This document provides a template for the SB350 Standard Review Programs’ annual report.

**Instructions:**

1. Program implies official name of the program used by the IOU or as identified in the authorizing Decision.
2. Report title: Program name and approval date
3. Submit one report for each individual program including Appendix B as identified here [Supplemental reporting for SRPs](https://www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=6442457048)
4. Provide additional information where necessary, and if a section of this template is not applicable to the program, state ‘not applicable’.

Note: Please do not include these instructions when submitting the report.

#### **Executive summary**:

Provide a one-page description of the program’s goal, budget, and status.

## **Program Background**

1. Provide a description on the program’s objectives, program targets, budget authorized by the Decision, Advice Letter (AL) or any other communication with the Energy Division (ED) staff.
2. Include significant progress milestones such as: number of ports energized, kWh dispensed, cost per port (and port type), budget spending timelines.
3. Include any relevant literature or previous projects that are comparable.

## **Program Metrics**

1. Provide detail description on scope of the program including the direction given in the Decision and modifications or course corrections made via advice letter filings and any other input received from ED staff.
2. Describe participant selection process, status of application timelines/program status (or phase) based on each “SB350 program”.
3. Provide detailed participant selection criteria including reasons for rejection/disqualification.
4. Summarize the information as shown in the sample format Table 1. For Market Sector classification see Table 2.

Table 1: Program Application Summary

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Market sector  | Number of sites in DAC | Number of sites in nonDAC | Total number of applications | Total number of applications rejected/ disqualified |
|  |  |  |  |  |

Table 2: Market Sectors: Program site type classification

|  |  |  |
| --- | --- | --- |
| Market Sector | Program Type | Examples |
| Airport | Light-duty | Commercial, General aviation |
| Small Retail | Light-duty | Convenience Stores, gas stations |
| Retail Business Center / Retail Parking Lot | Light-duty | Shopping center, grocery stores, pharmacy, salons, restaurants, etc. |
| Destination center | Light-duty | Theme parks, sports arenas, shopping malls, etc. |
| Distribution center/warehouse | Light-duty | UPS or FedEx distribution centers, Major retail store warehouses, etc. |
| Government facility | Light-duty | Local, State, Federal, recreational locations (E.g., public swimming pools, golf courses, etc.) |
| Multi-unit dwelling | Light-duty | Apartment buildings, condominiums, townhouses, etc. |
| Public parking | Light-duty | Parking garages, parking structures, parking lots, etc. |
| Seaport | Light-duty | Port of Los Angeles, Port of Long Beach, Port of Oakland, etc. |
| School facility  | Light-duty | Community colleges, trade schools, colleges, universities |
| Transit agency | Light-duty | Any public transit agency |
| Parks | Light-duty | State parks, county/city parks, etc.  |
| Beaches | Light-duty | Public beaches, etc.  |
| School Bus | MD/HD | School bus deployment |
| Transit Bus | MD/HD | Transit bus deployment |
| Medium-Duty Vehicles | MD/HD | Medium-duty vehicle deployment |
| Heavy-Duty Vehicles | MD/HD | Heavy-duty vehicle deployment |
| Port Cargo Trucks | MD/HD | Port cargo truck deployment |
| Airport GSE | MD/HD | Airport ground support equipment deployment |
| Forklifts | MD/HD | Forklift deployment |
| TRU | MD/HD | Transport refrigeration unit deployment |
| TRE | MD/HD | Truck stop electrification |

1. For DCFC, provide any additional knowledge/observations regarding ownership, frequency and popular charging time, electricity consumed etc., including information identified in Table 3

Table 3: DCFC site location summary

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Site ID | County | Market Sector | Number of DCFC ports | Proximity to closest DCFC and other port types | Annual Average Daily Traffic |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. For MDHD include information on typical daily routes, percentage of route through DAC and DAC-adjacent areas (narrative/anecdotal information is sufficient)
2. Identify any unexpected barriers to program participation and/or EV charging cost structures that limited certain customers? Were there any successes that can be used to inform process to improve outreach or participation for customers with more barriers? Provide median timelines (in calendar days) in Table 4.

Table 4: Program timelines

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Program Timeline | Start | End | Calendar Days (median) |
| 1 | Application Reviewal | Application Processed/Complete | Desktop Review Complete |  |
| 2 | Site Assessment | Site Walk  | Preliminary Design Complete |  |
| 3 | Contract Issuance | Contract Issued | Contract Signed |  |
| 4 | Design and Permitting | Final Design and Permitting Start | Final Design and Permitting End |  |
| 5 | Construction Complete | Construction Start | Construction Complete |  |
| 6 | Activation | Construction Complete | Chargers Activated |  |

**Marketing, Outreach, and Education Efforts**

Provide an overview of ME&O efforts, including the items below.

If applicable, add administered surveys as an appendix to the report.

1. Provide a description of outreach and education activities, including efforts to targeted audiences such as disadvantaged communities, low- and middle-income communities, and/or underserved populations. What were the results?
2. Describe any efforts made to advance knowledge of managed charging and other VGI options, as well as environmental and economic benefits. What were the results?
3. Describe any efforts conducted jointly with state, local or federal agencies or other partners.
4. Describe of if any customer outreach efforts increased EV sales/leases in IOU territory. How was this evaluated?
5. Identify any advantages or barriers to participation in marketing, outreach, and education. E.g.
	* + - Efforts to develop channel partnerships including community-based organizations, affordable housing developers, local governments, property management associations, etc.
			- Ease/challenges in channel partnerships with market participants including EVSPs, OEMs, dealers
			- Ease/challenges in coordinating with other state, local and federal agency’s efforts
			- Impact on event location due to participant time constraints, location, lack of available childcare, COVID-19 restrictions, language barriers, etc. How could these be addressed going forward?
	1. Include any project participation survey, program satisfaction surveys that are conducted for each market sector. Provide customer-reported incremental vehicle adoption due to the project. Tabulate this information as shown in the sample Table 5. Include additional columns, as necessary.

Table 5: Program Outreach Efforts Summary

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Total number of survey recipients | Number of survey participants | Market sector | DAC/ nonDAC | Survey Responses/ Comments |
|  |  |  |  |  |
|  |  |  |  |  |

**Diversity Inclusion Efforts:**

1. Explain methods that the utility used to encourage program participation of small, locally owned, minority-owned, and women-owned businesses or customers. What were the results? Provide an estimate of program funds spent towards these efforts.
2. Explain methods that the utility used to contract with diverse business enterprises (DBE) including but not limited to utility personnel or subcontractors in the infrastructure installation, outreach, and education efforts.
3. Provide an estimate of program funds spent on contracts owned or operated by DBE.

Note: ‘Small commercial customer’ as defined in PU Code § 2800(i) meaning ‘a*ny non-residential customer with a maximum peak demand of less than 50 kilowatts.* *The commission may establish rules to modify or change the definition of ‘small commercial customer’, including use of criteria other than a peak demand threshold, if the commission determines that the modification or change will promote participation in proceedings at the commission by organizations representing small businesses, without incorporating large commercial and industrial customers’)*

**Project Safety**

* 1. Provide a report or information demonstrating compliance with the safety checklist requirements as a minimum to ensuring the infrastructure installed is safe and meets all federal, state, and local standards. (See [Safety checklist for large IOUs](https://www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=6442458882), [Safety checklist for small IOUs](https://www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=6442462124))
	2. Provide a description of all the relevant safety requirements met to provide a safe working environment.
	3. Identify if safety officers or managers regularly visit sites and whether all safety regulations, including protective equipment and gear are used by utility personnel, contractors, and sub-contractors
	4. Confirm that contractors/electricians or personnel overseeing the infrastructure installation have been certified by the EV Infrastructure Training Program
	5. Include any safety issues reported during the program and actions taken to correct them

**Equipment Standards:**

Provide a description of the utility’s EVSE qualification and procurement process including:

1. RFP or RFQ requirements (safety, communications, connector standards, ENERGY STAR certifications, etc.)
2. List of vendors and corresponding EVSE models (with power levels, AC/DC, software and hardware communications certifications, ENERGY STAR certification, etc.) that qualified for the program.
3. Provide a list of EVSPs approved by the IOU, their estimated associated costs for operation and their networking fees where applicable.
4. Describe how does the utility provide customers information and detail operational know-how regarding different EVSE and EVSP choices
5. Provide details of any safety requirements and warranty period for EVSE operations.
6. Lessons learned: time for approval (provide timelines if available), process delays, etc.

**Costs:**

1. Provide high-level details on actual and forecasted utility direct costs and reasons for any deviations from forecasted costs.
2. Identify any unexpected costs and their impact on program outcomes.
3. Provide aggregate cost information for each market sector as applicable in Table 6 below.

Table 6: Program Cost Summary

|  |  |  |
| --- | --- | --- |
| Cost Summary | Market Sector X | Market Sector Y |
| Utility Program |  |  |
| DAC |  |  |
| Count of ports energized (EVSE count will be used when port count is unavailable) |  |  |
| Count of Sites |  |  |
| Average site design cost |  |  |
| Average site permits cost |  |  |
| Average separate meter cost |  |  |
| Average cost for site trenching and excavation |  |  |
| Average make-ready cost of infrastructure on the utility side of the meter (TTM) |  |  |
| Average make-ready cost of infrastructure on the customer side of the meter (BTM) |  |  |
| Average projected ongoing maintenance costs for infrastructure |  |  |
| Average Rebate amount applied for EVSE |  |  |
| Average Rebate amount applied for customer-side infrastructure |  |  |
| Average cost for project management & labor |  |  |
| Average cost of EVSE |  |  |
| Average cost / total EVSE kW nameplate  |  |  |

Add columns for each market sector.

1. Provide information on ratepayer funding that supported the infrastructure installation as well as any vehicle/equipment purchases by program participants as shown in Table 7

Table 7: Summary of non-ratepayer funding received

|  |  |  |  |
| --- | --- | --- | --- |
| Market sector  | Program Participants Applied for other Grant Incentive Funding? | Funding source | Amount of funding received |
|  |  |  |  |
|  |  |  |  |

 \*Put “n/a” if not applicable.

**Load Management and Grid Integration:**

1. Provide detailed analysis on how utilization varied over time at sites based on site type and market sector.
2. Provide any reasons you see for this change and its effects on the grid either by time of day or weekday/weekend.
3. Include findings of the load management data for each market sector using session level data where available. If session data is not available, provide details on the algorithm/process used to extract session information from meter data.
4. Include a description of available EV charging cost structures (e.g., credit or debit card, app based, subscription, charged to host or driver, etc.) and customer of records (provide information if they vary based on DAC and nonDAC locations). Narrative/anecdotal information is sufficient.
5. Provide highest and median energy consumption by hour, combined for all sites within a market sector.
6. Provide on-peak consumption and off-peak consumption aggregated for the time frame, by market sector.

Note: Public and private port definitions are per CARB’s SB454 EVSE standards regulation[[1]](#footnote-1)

**Lessons learned:**

Provide an overview of lessons learned: Example efforts to include are below.

1. Provide a summary table illustrating issues that led to delays/difficulties in enrolling customers within each market sector/segment. E.g., Customer application was rejected or lowered in priority due to inadequacy of panel and electrical system capacity at site. How often did this happen? How was this resolved?
2. Provide any challenges faced related to permitting and/or other regulatory compliance.
3. Provide details on any recommendations from program participants, vendors, program partners, stakeholders on how to address future implementation.
4. Provide recommendations to improve efforts to address challenges in outreach and education.
5. Provide an overall project assessment detailing the program’s accomplishments and what improvements/modifications are needed to successfully accelerate scaling up of the market sector.

**EV Adoption and Environmental Benefits:**

Please note that the vehicle adoption and environmental benefits analysis will be presented in the 2022 SB350 evaluator report.

1. [CARB's EVSE standards regulation](https://ww2.arb.ca.gov/sites/default/files/2020-06/evse_fro_ac.pdf) [↑](#footnote-ref-1)