

Transportation Electrification SB 350 Utility PRP Report Template

Final Version May 8, 2018

Instructions: submit one report for each individual project. If a section of this template is not applicable to a project, state “N/A.” Additional instructions are provided in brackets through this template. Please delete these detailed instructions when submitting the report.

1. Executive Summary
2. Project Description and Background
 - a. Goals
 - b. Procedural history
 - c. Background research [Note: include relevant literature or previous pilots.]
 - d. Implementation timeline and milestones
3. Project participants
 - a. Description of customers and sites [Note: describe which sectors the customers and sites are in. Describe whether and how the EVSEs were limited to project participants or if they were publicly available and the relationship between the site host and the driver, including payment methods. Provide information about the site facilities, including whether there was existing TE infrastructure due to building codes or other investments. If applicable, include a map of site locations that is anonymized to the census tract level and can be shared publicly.]
 - b. Barriers to participation [Note: Provide the number of participants that applied for the project, and give a numerical breakdown of the reason they were unable to participate (e.g., 10 percent of customers could not participate because site does not meet project requirements). Describe any barriers that prevented otherwise interested applicants from participating.]
 - c. Disadvantaged community participation [Note: explain DAC participation, including how utilities selected sites, if any sites are adjacent to DACs, if there are benefits to DACs even if a project site or charging infrastructure is not in a DAC. Describe challenges and barriers to DAC participation across the different sectors of the program, as well as which sectors and outreach efforts were most successful.]
 - d. Diverse customer outreach and engagement [Note: explain methods utility used to encourage participation by small, locally-owned, minority-owned, and women-owned businesses, and results.]
 - e. Project partners
4. Costs
 - a. Actual and forecast utility direct costs [Note: explain any significant deviations from forecast costs, identify any impacts of unexpected costs on project outcomes. Identify the major cost drivers on the utility side and customer side of the infrastructure.]
 - b. Utility expenditures in disadvantaged communities [Note: provide expenditures programwide as well as for specific sectors where applicable.]

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- c. Customer costs [Note: identify the upfront and ongoing costs to participating customers of participating in the project. Include any assessments of the total cost of ownership of owning and operating an electric fleet.]
 - d. Leveraged funding [Note: include non-utility funding that supported the infrastructure installation as well as any vehicle purchases by program participants.]
5. Equipment and Competitive Markets
 - a. Equipment procurement or qualification process [Note: describe the utility's procurement process, including any RFP or RFQ requirements, any communications or connector standards or requirements for equipment, how many and which vendors and/or models were qualified for the project, power level of charging equipment (kW), AC vs DC charging, and supplier diversity efforts.]
 - b. Equipment installation [Note: explain whether utility personnel or subcontractors were responsible for installation and any commissioning. Describe any supplier diversity requirements, workforce development efforts, or targeted hiring efforts in disadvantaged communities. For all of the installations, summarize how many of each equipment model were installed, the EVSE configuration (wall-mounted, pedestal, etc.), and for DCFC how many of each connector type (CCS, CHAdeMO).]
 - c. Risks of stranded assets [Note: identify any concerns that arose throughout the process regarding the expected useful life of any utility- or customer-owned assets and anything the utility did or recommends doing to address those risks.]
6. Load Management and Grid Integration
 - a. Demand at project sites [Note: identify the maximum monthly demand due to new EV load, and if applicable, total at site including non-EV load. Describe the general load shapes as reported in the data collection template. If charging session data is available both at the utility meter level and directly from the EV service providers, explain both sources of data and note any discrepancies.]
 - b. Description of load management and/or grid integration requirements
 - c. Customer outreach strategies used to incentivize managed charging
 - i. Effectiveness of outreach
 - ii. Communication methods for sending pricing signals to customers
 - d. Responsiveness of customers to load management requirements or pricing [Note: compare the load profiles with the hourly rates to show how price and load are correlated. Provide any explanation for why customers did not respond to load management requirements or price signals.]
 - e. Demand response participation
 - i. Summary of demand response requirements
 - ii. Customer participation rates
 - iii. Load impacts of participation
7. Outreach and Education
 - a. Description of customer outreach and education activities
 - b. Customer surveys and metrics

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- i. Description and sample of customer surveys
 - ii. Customer satisfaction with project
 - iii. Customer-reported incremental vehicle adoption due to project [Note: provide the number of customers that report they would not have otherwise adopted an EV without the project.]
 - iv. Effectiveness of customer outreach methods [Note: describe whether the utility used any specific outreach methods in disadvantaged communities or any that were particularly effective in those communities.]
8. Safety
 - a. Summary of relevant safety requirements
 - b. Safety issues reported during project and actions taken to correct them
9. Lessons Learned
 - a. Summary Table [Note: describe each issue that arose during the project, whether and how it was resolved during the project, and any recommendations, including those from customers, vendors, project partners, of how to address in any future implementation. Include any issues related to permitting and regulatory compliance.]
 - b. Project Assessment [Note: explain whether it was successful, could be continued or scaled up, and what modifications would be necessary.]

[Note: The utilities should consult with each other, Energy Division staff, and the selected evaluator to establish consistent methodologies for the metrics included in report sections 10-12 below.]

10. Vehicle Adoption
 - a. Description of customer's vehicles before project [Note: if applicable, describe the vehicle(s) the customer used prior to enrolling in the project and the fuel use associated with the vehicle(s).]
 - b. Electric vehicles served by project [Note: include total and incremental number served.]
 - c. Petroleum reduction
11. Greenhouse Gas Emissions Reductions
 - a. Emissions reductions
 - b. Calculation methodology [Note: include assumptions on vehicle adoption.]
 - c. Baseline emissions assumptions and methodology
12. Criteria Pollutant Reductions [Note: if possible, describe or provide a map showing where reductions are occurring.]
 - a. Emissions reductions
 - i. Ozone
 - ii. Nitrogen oxides
 - iii. Particulate matter
 - iv. Volatile organic compounds
 - b. Calculation methodology [Note: include assumptions on vehicle adoption.]
 - c. Baseline emissions assumptions and methodology
13. [Note: include additional, project-specific reporting as detailed in Report Template Appendices.]