

Implementation Manual for Golden State Priority Project

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A. INTRODUCTION AND OVERVIEW

In March 2012, Governor Edmund G. Brown Jr issued Executive Order B-16-2012 to help accelerate the market for zero-emission vehicles (ZEVs) in California and set a long-term goal of reaching 1.5 million zero emission vehicles on California's roadways by 2025. The executive order established milestones for three periods:

- By 2015, California's major metropolitan areas will be able to accommodate zero emission vehicles through infrastructure plans.
- By 2020, California's zero-emission vehicle infrastructure will be able to support up to 1 million vehicles.
- By 2025, 1.5 million zero emission vehicles will be on California's roadways with easy access to infrastructure.

In 2018, Governor Brown issued Executive Order B-48-18 directing all state entities to work with the private sector and all appropriate levels of government to reach a goal of 5 million ZEVs on California roads by 2030.

These milestones require mechanisms to install electric vehicle (EV) charging infrastructure quickly and effectively.

In 2021, the California Energy Commission (Energy Commission) approved a block grant recipient, the Center for Sustainable Energy (CSE), to design and implement electric vehicle charger incentive projects throughout California. The Golden State Priority Project (Project) is the first incentive project launching under the California Electric Vehicle Infrastructure Project's (CALeVIP) second block grant.

The goal of this project is to quickly and efficiently deploy incentives for the installation of EV chargers within California to help meet the State's zero-emission vehicle goals.

The Project provides incentives to qualified sites for the purchase and installation of eligible EV charging infrastructure equipment. The Project benefits the citizens of California by providing air pollution emission reductions through the provision of adequate infrastructure in Alameda County to support plug-in electric vehicle growth through 2025. CSE implements the Project through a partnership with the Energy Commission.

The Project Requirements identify criteria for applicant and site eligibility. The Project Implementation Manual provides necessary definitions, explanations and processes associated with those minimum requirements. The Implementation Manual may be periodically updated as needed to clarify Project requirements and improve Project effectiveness. The Implementation Manual, including any updates, will be posted on the Project webpage at calevip.org/incentive-project/golden-state-priority-project.

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.

This document constitutes the Implementation Manual for the Project. Definitions of key Project parameters can be found in Section D of this manual.

1. Project Overview

The Golden State Priority Project (GSPP) provides financial incentives for the installation of new DC fast charger (DCFC) installations capable of at least 150 kW guaranteed power output in the eastern and central regions of California.

Eligible counties for the GSPP are identified in Table 1.

Table 1: Eligible GSPP Counties by Region

Central Region	Eastern Region
Alameda County	Alpine County
Contra Costa County	Amador County
Marin County	Calaveras County
Monterey County	Fresno County
San Benito County	Imperial County
San Francisco County	Inyo County
San Luis Obispo County	Kern County
San Mateo County	Kings County
Santa Barbara County	Madera County
Santa Clara County	Mariposa County
Santa Cruz County	Merced County
Ventura County	Mono County
	Riverside County
	San Bernardino County
	San Joaquin County
	Stanislaus County
	Tulare County
	Tuolumne County

Funding for the GSPP is only available for sites located in disadvantaged community (DAC) or low-income community (LIC) census tracts. For the purposes of the Project, installation address must be in a DAC or LIC census tract as defined by the California Climate Investments [Priority Populations Map](#).

The Project allows sites to apply for incentives for DCFC applications only. Eligible incentive amounts are included in Section B of this Implementation Manual.

Table 2: Project Funding Allocations

Funding Region	Total
Central Region	\$20,000,000
Eastern Region	\$10,000,000

Potential applicants can determine their eligibility and reserve available incentive funds online at the Project website, <https://calevip.org/incentive-project/golden-state-priority-project>. Individuals without computer or internet access can begin the application process by contacting CSE at 510-519-8123.

Once submitted, all applications will be assigned a prioritization tier based upon the readiness of the submitted application, and then assigned in a processing queue based upon which tier was met. Rebate funding will be reserved in queue order, for all Eligible Applications, or until all the funding allocated for the Application Window is reserved, whichever occurs first.

Once the application is processed and funds are reserved, applicants have 450 days (15 months) to complete their equipment installation and provide all supporting documentation. Once all documents required to receive incentives are reviewed and approved, incentives are issued within 15 business days of application approval. All final rebate amounts are determined by the total eligible project costs.

Information about the Project is available to the public and other interested parties via the Project website. CSE maintains and operates the Project website, <https://calevip.org/incentive-project/golden-state-priority-project>, which includes an up-to-date list of eligible equipment models and network providers, online incentive applications, all supporting Project documentation and forms. The purpose of the website is to provide an easy, user-friendly experience while providing Project transparency.

Key milestones for the Project development and implementation are identified in Table 3.

Table 3: Project Development and Implementation Timeline

Action Item	Time Period
Project Launch. Application Window Opens	January 24, 2023
Application Window Closes	March 10, 2023
Notification of Tier Status	March 21, 2023
Funding Status Notification (Successful Applicants)	By May 22, 2023
Funding Status Notification (Unsuccessful Applicants)	By May 24, 2023

B. EQUIPMENT ELIGIBILITY

1. Equipment Categories

This section discusses the categories of charging equipment eligible for incentive funding through the Project and the specific criteria equipment must meet to attain eligibility. An updated list of eligible equipment and incentive amounts are maintained on the [CALeVIP](#) website.

DCFC are the only equipment eligible for grant funding under the Project. To be an eligible DCFC, each charger must use Combined Charging System (CCS) connectors and/or CCS adapters that are fully integrated into the charger such that they cannot be removed from the site. Chargers must be capable of charging at 150kW or greater to be eligible, as determined by the DCFC rebate categories below:

- A DCFC connector must be capable of delivering at least 150 kW-274.99 kW when all active connectors are in use to be eligible for the \$55,000 per active connector rebate cap.
- A DCFC connector must be capable of delivering at least 275 kW when all active connectors are in use to be eligible for the \$100,000 per active connector rebate cap.

2. Equipment Eligibility Criteria

All eligible installations must install eligible equipment, be new to the eligible site, exist on the eligible site but charging equipment has not been present (stub-out), or eligible equipment will be replacing existing DCFC with power output of below 40kW. Equipment must meet the following criteria to attain incentive eligibility:

a. New equipment

- Must be new equipment installed for the first time. Units resold, rebuilt, rented, received from warranty insurance claims, or with new parts installed are not eligible for incentives. Equipment obtained as a gift or a prize is not eligible for incentives.

b. CCS Connectors

- Equipment must have CCS Connectors to be eligible for rebate. Tesla and CHAdeMO connectors may be installed but will not be considered when determining the maximum rebate amount for the installation.

c. Networked

- Equipment must be networked, which is defined as a charger connected to a backend network operations center, which at a minimum enables remote diagnostics, remote start, and usage data collection. Minimum five-year networking agreement required (eligible towards total project cost).

d. Power level requirement

- All eligible equipment models must be capable of delivering electricity of at least a 150-kW guaranteed power output at each active connector, when requested by a vehicle.
 - Guaranteed output is defined as: the maximum power that can be provided per active connector when all active connectors are in use.
 - Active connector is defined as: the number of DCFC connectors that can supply the rebated guaranteed output at any one time.

e. Open Charge Point Protocol (OCPP)

- Eligible equipment must use an implementation of the Open Charge Point Protocol (“OCPP”) version 1.6 or later for purposes of network interoperability.

f. Payment requirements

- The equipment cannot require a subscription or membership to dispense energy. If payment is required, the following payment options must be physically located on the charger, or on a kiosk serving the charger:
 - An EMV chip reader
 - A mobile payment device
 - A toll-free number

g. Be approved by a Nationally Recognized Testing Laboratory (NRTL) for EVSE testing and certification.

- Equipment must be approved by a NRTL that is accredited to certify EVSE standards. Underwriter’s Laboratory (UL), Intertek (ETL) and MET Laboratories, Inc. are all currently accredited NRTLs. A complete list of NRTLs can be found at <https://www.osha.gov/dts/otpc/nrtl/nrtllist.html>.

h. Registered on the CALeVIP 2.0 Equipment Eligibility Dashboard as eligible for the Project

3. Eligible Project Costs

The following related project costs can be included in total project costs as part of the same charger project installation. Any costs incurred at a different project site are ineligible. All costs can be incurred starting September 1, 2022 but are incurred at applicant's own risk prior to the funds reserved date (e.g., application may be determined ineligible, or funds may be unavailable at time of application).

a. Equipment including EVSE, transformer, and panels

b. Installation costs (labor and materials)

- Installation costs may include, but are not limited to:
 - Contractor labor and materials for connecting the charger(s) to the electrical service.
 - Utility service order, if applicable for the installation site.
 - Planning and engineering design costs such as development of drawings and plans meeting the Americans with Disabilities Act requirements for charger(s).
 - Necessary project signage.

c. Electric infrastructure related to EV charging upgrades

- Site electrical infrastructure upgrades are often required to serve new EV charging load. Eligible costs may include necessary site transformer upgrades servicing EV chargers and electric panel upgrades and necessary stub-outs.

d. Advanced Energy storage equipment

- Energy Storage (ES) equipment is typically comprised of an inverter and battery pairing operated by an energy management and control system to charge and discharge as needed. Generally, ES is installed as a peak load shaving strategy and can be particularly effective in reducing instantaneous demand from the grid while chargers are in operation.

e. Network service agreements

- The cost of an agreement with a network provider is an eligible cost. Extended warranty agreements covering service and parts for protective and corrective maintenance and repairs are eligible costs.

f. All-inclusive Solar EV Charging Systems

- The cost of a dedicated EV charging system in which solar panels are an integral part of the system is an eligible cost.

g. Demand management equipment

4. Ineligible Project Costs

Ineligible project costs may include, but are not limited to, permits required by the local authority having jurisdiction (AHJ), standalone solar panels, any project costs offset by other incentive programs or projects, or any costs incurred prior to September 1, 2022.

5. Development of List of Eligible Equipment Models

For equipment incentive eligibility, the equipment manufacturer must register on the CALeVIP website and submit equipment information to CSE. Manufacturers can use the [Manufacturer Login button](#) on the CALeVIP website to create an account for the company and submit the equipment for verification. The equipment manufacturer must submit equipment information for each product that they would like to make eligible. CSE works with the equipment manufacturer to ensure that all the required information is received and request any additional information needed to make an eligibility determination.

If the equipment meets the eligibility requirements set forth in Section B (2) of this Implementation Manual, then CSE adds the Equipment to the List of Eligible Equipment Models to the dashboard online. Once equipment is submitted to be verified, CSE will review provided documentation and inform the company whether the equipment is eligible for current CALeVIP rebates. Only equipment submitted by equipment manufacturers will be listed on the website.

All verified equipment will be displayed on the [CALeVIP 2.0 Equipment Eligibility Dashboard](#).

6. Eligible Site Types

Eligible sites must comply with the following requirements:

- a. Installation Address is located within one of the following funding regions:

Table 4: Eligible GSPP Counties by Region

Central Region	Eastern Region
Alameda County	Alpine County
Contra Costa County	Amador County
Marin County	Calaveras County
Monterey County	Fresno County
San Benito County	Imperial County
San Francisco County	Inyo County
San Luis Obispo County	Kern County
San Mateo County	Kings County

Santa Barbara County	Madera County
Santa Clara County	Mariposa County
Santa Cruz County	Merced County
Ventura County	Mono County
	Riverside County
	San Bernardino County
	San Joaquin County
	Stanislaus County
	Tulare County
	Tuolumne County

b. Within Disadvantaged or Low-Income Communities

Installation Address is located in a Disadvantaged Community (“DAC”) or Low-Income Community (“LIC”) census tract, as defined by the California Climate Investments [Priority Populations Map](#) (as updated May 2022). The Low-Income Households category is not eligible for funding through the Golden State Priority Project.

c. Ensure safety and security

Be well-lit, secure and in compliance with all federal, state and municipal laws, ordinances, rules, codes, standards and regulations.

d. Be Publicly Accessible

- Site does not have any time restrictions for availability to the public or located behind a fence or in a gated parking lot closed to the public after hours.
- Site is publicly available 24 hours per day, 365 days a year.
- Sites in standalone City/county/privately owned parking lots or garages that are exempted from the general availability requirements, instead must have the chargers accessible to the public at least 18 hours a day, seven days a week, excluding holidays.

e. Be one of the following site types:

1. Airport: Parking facilities at airports that serve the public are eligible primary sites. Long-term parking uses are not allowed.
2. Business district: An area within a community that has a high concentration of businesses and average dwell times of 30 minutes or less. The site must have a direct line of sight to the major road. This is typically the central area or commercial center of a town or city, though many business districts may be present within a single town or city. Dealerships, office buildings, and warehouses are not eligible under this site type.

3. Casino: A building where gambling games of chance against the house/casino are played. Standalone poker rooms or card halls are ineligible.
4. City/county/private-owned parking lot or garage: A parking building or lot (i.e., parking is the primary use) that provides parking spaces to the public and is accessible at least 18 hours a day, 7 days a week. Workplace locations and long-term parking uses are not eligible. Pay-to-park is eligible.
5. College/university: Must be an accredited, nonprofit two- or four-year college or university.
6. Community center: A facility owned and operated by a public agency or a non-profit community organization. The primary purpose of the facility must be for recreation, social welfare, community improvement, or public assembly.
7. Gas station: Any new or existing facility that, as its primary use, serves as a motor vehicle fueling service station retailing petroleum-based automotive fuels (e.g., gasoline, diesel, E10/E15) to the general public and has additional complementary customer store(s) or service(s) located on-site.
8. Grocery store: A store that sells food and household supplies.
9. Hospital: A facility providing medical, psychiatric or surgical services for sick or injured persons primarily on an inpatient basis, including ancillary facilities for outpatient and emergency treatment, diagnostic services and training.
10. Hotel: A hotel must meet three criteria:
 - a. Is a permanent building for the primary purpose of short-term lodging.
 - b. Provides dining, shopping or entertainment options available to the general public, OR is less than a quarter mile from another eligible site.
 - c. Is located in a rural area (population below 2,500) and within 5 miles from a major highway, OR located in an urban area or cluster (population that is 2,500 or greater).
11. Large-format retail store: Large, free-standing, generally single-floor, retail stores over 80,000 square feet.
12. Library: A place in which literary, musical, artistic or reference materials (such as books, manuscripts, recordings or films) are kept for use but not for sale.
13. Place of worship: a building used for the gathering of a religious or faith-based organization for spiritual purposes.
14. Police or Sheriff station: Storefront police or sheriff substations that serve the surrounding community and adjacent areas. Proposed Installations at Police and Sheriff stations are still subject to public accessibility requirements and should not primarily be for fleet use.
15. Public transit hub: Centers for public transit, including light rail stations, train stations and bus stations. Does not include park and ride lots.
16. Restaurant: A business where meals and refreshments may be purchased.
17. Retail shopping center: A group of retail and other commercial establishments that is planned, developed, owned and managed as a single property.

7. Rebate Amounts

Incentive amounts are based on actual eligible costs for DCFC. All final rebate amounts are determined by the total eligible project costs. The amount of rebate funding reserved for an Eligible Application will be determined based on the selected Eligible Equipment’s guaranteed output and number of active connectors, for up to 20 active connectors, as identified in the table below:

Table 5: Rebate Amounts

Guaranteed Max Output	Rebate Funding Reserved per Active Connector
150 kW – 274.99 kW	\$55,000
275 kW+	\$100,000

Table 6: Quantity of Connectors Eligible for Rebates per Site (min-max)

Minimum Active Connectors	Maximum Active Connectors
4	20

Applicants can still apply for sites exceeding the maximum quantity but may only receive incentives for the quantity outlined in the table above.

Example: An applicant will install eight (8) DC fast charger active connectors, capable of 175kW each, at a new site in San Francisco County within a DAC or LIC. The applicant is eligible for eight (8) \$55,000 incentives for a total of \$440,000 in incentives.

The applicant’s total project cost is calculated on the installation costs for eight active connectors.

a. Participation in Other Incentive Projects

Incentives from programs that are considered stackable may be used to cover EV charger installation project costs not covered by GSPP, but in no case could stacking of incentives exceed actual costs of the project. Only by meeting all project requirements will an application be eligible for CALeVIP incentives; determination of eligibility for any

stackable programs does not confer eligibility under the project. Other potential sources of funding may include, but are not limited to, the Low Carbon Fuel Standard (LCFS).

b. Rebate Disbursement

Rebates will be issued to the Applicant Organization and may only cover costs incurred by the Applicant Organization.

Rebate amounts will be for **50% of the Proposed Installation’s Total Approved Costs**, but not exceeding the rebate funding reserved for the Application. Disbursements will occur after the completion of the Proposed Installation and after CSE approves the corresponding Application for payment.

Applicant Organizations will have the option of receiving rebate funds through a check sent by mail or through an electronic funds transfer to an account under the Applicant Organization’s name.

Checks must be cashed within six (6) months of the date on the check. Checks not cashed within this timeframe will be cancelled.

8. Maximum Rebate per Entity

There is no limit to the total amount of incentives an organization can receive if funding is available. However, each site is only eligible for a maximum rebate of 20 active connectors.

9. Installation Requirements

An Installation must be completed in accordance with the following requirements to be eligible for disbursement of reserved rebate funds:

- a. An Authorized Representative must obtain any required permits and comply with all applicable federal, state, and municipal laws, rules, codes, and regulations for work performed to complete the Proposed Installation.
- b. The Proposed Installation and all work performed to complete the Proposed Installation must be carried out by a qualified and licensed contractor in accordance with all local, state, and federal codes, permitting, and inspection requirements.
- c. All electric vehicle charging infrastructure and equipment located on the customer side of the electrical meter shall be installed by a contractor with the appropriate license classification, as determined by the Contractors’ State License Board, and at least one electrician on each crew, at any given time, who holds an EVITP certification. Any Proposed Installation to install a charging port supplying 25 kilowatts or more to a vehicle must have at least 25 percent of the total electricians working on the crew for

the project, at any given time, who hold EVITP certification.

- d. All persons working to complete the Proposed Installation must be paid prevailing wage in compliance with California Prevailing Wage law.
- e. All contractors shall comply with California Prevailing Wage law and pay prevailing wages accordingly.
- f. A signed EVITP Requirements Affidavit that adheres to the requirements in Section IV (Post-Application Process) must be submitted

C. APPLICANT DUTIES AND REQUIREMENTS

1. Applicant Requirements

The applicant is responsible for submitting the incentive application and providing all required documentation to CSE. The Applicant Organization (Rebate Recipient) must accept the incentive directly – the Project does not provide an option to assign the incentive to an equipment seller (i.e. equipment manufacturer).

The Energy Commission 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.

For a person to be eligible to submit an Application and thus considered an Applicant, they must meet the following requirements:

1. Be an Authorized Representative of a commercial or public facility installation site. An authorized representative is defined as the owner of the site (“Site Owner”) where the charging installation being incented will be installed (“Proposed Installation”) or an individual that has received permission from the Site Owner, via the [CALeVIP Site Verification Form](#), to apply on behalf of the Site Owner for the Proposed Installation.
2. Represent any of the following:
 - A Business that is based in California or has a California-based affiliate
 - A Sole Proprietorship that is based in California or has a California-based affiliate
 - A Non-Profit Organization that is based in California or has a California-based affiliate
 - A government entity that is based in California or has a California-based affiliate
 - A California Native American Tribe listed with the Native American Heritage Commission at the time of application

3. Completion of the Proposed Installation must adhere to the Installation Requirements
4. Submit a complete Installation Progress Questionnaire response at 120 calendar days, 210 calendar days, 300 calendar days, and 390 calendar days from the Funds Reserved date. Applicant Organizations will have a grace period of up to 14 calendar days to complete responses to each Installation Progress Questionnaire.
5. Complete an Installation Data Form online within 450 calendar days from the Funds Reserved date
6. Submit Supporting Documentation within 450 calendar days from the Funds Reserved date. Supporting Documentation must be scanned and submitted through the CALeVIP 2.0 website. Supporting Documentation must include the following that adhere to the Quality Submittal Standards:
 - a. A signed Electric Vehicle Infrastructure Training Program (EVITP) Requirements Affidavit
 - i. EVITP Requirements Affidavit must include:
 1. Project description matching that of the application
 2. Verifiable EVITP certification number
 - b. Completed Invoice Form
 - i. Invoice Form must include:
 1. Matching invoice date and invoice number for each corresponding invoice
 2. Unit Cost, Quantity, and Tax Designation for each invoice line item
 - c. Copy of paid design/engineering invoice(s), if costs are being submitted for review
 - i. Invoice must include:
 1. Contractor/engineer name, contractor/engineer license number, business address, phone number, itemized costs, and payment terms (paid in full – cash, check, credit card, etc.).
 2. Date of payment
 - d. Copy of paid equipment receipt/invoice, if costs are being submitted for review
 - i. Receipt/Invoice must include:
 1. At a minimum: purchase date, retailer name, business address, phone number, equipment make and model number(s), equipment serial number(s), and payment terms (paid in full – cash, check, credit card, etc.)
 2. Equipment order quantity is at minimum equal to the quantity applied for within the application
 - e. Copy of paid installation receipt/invoice(s), if costs are being submitted for review
 - i. Receipt/Invoice must include:
 1. Contractor name, contractor license number, business address, phone number, itemized costs, and payment terms (paid in full – cash, check, credit card, etc.)

2. Date of payment
3. Description of installation work
- f. A signed Network Agreement Acknowledgement form and a copy of the executed network service agreement or contract
- g. Copy of final inspection card, including inspector sign-off
- h. At least 2 photographs of installed and operational charger(s) at the Installation Address
 - i. Photographs must include:
 1. Clear, legible photographs of installed and operational equipment
 2. Have CALeVIP labeling visible in each photo
7. Submit station information to the Alternative Fuels Data Center station locator tool for all charging stations incentivized through the Project.
8. Receipt of initial charger session data by CSE demonstrating that the Proposed Installation is an operational site. Generally, CSE will work to obtain this information from the selected Eligible Network Provider. However, if the selected Eligible Network Provider is not cooperating, CSE may request the Applicant Organization to submit this initial chargers session data as well as subsequent charger session data. See Section on Operational Requirements for more details.
9. Ensure the charger(s) shall remain in service, in compliance with the Operational Requirements, and at the project site address, for a minimum of 5 years.
10. Complete and submit the Project Installation Data form.
11. Maintain a 5-year network service agreement immediately after the equipment installation.
12. Be available for follow-up inspection if requested by CSE or Energy Commission; or either entities designated contractor or representative.
13. Energy Commission reserves the right to request voluntary participation from incentive recipients in ongoing research efforts that support the goals of CALeVIP.
14. Through submission of an application to the Project, agree to allow the California Energy Commission to utilize your application data for publicly available data tools, included, but not limited to, the Energy Commission's Cost Transparency Tool.
15. The applicant is responsible for ensuring the accuracy of the information on all incentive applications and required documentation submitted to CSE. 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.

2. Research Participation

CSE reserves the right to request participation from incentive recipients in ongoing research efforts that support the CALeVIP and Project research goals. CSE shall distribute surveys to incentive recipients or use other research methods (e.g. focus groups, etc.) to collect data and other information pertaining to eligible equipment ownership. CSE will identify research parameters and determine the most effective mechanism for obtaining information.

3. Application Process

Applications are only accepted during an open application window, which provides Applicants the opportunity to thoroughly review Application information prior to submission. All Application information and Application documents submitted during the applicable application window, will be deemed as final and corrections to this information will not be permitted.

Once the application period opens, navigate to Project webpage at <https://calevip.org/incentive-project/golden-state-priority-project> to access the application process information and start the application online.

4. Reservation of Rebate Funds

a. Application Processing Tiers

After the close of the application period, submitted Applications will be assigned a prioritization tier (“Tier”) based on the documents submitted for the Permit/Utility Service Application Package document slot.

1. Applications providing both (1) An issued permit for the Proposed Installation and (2) A final utility service design for the Proposed Installation or an official letter stating that no new or upgraded service is necessary for the Proposed Installation, through the Permit/Utility Slot will be placed in the highest Tier (“Ready to Build”) and then randomly assigned a place in the queue.
2. Applicants providing only one of (1) An issued permit for the Proposed Installation or (2) A final utility service design for the Proposed Installation or official letter stating that no new or upgraded service is necessary for the Proposed Installation, through the Permit/Utility Slot will be placed in the second-highest Tier (“Design Approved”) and then randomly assigned a place in the queue after all Ready to Build Applications.
3. Applications that adhere to the Application Requirements and are not Ready to Build or Design Approved will be placed in the lowest Tier (“Design in Progress”) and then randomly assigned a place in the queue after all Ready to Build Applications and Design Approved Applications.

Rebate funding will be reserved in queue order, for all Eligible Applications, or until all the funding allocated for the Application Window is reserved, whichever occurs first. The date that an Application is awarded Funds Reserved status is the Funds Reserved date.

For any Installation Addresses receiving more than one (1) Application, a single Application will be randomly selected prior to a Tier being assigned. Only the single Application that is randomly selected will be assigned a Tier and assigned a place in the queue.

Applicants will be notified of their tier within seven (7) business days after the application window closes. Successful applicants will be notified no later than May 22nd of their funds reserved status. Unsuccessful applicants will be notified no later than May 24th that their application was not reserved.

b. Submittal of Required Documents

After an application is accepted by CSE and deemed qualified for rebate funds, any additional required supporting documentation (outlined in Section C.4) must be submitted to CSE within the required timeframes (outlined in Section C.3 and C.4) into the Construction Progress Tracker (defined in Section C.5).

Applicants must upload and submit required Copy of Permit or, if upgraded or new utility service is required for the project, Final Utility Service Design documents, and Receipt of Equipment Purchase within 60 calendar days of the Funds Reserved date.

If documents are not submitted within 60 calendar days of the Funds Reserved date, the application will be cancelled, and the funds released back into the Project.

c. Installation Timeline and Extensions

Applicants have a total of **450 calendar days** (15 months) from the Funds Reserved date to complete installation and submit all required documents online. *Applicants without internet access may mail supporting documentation to CSE. If mailed, submittal date is determined by U.S. mail postmark.*

If a project is expected to exceed this time, an Extension must be requested and approved via the online Extension Request Form. All application extension requests must be made and reviewed according to the [Extension Policy](#) that is effective on the date the request is made.

d. Final Installation and Payment

Once all required documents are submitted CSE performs a review and if complete application is approved; applicant can expect final incentive check to be mailed within 15 business days of application approval.

Rebate checks must be cashed within six months of the date on the check. Checks not cashed within this timeframe will be cancelled and the funds returned to the Project.

5. Required Documentation

For an Application to be awarded a reservation of rebate funding (“Funds Reserved status”), an Applicant must complete and submit an Eligible Application through the CALeVIP 2.0 Application Portal. To be considered an Eligible Application, an Application must include the following:

- a. A complete Application including, but not limited to:
 - Applicant Organization’s name, as registered in the State of California
 - Applicant Organization’s address, as registered in the State of California
 - Applicant Organization’s mailing address
 - Applicant Organization’s Tax ID Number
 - Full name and contact phone number of the primary person responsible for managing the Application on behalf of the Applicant Organization
 - The address of a site identified as eligible for the Project, and where the Proposed Installation will be installed
 - Selection of charging equipment identified as eligible for the Project, for a total of at least four (4) active connectors.
 - Selection of a network provider identified as eligible for the Project
- b. A completed Site Verification Form (“SVF”) providing confirmation that the Applicant Organization is the Site Owner OR that the Site Owner authorizes the Applicant Organization to install the charging equipment at the site.
- c. A complete Permit Application Package or Utility Service Design Package that adheres to the Quality Submittal Standards.
 - A complete copy of Evidence of Permit submittal includes the following:
 - A copy of the permit application, or a copy of an issued permit, for the Proposed Installation
 - Copy of permit plan set submitted, showing all civil and electrical work that the permit is being applied for
 - Copy of payment receipt for submittal of building/electrical/construction permit or communication from the permitting agency showing no fees due for the permit application.
 - A complete copy of Evidence of Utility Service Design submittal includes the following:
 - A copy of the new/upgraded service application, or a copy of the final design, or an official letter stating that no new or upgraded service is necessary for the Proposed Installation

- A copy of any plan sets or electrical calculations submitted with the application
 - If submitting a plan set, it must, at minimum, include a single-line diagram of electrical work that the new/upgraded service is being requested for
 - If submitting electrical calculations, they must, at minimum, include the EV charging capacity that the new/upgraded service is being requested for
- If a copy of the new/upgraded service application was submitted, EITHER:
 - An invoice or receipt showing paid engineering advance
 - Communication from the utility showing no fees due for the new/upgraded service application.
- Applicants have sixty (60) calendar days from the Funds Reserved date to submit copy of an issued Permit, copy of the final Utility Service Design, and proof of equipment order. If documents are not submitted within sixty (60) calendar days, the application will be cancelled.

6. Construction Progress Tracker

Application Managers are required to sign up for the Construction Progress Tracker (“CPT”) by creating an account in Teamwork and accepting the invitation for each Eligible Application that has rebate funding reserved within five (5) calendar days of emailed invitation.

Application Managers are required to update, on the Applicant Organization’s behalf, construction tasks and milestones in the tool once completed in the field.

- If responses to CPT notifications or surveys are not received within 14 calendar days of each CPT notification or survey being received, applications are at risk of losing their Funds Reserved status and being cancelled, or of having extension requests denied.

7. Installation and Operation Provision

Applicants participating in the Project are required to keep the equipment operational and meet all applicable Project requirements for a minimum of five years for DCFC equipment.

8. Operational Requirements

The Applicant Organization is required that each charger in a Proposed Installation is “up” at **least 97%** of a site’s standard hours of operation and that the chargers shall remain in service at the Installation Address for a minimum of sixty (60) months.

The Proposed Installation is “up” when its hardware and software are both online and available for use, or in use, and the charging connector successfully dispenses electricity as expected. The Proposed Installation’s Uptime will be calculated by CSE, as follows, on an annual basis:

- **Uptime** = ((Total Standard Hours of Operation – Downtime + Excluded Downtime) / (Total Standard Hours of Operation)) * 100%
- **Downtime** is defined as any 15-minute interval within the standard hours of operation in which a charger is not operational.

Excluded downtime is defined as a period of downtime, within the standard hours of operation, caused by any of the following:

- Electric Grid Power Loss: Power supplied by the electric utility for a site is not supplied at levels required to for minimum function of the Proposed Installation. This may include, but is not limited to, service outages due to utility equipment malfunction or public safety power shut-offs.
- Accident, Vandalism or Theft: Physical damage to the Proposed Installation for events such as vehicle collision with a charger, theft of charging cables, damage to connectors from mishandling, and damage to screens. Excluded downtime is limited to a maximum of 5 days for each event.
- Telecommunication Network Outages: Loss of communication between a charger and a central system due to cellular or internet service provider system outages that are beyond the control of the Applicant Organization. Downtimes caused by cellular communication chips that are no longer compatible with existing cellular networks do not count as excluded downtime.
- Planned Outage for Maintenance or Upgrade: Any planned maintenance.
- Extraordinary Events: Unforeseeable events that would have been impossible to plan for using commercially reasonable methods.

A change in ownership of the Proposed Installation site does not relieve the Applicant Organization from the Uptime requirements described above.

9. CALeVIP Labeling

Applicants are required to add Project-provided CALeVIP labeling on a visible location of any chargers that have received a rebate through the Project.

10. Usage/Session Data Required

Applicants are required to Grant CSE and the CEC direct access to EV charger utilization data (for up to 5 years) through the Applicant’s selected Eligible Network Provider. If the Applicant’s

selected Eligible Network Provider does not provide the Required Data to CALeVIP on an annual basis, the Applicant Organization will be responsible for providing the Required Data within 90 days of being notified by CALeVIP, and then thereafter on an annual basis. A change in ownership of the Proposed Installation site does not relieve the Applicant Organization from the charging session data requirements described above

a. Network Provider Requirements

All network providers must meet the following requirements to be considered an Eligible Network Provider:

- Provide networking services for EV charging stations
- Have a signed data-sharing agreement in place with CSE
- Implement a mechanism to transfer the required data to CSE with a format and frequency that is acceptable to CSE and the California Energy Commission
- Be capable of obtaining the required data identified in the signed data-sharing agreement
- Provide the Required Data on at least an annual basis

If a Proposed Installation fails to contract with an Eligible Network Provider for networking services, the corresponding Application will not be granted Funds Reserved status and will be cancelled.

D. DEFINITIONS

Active Connector: The number of DCFC connectors that can concurrently supply the rebated power level at any one time.

Application Date: The date an applicant successfully submits an application.

Battery Electric Vehicle (BEV): A vehicle that runs 100 percent on electricity stored in rechargeable batteries and has an electric motor rather than a gasoline engine.

CHAdeMO: A Japanese-developed standard for EV DCFC.

Charger: Charging equipment (external to the vehicle) used to charge a plug-in electric vehicle.

Combined Charging Standard (CCS): A multi-national developed standard for EV DCFC.

Connector: The plug delivering power between the charger and the on-board vehicle charging equipment.

Disadvantaged Communities (DACs): DAC census tract, as defined by the California Climate Investments [Priority Populations Map](#)

DC Fast Charger (DCFC): A charger that provides direct current to support charging at higher rates with inputs of 480+ volts and output power ranges of 150 kW and above. They must have at least four CCS active connectors that can serve a vehicle at or above the minimum rebated power capacity without any operational limitations.

Electric Vehicle Service Provider (EVSP): A business that can provide connectivity across a network of chargers. Connecting a central server, the provider manages the software, database, and communication interface that enables operation of the station. Some EVSPs also provide charger installation and contracting services.

Energy Storage (ES): A battery that uses a smart energy management system to charge and discharge as needed. Generally, ES is installed as a peak load shaving strategy and can be particularly effective in reducing energy consumption from the grid while L2 or DCFC equipment is in operation. ES equipment is an eligible cost towards the project cost but is not required and does not increase the incentive amount.

Electric Vehicle Infrastructure Training Program (EVITP): The Electric Vehicle Infrastructure Training Program (EVITP) provides training and certification for electricians installing electric vehicle supply equipment (EVSE).

Funds Reserved Date: The date funds are reserved for a CALeVIP application.

Guaranteed Max Output: The maximum power that can be provided per active connector when all active connectors are in use.

Light-duty Fleet: Groups of motor vehicles owned or leased by a business, government agency or other organization rather than by an individual or family. Chargers may be public or private and must be shared use. Chargers must primarily serve light-duty vehicles but can serve medium and heavy-duty vehicles as a secondary use. Primary use of chargers cannot be for medium or heavy-duty vehicles.

Light-duty Vehicle: A vehicle with a Gross Vehicle Weight Rating of 10,000 pounds or less.

Low-income Community (LIC): LIC census tract, as defined by the California Climate Investments [Priority Populations Map](#)

Major Highway: An Interstate highway, US Federal highway, or California State highway.

Medium- and Heavy-Duty Vehicles: Vehicles with a Gross Vehicle Weight Rating of over 10,000 pounds.

Nationally Recognized Testing Laboratory (NRTL): An independent laboratory recognized by the Occupational Safety and Health Administration to test products to applicable product safety standards.

New Site: No electrical infrastructure is in place. Conduit installation is acceptable.

Plug-in Electric Vehicle (PEV): A vehicle that can be plugged into an electrical outlet or charging device to recharge its battery. There are two types of plug-in electric vehicles: battery electric vehicles and plug-in hybrid electric vehicles.

Replacement/Make-ready: Existing site wired with all the electrical infrastructure needed to support the installation of EV charging.

- For DCFC: replacements are allowed only for units capable of delivering less than 40 kW

Site: Developed real property substantially under the common control of a single entity serving residents/employees/customers/guests for a common purpose.

Stub-out: Includes at least 2-inch minimum spare conduit run with pull rope that is sized, installed and located per the National Electrical Code for future installation of wiring supporting up to a 480-volt AC, 4-wire, 125-kilowatt (kW) load.

Uptime: when charger hardware and software are both online and available for use, or in use, and the charging connector successfully dispenses electricity as expected. As defined by: $((\text{Total Standard Hours of Operation} - \text{Downtime} + \text{Excluded Downtime}) / (\text{Total Standard Hours of Operation})) * 100\%$

Vehicle-to-grid (V2G): A system in which plug-in electric vehicles communicate with the power grid to sell demand response services by either returning electricity to the grid or by throttling their charging rate.

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