Connection start/end time (HH/MM/SS)



- vi) Charge session start/end date (MM/DD/YYYY)
  - vii) Charge session start/end time (HH/MM/SS)
  - viii) Energy consumed (in kWh)
  - ix) Vehicle make, model and year
  - x) Interval ID
  - xi) Interval peak demand (in kW)
  - xii) Interval start/end date (MM/DD/YYYY)
  - xiii) Interval start/end time (HH/MM/SS)
  - xiv) Interval average demand (in kW)
  - xv) Idle duration
  - xvi) Uptime
  - xvii) Downtime reason
  - xviii) Event start/end date (MM/DD/YYYY)
  - xix) Event start/end time (HH/MM/SS)
- c) Comply with requests by CALSTART to obtain the foregoing data in a format and frequency that is acceptable to CALSTART and CEC.

The forgoing data parameters may be updated and are therefore subject to change.



## 7. Table of Acronyms

Acronym	Description
ADA	Americans with Disabilities Act
AHJ	Authority Having Jurisdiction
BEV	Battery Electric Vehicle
CBO	Community-Based Organization
CEC	California Energy Commission
CTEP	California Type Evaluation Program
DAC	Disadvantaged Community
EV	Electric Vehicle
EVITP	Electric Vehicle Infrastructure Training Program
EVSE	Electric Vehicle Supply Equipment
EVSP	Electric Vehicle Service Provider
GVWR	Gross Vehicle Weight Rating
IEEE	Institute of Electrical and Electronics Engineers
IOU	Investor-Owned Utilities
IP	Internet Protocol
IPC	Incentive Processing Center
ISO	International Organization for Standardization (ISO)
kW	Kilowatts
LIC	Low-Income Community
NRTL	Nationally Recognized Testing Laboratory
OCA	Open Charge Alliance
OCPP	Open Charge Point Protocol
PHEV	Plug-In Hybrid Electric Vehicle
PLC	Power Line Carrier
SAE	Society of Automotive Engineers
TCP	Transmission Control Protocol
TLS	Transport Layer Security