



COMMUNITIES
IN CHARGE

Cost Reimbursement Webinar

Funding Wave 2



Zoom Logistics

Webinar URL:

<https://us06web.zoom.us/j/86552266019>

Webinar ID: 8865 5226 6019

Mobile:

+16699006833,,86552266019# US (San Jose)

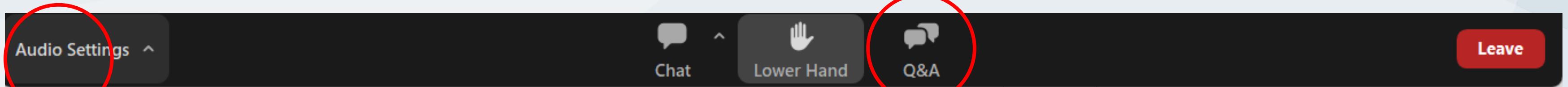
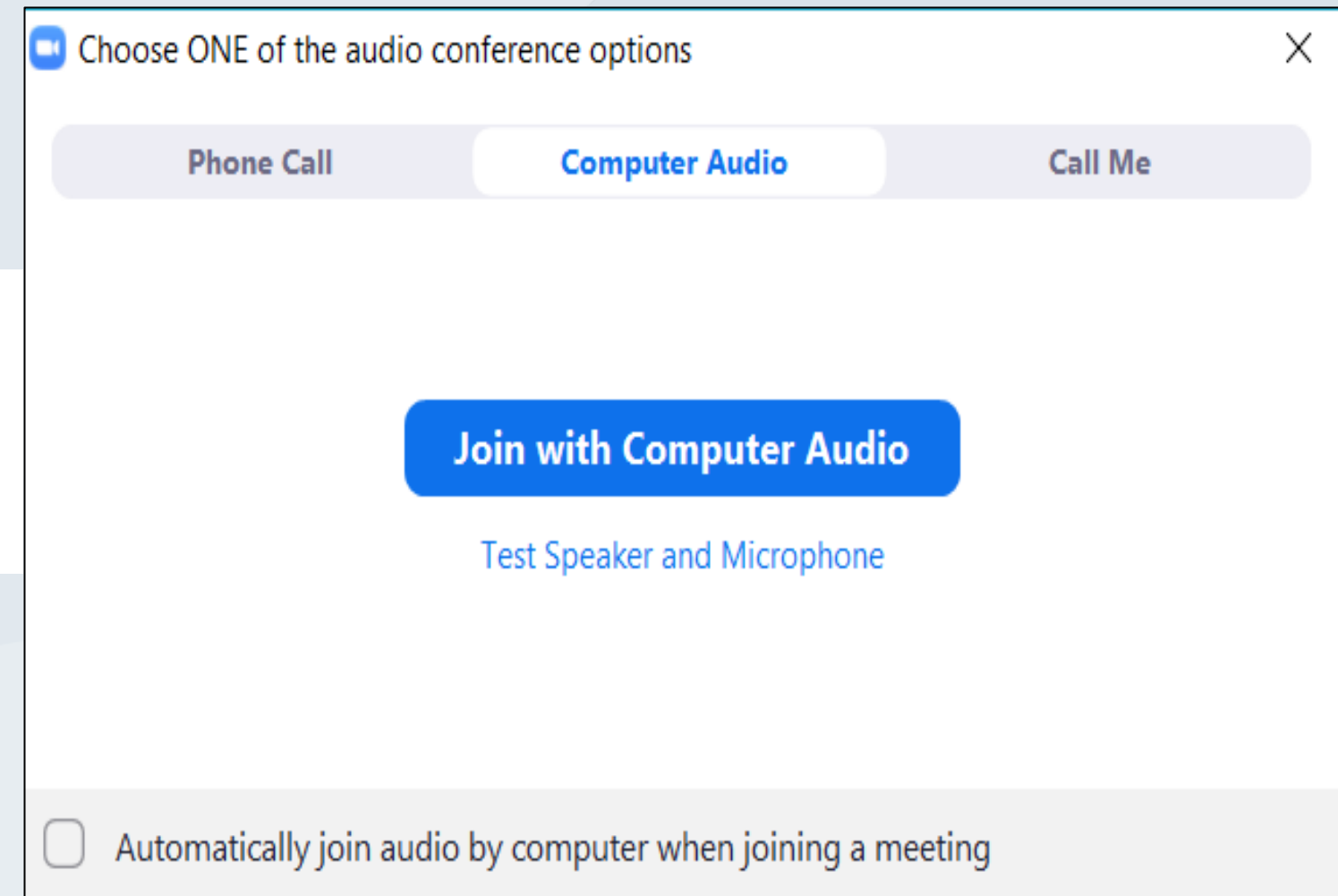
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Dial by your location

669 900 6833

669 444 9171

If you dial-in from a phone, use the meeting ID and passcode from invite



All participants (web and dial-in) are automatically in listen-only mode.

If you have questions, you can use the Q&A function.

Agenda

Project Overview

Incentive Recipient Agreement Breakdown

Eligible Costs Overview

Cost Definitions and Additional Considerations

Incentive Processing Center

Submitting Invoices

Timeline for final payment

Communities in Charge Project Overview



Communities in Charge is California's market-accelerating, light-duty electric vehicle (EV) charging incentive project



Funded by the California Energy Commission's Clean Transportation Program, implemented by CALSTART, and supported in partnership with GRID Alternatives and Tetra Tech



Communities in Charge is designed to transform EV accessibility, rapidly catalyze new markets, and swiftly deploy Level 2 EV charging stations



\$30 Million available for 3rd funding wave!

Communities in Charge Project Partners



Implementor



Funder



Equity and Outreach
Partner



Incentive Processing

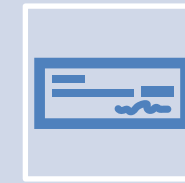
Objectives



Review eligible costs that qualify for reimbursement when submitting for a final payment



Offer best practices on how to submit necessary documents through the Incentive Processing Center



Set clear guidelines for invoices and other documents needed for successful verification



Share helpful tips and identify common mistakes to best avoid them



Review submission deadlines and the expected payment schedule

Target Audience

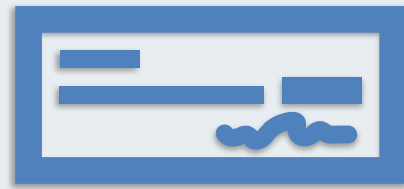


Applicants who were selected for Final and Conditional Awards for the Second Funding Wave



Prospective applicants who want more insight on the reimbursement processes for future participation in Funding Waves

Reminders



Funding Wave 2 Awardees may no longer submit a request for Midpoint Payment.



Conditional Awardees have 90 days from award to submit permits and plans. If you have not completed this, please reach out at your earliest convenience.



To receive a final payment, you must have signed the Incentive Recipient Agreement for each award.

Disclaimer

The content contained herein are examples provided for informational purposes and to aid overall participation in the Communities in Charge incentive Project.

None of the information contained herein shall be considered financial advice. Please verify your expenses with your Accounting team.



Incentive Recipient Agreement

Incentive Recipient Agreement (IRA)

Awardees are required to execute an Incentive Recipient Agreement (IRA) between the Awardee organization and CALSTART prior to submitting a payment request.

- The IRA outlines all expectations, eligibility requirements, duties and responsibilities which Awardees must comply with. This includes any terms and conditions.
- Awardees that do not execute the IRA will not be eligible to receive funding.

Who signs the IRA?

The organizations Authorized Signatory is the proper party to execute the Agreement. Please ensure this field is up to date on your profile in the IPC.

How will the IRA be distributed?

The IRA shall be distributed directly to Awardees via their email on record. The Awardee must execute the Agreement by electronic signature and return to CALSTART.



Cost Eligibility Overview

Eligible Project Costs

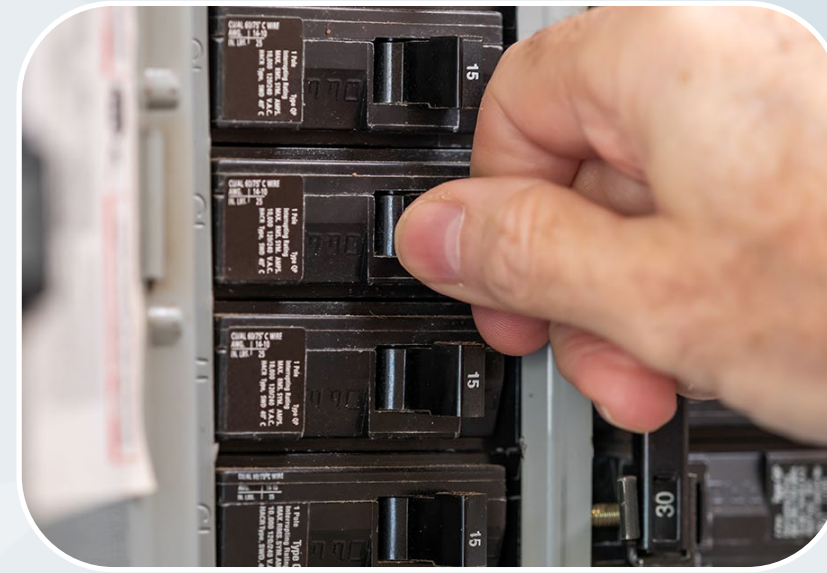
The following costs may be included in total project costs as part of the same Project Site. Any costs incurred at a different Project Site are ineligible:



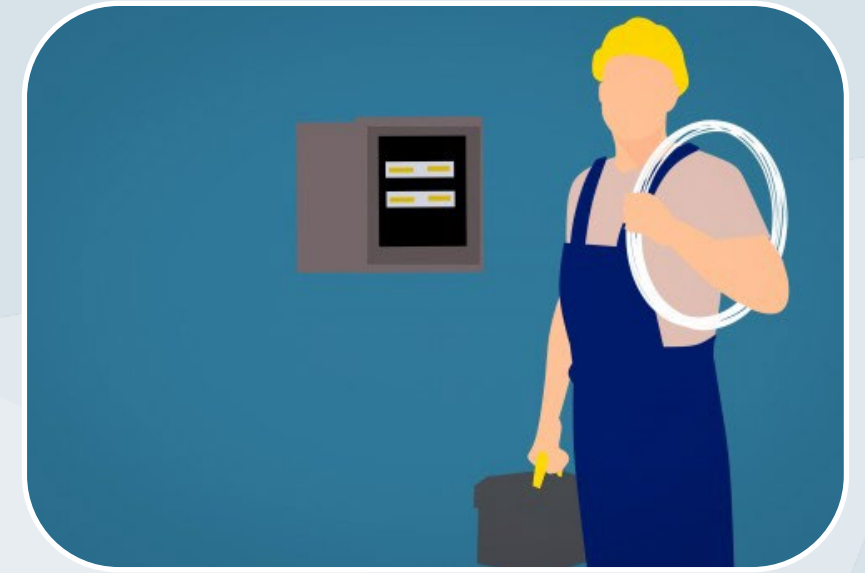
Electric vehicle
supply equipment
(EVSE)



Transformer



Electric panels



Installation costs

*For a complete listing of eligible and ineligible project costs, please consult the Communities in Charge Implementation Manual. None of the information contained herein shall be considered financial advice. Please verify your expenses with your Accounting team.

Eligible Project Costs

The following costs may be included in total project costs as part of the same Project Site. Any costs incurred at a different Project Site are ineligible:



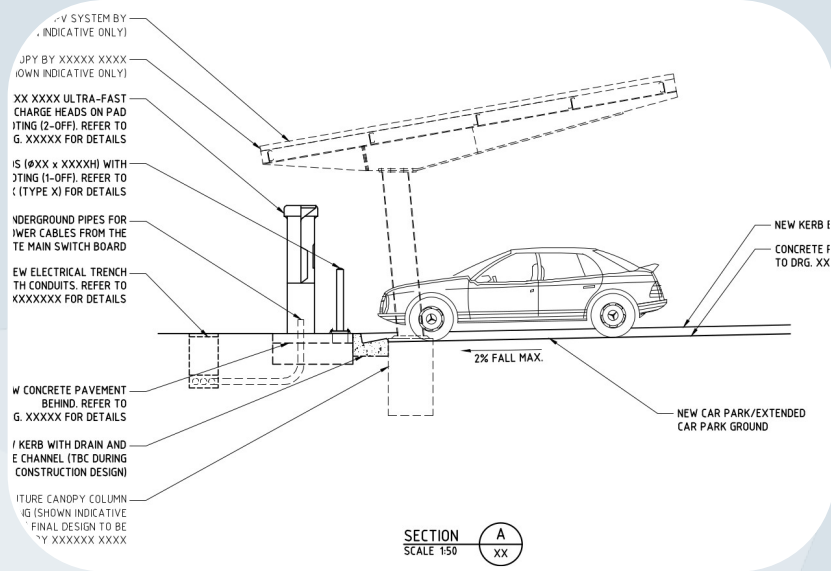
Network agreement with EV network provider



Extended equipment warranties, purchased from equipment manufacturer or one of their authorized contractors ONLY



Stub-outs



Design, engineering, and utility service costs

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Eligible Project Costs

The following costs may be included in total project costs as part of the same Project Site. Any costs incurred at a different Project Site are ineligible:

Operations and Maintenance
Contracts

Required ADA upgrades to site
due to EV deployment, but not
to include or cover upgrades of
existing ADA non-compliance

Demand Management
Equipment

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Ineligible Project Costs

Ineligible project costs may include, but are not limited to:

- Indirect costs
- G&A
- Compensation for work associated with completing required application processes
- Upgrades to utility-owned electrical infrastructure
- Fees paid to Authorities Having Jurisdiction (AHJs) for permitting
- Costs to fund stand-alone energy generation, such as solar panels
- Costs associated with bringing a site into compliance with California State or US Federal building codes (including ADA) which are not directly associated with the Level 2 EVSEs installed
- Any project costs incurred prior to **9/28/2023**, are INELIGIBLE for incentives
- Profit to the applicant organization

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Cost Definitions & Additional Considerations

Definitions

- **Direct costs:**

- Allowable costs incurred that can be attributed to a specific final cost object. For labor, must provide proof of hours worked directly on the project (Example: Timesheets)
- Examples:
 - Labor used exclusively for the installation of EVSE paid at prevailing wage is a direct cost.
 - The cost of the EVSE is a direct cost.
 - Network Agreement purchased for the EVSE is a direct cost.

- **Fringe Benefits:**

- Directly benefits the employee of the organization that performs the labor.
- Applied to direct labor.
- Rate is derived by taking total salaries and wages divided by total fringe benefits.

- **Incurred costs:**

- Invoiced costs to the Applicant for planning, installation, construction, and deployment of Level 2 EVSE infrastructure at an eligible Project Site
- 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.
- Example:
 - Equipment invoice dated September 27, 2023, but was paid on October 1, 2023, is an incurred costs but is not eligible because the date it was invoiced is before the incurred cost date (September 28, 2023).

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Examples of Direct Costs

- Subcontractor costs
- Project management
- Equipment costs
- Network costs
- Direct Labor

G&A and Indirect are not considered direct costs and are therefore ineligible for reimbursement under Communities in Charge.

Examples of Fringe Benefits

- Paid time off
- Sick Pay
- Social Security, Medicare, Unemployment Insurance
- Pension or retirement plans
- Workers' compensation
- Healthcare, etc.



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Compliance with Prevailing Wage Requirements

All participants in Communities in Charge shall comply with all portions of [California's Prevailing Wage Law](#)

- Under the prevailing wage requirements in California, “all workers employed on public works projects must be paid the prevailing wage determined by the Director of the Department of Industrial Relations, according to the type of work and location of the project.”
- Does my project qualify as a “public works project?”
 - As defined by the Department of Industrial Relations, public works means:
 - Construction, alternation, demolition, installation, or repair work done under contract and paid in whole or in part out of public funds.
 - It can include preconstruction and post-construction activities related to a public works project.
 - For a full definition of public works refer to [Labor Code Section 1720](#).
- Anyone working on a public works project must be paid prevailing wages as determined by DIR. Projects of \$30,000 or more must meet DIR’s apprenticeship requirements. Failure to comply with public works requirements can result in civil penalties, criminal prosecution, or both.

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EVITP Requirements

Communities in Charge requires all Awardees must use [Electric Vehicle Infrastructure Training Program \(EVITP\)](#) certified electricians for the installation of the Level 2 EVSEs according to the following requirements:

- 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;
- 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.

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Submitting a Payment Request Through The Incentive Processing Center (IPC)

Navigating the Incentive Processing Center (IPC)



When submitting for Final Payment, all awardees will submit the **Payment Request Form** and all required additional documentation through the IPC. The Payment Request Form is available on the Communities in Charge website under the 'Resources' Tab in "All Documents."



Each awardee will login to the IPC using the same login credentials created when setting up an account for application submission. Once logged on, please follow the steps outlined on the following slides when submitting documentation.

*For a complete listing of eligible and ineligible project costs, please consult the Communities in Charge Implementation Manual. None of the information contained herein shall be considered financial advice. Please verify your expenses with your Accounting team.

Navigate to the Communities in Charge website, which may be accessed [here](#).

Login to Communities in Charge through the Incentive Processing Center [here](#).

A login form for Communities in Charge. It includes the logo, a "Username" field, a "Password" field, a "Log in" button, and a link for "Forgot your password? Not a member?".

Please see below walk through video of the IPC





Submitting Invoicing for Final Payment

Submitting Proper Documentation for Reimbursement

WHAT: Awardees must complete their project and submit a Final Payment Request with all requisite documentation within **270 calendar days** from receipt of their Notice of Award.

- Completed copy of invoices - These include the invoice date and **itemization of eligible costs, credits, discounts, and incentives received**, as applicable.
- Proof of Payment – In form of a cancelled check (Front and Back of check) , ACH Form and Bank Statement, or Credit Card Statement.
- Signed copy of Job Site Installation Form - This certifies 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.
- Signed copy of Final Inspection Card by appropriate AHJ.
- Signed copy of paid and executed Network Agreement form - This includes cost, duration, and terms of the agreement.
- Photos of installed equipment, including serial numbers.

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Best Practices

Submitting Proper Documentation for Reimbursement (Cont'd)


COMMUNITIES IN CHARGE		Final Payment Request Form		
Agreement #		DATE		
Award ID <small>(found in Notice of Award email)</small>	Magnitude of Award <small>(found in Notice of Award email)</small>	Application ID		
Recipient Information				
Recipient Name				
Organization Name				
Organization Address Line 1				
Organization Address Line 2				
Primary Contact Phone				
Primary Contact Email				
Request Type <small>(Midpoint or Final)</small>	Fill out this section ONLY if you are submitting a Midpoint Payment.			
Midpoint Payment				
Description of Invoice <small>(add additional rows for additional invoices)</small>	Award Total	Incurred Costs this Invoice	Incurred Costs to Date	Award Balance
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Total	\$0.00	\$0.00	\$0.00	\$0.00
Amount payable to applicant		\$0.00		
Request Type <small>(Midpoint or Final)</small>	Fill out this section ONLY if you are submitting a Final Payment.			
Final Payment				
Description of Invoice <small>(add additional rows for additional invoices)</small>	Award Total	Incurred Costs this Invoice	Incurred Costs to Date	Award Balance
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Invoice # XXXXXXXX		[FILL IN]		
Total	\$0.00	\$0.00	\$0.00	\$0.00
Amount payable to applicant		\$0.00		

WHERE: The Payment Request form is available on the Communities in Charge website under the 'Resources' tab in 'All Documents,' which can be accessed [here](#).

Once the Form has been completed, please submit the Form and all required supporting documentation to the IPC.

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Submitting Proper Documentation for Reimbursement (Cont'd)

 COMMUNITIES IN CHARGE /Final Payment Request Form

Agreement #		DATE	
Award ID <small>(found in Notice of Award email)</small>	Magnitude of Award <small>(found in Notice of Award email)</small>	Application ID	
Recipient Information			
Recipient Name			
Organization Name			
Organization Address Line 1			
Organization Address Line 2			
Primary Contact Phone			
Primary Contact Email			
Request Type <small>(Midpoint or Final)</small>	Fill out this section ONLY if you are submitting a Midpoint Payment.		
Midpoint Payment			
Description of Invoice <small>(add additional rows for additional invoices)</small>	Award Total	Incurred Costs this Invoice	Incurred Costs to Date
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Total	\$0.00	\$0.00	\$0.00
Amount payable to applicant		\$0.00	
Request Type <small>(Midpoint or Final)</small>	Fill out this section ONLY if you are submitting a Final Payment.		
Final Payment			
Description of Invoice <small>(add additional rows for additional invoices)</small>	Award Total	Incurred Costs this Invoice	Incurred Costs to Date
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Invoice # XXXXXXXX		[FILL IN]	
Total	\$0.00	\$0.00	\$0.00
Amount payable to applicant		\$0.00	

Best Practices

Please submit a complete Payment Request Form with all Invoice amounts clearly stated. Must be dated and signed.

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Invoicing Requirements

Proof of Incurred Direct Labor Costs Shall Include:

- Costs incurred within the period eligible for incurred costs
- Labor hours supported by daily time records
- Documentation supporting labor rates (paystub and payroll registers)

Proof of Direct Incurred Equipment Costs Shall Include:

- Itemized listing of equipment billed
- Amounts billed supported by vendor invoices, receipts or other relevant third-party documentation
- Documentation supporting delivery of equipment (such as bill of lading)
- Proof of Payment needed for purchases above \$5,000.
- Any other documents deemed relevant

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Invoicing Requirements

1) Invoices for Incurred Costs

Make sure that all invoices submitted for reimbursement include the following:

- Vendor Information
- Paid by Applicant (no Quotes)
- Site Address Noted

Itemized list of Total Cost Breakdown

- You may also include a supplementary document made by the applicant that further clarifies the charges made. Please clarify any special circumstances here.

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Invoicing Requirements Continued

2) Equipment Costs

Documents submitted referencing Equipment Costs must include the following:

- Quantity
- Model
- Item Cost & Total Cost
- Taxes & Shipping

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Invoicing Requirements Continued

3) Subcontractor Invoice

Any subcontractor or third-party invoices submitted for reimbursement must contain the following:

- Itemized list of what was done: planning, design, in-direct labor
- Total Cost breakdown
- Paid for by Applicant

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Invoicing Requirements (Continued)

Proof of Incurred Other Costs Shall Include:

- Itemized listing of other direct costs and amounts billed
- Amounts billed supported by vendor invoices, receipts or other relevant third-party documentation
- Proof of Payment needed for purchases above \$5,000.

Proof of Burden Rates (Fringe benefit) Shall Include ONE of The Following:

- Rates supported by methodology and documentation in which rates are derived and applied
 - Include a Trial Balance or letter from Federal or State Agency with the fringe rate approved.

Total Benefit Cost Pool
Total Labor Costs (Salaries & Wages)

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Submitting Proper Documentation for Reimbursement



The Final Payment Form must be completed by the awardee when submitting for payment reimbursement.



Failure to complete the form properly or within a timely manner may result in non-payment. Final Payment Request Form and supporting documentation must be submitted within **270 calendar days** from Notice of Award.

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Timeline for Final Payment

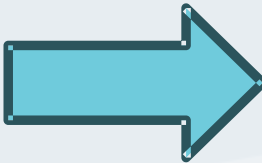
Payment Request Timeline

August 20, 2024

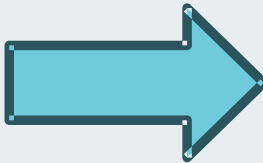
270 Calendar Days

May 17, 2025

Notice of Final Award



Sign Incentive Recipient Agreement



Submit Final Payment Request





Acronyms

Table of Acronyms

Acronym	Description
IPC	Incentive Processing Center
EVITP	Electric Vehicle Infrastructure Training Program
DIR	California Department of Industrial Relations
IRA	Incentive Recipient Agreement

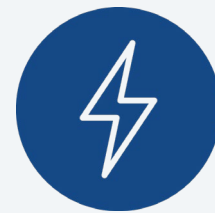
Important Dates

Item	Date
Incurred Costs Date	9/28/2023
Last Day to Submit for Reimbursement	5/17/2025

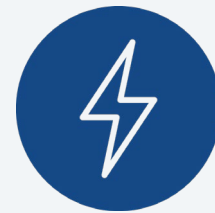
Best Practices for Participation



Contact the Project Team: [Stay Connected with Communities in Charge.](#)



All scans or photos of supporting documents must be legible and include all pages and sections, unless otherwise specified.



All invoices must include invoice date and **itemization of eligible costs, credits, discounts, and incentives received, as applicable.** They must also be accompanied by proof of payment.

Q&A Guidelines and Instructions

Ways to comment or ask questions:

1. Use the raise hand function in Zoom

Zoom Phone Controls:

- *6 – Toggle mute/unmute
- *9 – Raise hand

Please state your name and affiliation. Keep questions under 3 minutes to allow time for others.



COMMUNITIES
IN CHARGE

Thank You!

communitiesincharge@calstart.org

