

The Plan will provide the Bay Area and Monterey Bay regions with a clear PEV deployment strategy. Selected contractor will review the Plan and assess the extent to which the Plan is responsive to the required 11 items contained below, the manner in which the recommendations are derived from the analysis, the reliability of the analysis, and the strengths and limitations of the overall methodology and conclusions used in the Plan. This includes ways to clarify assumptions, findings, conclusions, identify oversights, omissions, inconsistencies, and if needed, encourage authors to more fully acknowledge limitations and uncertainties. Selected contractor will provide the substance of their review in the form of “strikeout and underline” and comments on the planning document.

It is anticipated that the Plan will be between 150 - 200 pages in length. The Plan will contain the following information:

- A description of the substantial partnership that supports PEV deployment in the Bay Area and Monterey Bay listing relevant stakeholders, which include:
  - 1) State, local, and tribal governments;
  - 2) all relevant generators and distributors of electricity and utility regulatory authorities;
  - 3) as appropriate, owners and operators of regional electric power distribution and transmission facilities;
  - 4) departments of public works and transportation;
  - 5) owners and operators of property that will be essential to the deployment of a sufficient level of publicly available charging infrastructure (including privately owned parking lots or structures and commercial entities with public access locations);
  - 6) plug-in electric drive vehicle manufacturers or retailers;
  - 7) third-party providers (such as vendors, installers, etc.) of charging infrastructure or services;
  - 8) fleet(s) that will participate in the program;
  - 9) Clean Cities Coalitions;
  - 10) individual consumers and consumer advocate nongovernmental organizations (NGO).
- A clear description of the role and responsibilities of each stakeholder; and a plan for continuing the engagement and participation of the stakeholders, as appropriate, throughout the implementation of the plan.

This includes engagement of major fleet operators to encourage electrification of fleets such as taxis, municipal operations and delivery vehicles.

- A description of the need for a regional plan in light of other regional ongoing efforts toward PEV readiness. This plan segment will also contain an analysis and description of the current plans for plug-in electric drive vehicle deployment in the area/region covered by the plan including:
  - 1) The number of plug-in electric drive (for both heavy and light duty vehicles) vehicles anticipated to be plug-in electric drive privately owned personal vehicles in the Bay Area and Monterey Bay regions with a justification for the estimates provided;
  - 2) the number of plug-in electric drive vehicles anticipated to be privately owned fleet or public fleet vehicles in the Bay Area and Monterey Bay regions with a justification for the estimates provided;
  - 3) an analysis of usage patterns of current PEV vehicles.

The Plan will also contain the results from an analysis of barriers to the implementation of plug-in electric vehicles and deployment and ongoing management of infrastructure in the Bay Area and Monterey Bay regions and discuss steps to reduce or eliminate the identified barriers.

- A plan segment that identifies sites of regional charging infrastructure. The plan will provide locations for PEV infrastructure (for both heavy and light duty vehicles) in the Bay Area and Monterey Bay regions that will provide public access to charge points on public property, commercial property, highway corridors, and workplaces currently and for the year 2014 taking into account the varying urban, suburban and rural characteristics within the regions. The plan will identify the methodology employed to identify these locations, the quantity of infrastructure needed and the investment and sources of investment required to implement infrastructure installation. This plan segment will be based on region-specific planning data to support infrastructure deployment, including the previous studies, employer/workplace engagement, transportation studies, and estimates of current and future PEV deployment. The plan segment will also provide the basis for the estimates of current and future PEV deployment.

The plan segment will also include an analysis of projected residential, workplace, private, and publicly available charging infrastructure, including:

- 1) Primary and secondary potential charging locations; 2) an estimate of the number of consumers who will have access to private residential charging infrastructure in single-family or multifamily residences; 3) an estimate of the number of consumers who will have access to workplace charging infrastructure; 4) an estimate of the number and location of publicly and privately owned charging stations that will be publicly or commercially available; 5) an estimate of the number and location of charging infrastructure that will be privately funded or located on private property; 6) an estimate of the potential costs associated with EVSE deployment and potential sources of funding, including an analysis of the business case for charging fees, etc. there could be used outside of government support to accomplish this deployment; 7) the analysis will use consumer charging data to be provided by the Air District and its partners; 8) the analysis will also include workplace and fleet user survey data to be provided by the Air District and its partners; 9) this plan segment will also include a methodology to provide updated regional planning data for future iterations of this planning process.
- A plan segment which describes the development of regionally specific guidelines for PEV infrastructure deployment, for residential single- and multi-dwelling units, commercial and public areas, and fast charging units in strategic locations. This segment will identify issues to be considered in the deployment of infrastructure guidelines, identify what additional guidelines need to be developed based on the gaps and deficiencies analysis, and will also identify and address the unique challenges of installing and sustained management of infrastructure at multifamily residential buildings.
    - A plan segment to update construction permitting or inspection processes to allow for expedited installation of charging infrastructure for purchasers of plug-in electric drive vehicles, including a permitting process that allows a vehicle purchaser to have charging infrastructure installed rapidly (24 - 48 hours is a suggested target goal for private residential applications or permit by notification). This information is based on the information gathered by the Air District and Clean Cities Coalitions from Bay Area and Monterey Bay local and county governments regarding existing (current) procedures and standards for permitting inspection.

The plan segment will also include a methodology for PEV-friendly buildings and public works, including pre-installation checklists and post-commitment streamlining of EVSE permitting, installation, and inspection processes as follows:

1) Development and deployment of common pre-purchase EVSE installation inspection processes for PEV buyers and “hand-raisers” including: i) pre-installation checklist with original equipment manufacturers (OEMs), auto dealers and utilities; ii) streamlined and uniform EVSE inspection processes in collaboration with associations of building inspectors and other regional CalPEVCC stakeholders. 2) post-commitment: streamlining local EVSE permitting, installation and inspection process of PEV infrastructure by: i) local collaboration of OEMs, utilities, installers and inspectors to accelerate residential EVSE installations and meet PEV customers’ expectations.

This plan segment will also include an estimate of the cost for local governments to employ these procedures and an analysis of sources of funding to allow for the implementation.

- A plan segment to update zoning, parking rules, or other local ordinances as are necessary to facilitate the installation of publicly available charging infrastructure and to allow for access to publicly available charging infrastructure, as appropriate. Attention will be given to compliance with the American with Disabilities Act, as applicable.

This segment will be based on the information gathered by the Air District and Clean Cities Coalitions from Bay Area and Monterey Bay local and county governments regarding current “on-the-ground” zoning, parking rules and local ordinances. The Plan will also identify how the plan supports existing local climate action plans and how existing climate action plan implementation efforts can support PEV plan implementation. This plan segment will also include an estimate of the cost for local governments to employ these updates and an analysis of sources of funding to allow for their implementation.

- A plan segment to update building codes during the contract term to include charging infrastructure or dedicated circuits for charging infrastructure, as appropriate, in new construction and major renovations.

This segment will be based on the information gathered by the Air District and Clean Cities Coalitions from Bay Area and Monterey Bay local and county governments regarding current “on-the-ground” building codes. The Plan will also identify how the plan supports existing local climate action plans and how existing climate action plan implementation efforts can support PEV plan implementation. This plan segment will also include an estimate of the cost for local governments to employ these updates and an analysis of sources of funding to allow for the implementation. Also this plan segment will incorporate a requirement that updated building codes specify that only EVSE that is commercially available (i.e. pre-commercial demonstration or research & development components are not desirable) be used for the inclusion of charging infrastructure and dedicated circuits in new construction and major renovation. “Commercially Available” EVSE is defined as equipment that is available for purchase and unrestricted operation by the general public, is fully compliant with all applicable

standards and safety regulations (ex: SAE, UL Listing or equivalent), and will be installed by a certified electrician.

- A plan segment for planning effective marketing, outreach, training, and education relating to PEV, charging services, and infrastructure. This segment will include mechanisms to provide specialized training and education necessary to ensure that vehicles and related electric charging equipment is installed, maintained, and operated in a safe and proper manner. Training will address EVSE functions and product types, safety and code issues, inspection and compliance issues and installation process streamlining and trouble-shooting. This includes training for electric charging point users, facilities public works personnel and OEMs, first responders, public safety officers, inspectors, installers, and construction permitting officials in areas where electric charging is being introduced, among other target audiences.
- A plan segment which defines mechanisms to provide PEV education and to promote the benefits of PEV adoption in alignment with PEV marketing plans under development by regional agencies including the Metropolitan Transportation Commission (MTC) to the extent feasible. This plan segment will include the development and execution of educational “EV 101”. It will also contain an analysis of existing level of public awareness of the benefits of PEVs and the potential strategies to build public awareness.

Additionally it will assess mechanisms to communicate available or anticipated benefits or incentives for plug-in vehicle owners; and identify and establish other potential needed or desired benefits or incentives. These may include:

1) Rebates to reduce the purchase price of the vehicle; 2) state and federal tax incentives/credits; 3) reductions in sales taxes or registration fees; 4) rebates or reductions in the costs of permitting, purchasing, or installing home plug-in electric drive vehicle charging infrastructure; 5) rebates or reductions in State or local toll road access charges; 6) additional consumer benefits, such as preferred parking spaces or single-rider access to high-occupancy vehicle lanes for plug-in electric drive vehicles.

- A plan segment which defines mechanisms to minimize grid and utility impacts. This segment will include an analysis of potential impacts to the grid of mass EV adoption in the Bay Area and Monterey Bay regions and define mechanisms for:

1) Ensuring that the charging infrastructure or PEV are able to send and receive the information needed to interact with the grid and be compatible with smart grid technologies to the extent feasible 2) mechanisms to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar; 3) ways to maximize the use of public funds for PEV charging while reducing stranded EVSE.

Additionally this segment will describe utility, grid operator, or third-party charging service provider, policies and plans for accommodating the deployment of plug-in electric drive vehicles, including: 1) Rate structures or provisions and billing protocols for the charging of plug-in electric drive vehicles; 2) a proposed plan for making widespread utility and grid upgrades.