

Peninsula Clean Energy EV Ready Program Strategy

July 2020

PREPARED BY CLEARResult

PREPARED FOR Peninsula Clean Energy



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1. Purpose

The purpose of this document is to describe the strategy for achieving the Peninsula Clean Energy (PCE) EV Ready Program 3,500 port goal within its approved incentive budget. All strategies have been designed to support the qualitative goals of the program, which are:

1. Enculturate the notion that scaled deployments of charging infrastructure are needed and appropriate now. Scaled deployment means looking to a 5-10-year time horizon and broadening the view of electric transportation to include e-motorcycles, e-bikes, e-scooters, and other forms of e-mobility.
2. Make EV adoption easy for property owners: Fostering the sense that EV charging projects are not difficult.
3. Reach a broad market as cost-effectively as possible: Establishing Level 1 charging as viable and appropriate both for EVs and other e-mobility as well as load management systems for Level 2 charging that allow for an expanded number of EV ports within existing electrical capacity.
4. Market transformation: Strengthening the overall EV charging ecosystem of contractors, electrical capacities, integrated marketing opportunities, and other market forces.

Ultimately, the program’s achievement of both quantitative and qualitative goals is expected to accelerate the deployment of electric transportation within Peninsula Clean Energy’s customer base and support community-wide efforts to be completely GHG-free by 2045.

Table 1. Forecast of Charge Ports by Type Installed and Incentive Program Utilization

EVSE Type	PCE EV Charger Incentives	CALeVIP	BAAQMD or Unincentivized
Level 1	1,075 ports	N/A	N/A
Level 2	310 ports	1,755 ports	210 ports
DCFC	N/A	150 ports	N/A
Total	1,385 ports	1,905 ports	210 ports
	3,500 ports		

2. Program Strategy

The EV Ready Program is designed to achieve program goals by providing property owners with an end to end service that includes outreach, education, site visits, and technical services. The following sections describe this core delivery strategy.

2.1 PROGRAM MARKET SEGMENTS

The program is focused on serving Peninsula Clean Energy’s workplace and multifamily customer segments. Customers in these segments will be driven to enroll in the program by these targeted marketing and outreach tactics of the program. Outreach sequencing and strategy is described in Section 3.

Table 2. Eligible Program Segments with Port Projections

Target Segment	Eligible Sub Segments	Marketing & Outreach Tactics	Port Projection
Multifamily	Multifamily – Small & Medium	In addition to the program website, word of mouth, and CALeVIP marketing, Account Manager & Phone Advisor outreach to organizations that manage, own, or develop multifamily sites. If a key account, PCE Account Manager will initiate contact.	L1: 650, L2: 200
	Multifamily – Large		L1: 300, L2: 70

	Affordable Housing Multifamily	PCE staff will lead outreach to CBO's and affordable housing organizations.	L1: 100, L2: 40
Workplace	Large Office	In addition to the program website, word of mouth and CALeVIP marketing, Account Manager and Phone Advisor outreach to sites that are not part of a building portfolio. If a key or public agency account, PCE Account Manager will initiate contact.	L2: 800
	Government & Schools		L1: 50, L2: 340
	Other Commercial		L2: 800
Other	DCFC	Account Manager outreach when requested by PCE	DCFC: 150

2.2 PROGRAM OFFERINGS

The program includes the following standard offerings for eligible sites.

Table 3. Program Offering Descriptions

Category	Description
Outreach	In addition to providing phone support for enrollments recruited from the website and marketing campaigns, EV Phone Advisors will provide phone outreach during targeted campaigns (see Section 3). Account Managers will conduct outreach focusing on sites likely to install more than ten charge ports and owners with multiple properties.
Site Qualification	Site qualifications are designed to yield reciprocal information. For the program, it will confirm program site enrollment requirements are met, reveal property owner goals, and identify potential barriers. For property owners, it will provide program information and education about the benefits of EV and EVSE. Account Managers may fold site qualification elements into their outreach or initial meetings. EV Phone Advisors will typically conduct individual site qualifications remotely.
Account Management	Account Managers and EV Phone Advisors will be the point of contact for end to end support. EV Phone Advisors will be available to all owners via phone and email. Account Managers will be assigned to larger projects or owners with multiple projects.
Charging Evaluation (CE)	<p>The CE process involves site data collection, electrical load calculation and capacity analysis, and description of a site's electrical infrastructure, parking layout, estimated budget, potential construction and permit issues, and, ultimately, EVSE capacity. Under certain circumstances where electrical capacity is uncertain, a full load study with 30 days of monitoring may also be recommended if its costs do not exceed \$1,000 or 10% of project cost, whichever is greater.</p> <p>A CE report will be produced for all projects and present potential scopes that leverage Level 1 and Power Managed Level 2 ports. The scopes will often utilize a “good, better, and best” fashion. “Good” will match Level 1 and Level 2 EVSE quantities, including power managed L2 options, to existing infrastructure. “Better” will introduce optimized power management concepts to increase EVSE quantities. “Best” will maximize EVSE quantity, known site considerations, and infrastructure upgrades yielding substantial increase in ports at a cost-effective price. Exceptions to this framework may be made, such as when a customer has already indicated an expectation of the “Best” solution and therefore it is undesirable to present inferior options. All scopes will also determine whether panel, service, or building electrification upgrades are appropriate.</p> <p>EV Phone Advisors and Account Managers will use the CE report delivery meeting to discuss each option, present the advantage of the “Better” and “Best” options to encourage larger scale projects, and, if necessary, discuss variations to final project scope based on customer feedback and needs.</p>
Request for Proposals (RFP)	Account Managers and EV Phone Advisors can provide owners with an RFP based on the chosen CE scope. Owners are encouraged to use the program's Trade Allies whom are all local union affiliated contractors to ensure high quality installations. Peninsula Clean Energy also offers qualified EVSE with preferred pricing. Account Managers and EV Phone Advisors may also assist owners with proposal evaluations.

Incentive Application	Support for incentive applications includes assistance with required documentation, pertinent requirements, and general information and is provided by EV Phone Advisors and Account Managers. While program staff can serve as guides in the incentive process, owners will ultimately be responsible for application submissions.
EVSE Installation	Program staff will support installation contractors by providing streamlined communications with permit authorizing bodies, incentive documentation management, and change order management. Energy engineers will also be available to owners and installation contractors for technical questions and support, with requests routed through the Account Managers and EV Advisors. PCE will collect all data associated with the installation, such as permit costs and scope changes, to better inform project cost estimates for future projects.
Customer Support	All Support Tiers (Section 2.3) include end to end customer support beyond the categories above. Both Account Managers and EV Advisors can provide best practice recommendations for EVSE commissioning, operations, parking, and vehicle charging pricing policies based on each site’s needs. This support can be provided post installation.

2.3 SUPPORT TIERS

The program will provide the above offerings in the following Support Tiers to manage resources while providing assistance to all eligible customers who express commitment to complete an EVSE project. These support tiers provide a high, yet appropriate level of service based on property and project needs and characteristics.

Table 4. Descriptions of Support Tiers and Site Characteristics

Support Tiers	Description	Property/Project Characteristics
Standard (Remote assistance & support)	<ol style="list-style-type: none"> 1. Determine if site visit is required. If yes, move to Standard with On-Site Audit tier 2. EV Phone Advisor addresses technical, education, and available incentive program questions 3. Provide CE produced with remote site information (e.g. Google Earth, customer interview), site design templates and design strategies, including load management recommendations 4. Present the CE’s advantage of the “Better” and “Best” options to encourage increased port installation and, if necessary, discuss variations to final project scope based on customer feedback and needs 5. Referral to program trade ally and negotiated equipment list 6. Support customer with milestone check-ins throughout the project including: CE options, Trade Ally selection, as needed construction support, installation and commissioning, and final project wrap up 7. EV Phone Advisor provides policy/operations support as referenced in Section 2.3 (Table 4 Customer Support) 	<p>Property owners with single projects installing <10 EV spaces due to limited parking capacities</p> <ul style="list-style-type: none"> • Multifamily: <10 total parking spaces available • Workplace: <50 total parking spaces available
Standard with On-Site Audit (Adds On-Site Audit & custom CE)	<ol style="list-style-type: none"> 1. In addition to ‘Standard’ services, the site typically also receives the following: <ol style="list-style-type: none"> 1. An On-Site Audit that surveys the building electrical system and parking area 2. Provide CE produced with On-Site Audit and site information 2. Account Management team encourages participants to move forward with projects that match or align with the “Better and “Best” options 3. Account Management team also provides policy/operations support as referenced in Section 2.3 (Table 4 Customer Support) 	<p>Target outreach participants that have projects that can support at least 10 EV spaces</p> <ul style="list-style-type: none"> • Multifamily: 10+ total parking spaces available • Workplace: 50+ total parking spaces available • Include sites adding to existing EV spaces

	<ol style="list-style-type: none"> 4. Projects with a high port opportunity and owner interest will seamlessly move into the Premier tier 	
<p>Premier (Enhanced engineering)</p>	<ol style="list-style-type: none"> 1. In addition to the two tiers previously described, engineering design support to enable evaluation of a major unique site and/or utility infrastructure upgrade 	<p>Target outreach participants that have projects that can support at least 20 EV spaces or require complex panel or service upgrades</p>

2.4 COST CONTAINMENT STRATEGIES

In addition to the previously described Support Tiers, the program will apply the following Cost Containment Strategies across its offerings.

Table 5. Cost Containment Strategies and Objectives

Cost Containment Strategy	Description	Objective
1. Level 1 & L2 Power Management	Develop site engineering guidelines that leverage Level 1 and power management strategies to maximize port counts per project. This approach considers a site’s existing power capacity to minimize additional infrastructure work while adhering to the program’s “scaled deployment” goals. Examples of leveraging existing infrastructure include daisy chaining 3-4 L2 chargers per circuit or strategically utilizing excess electric panel capacity with L1 circuits.	Minimize power infrastructure project costs to increase likelihood of installation
2. Panel or Service Upgrade	Recommend main panel and service upgrade for projects where a higher number of ports offsets the upgrade costs. An exception will be sites which have no available capacity to support even a modest project without a panel upgrade. When panel or service upgrades are recommended, Level 1 and Power Managed Level 2 EVSE will always be recommended.	Maximize ports when panels or service are upgraded in order to achieve better per port costs.
3. Streamlined Site Design Templates	Track site design traits by segment and develop “cookie cutter” design strategies to provide best practice layout, power management, EVSE options, and maximum port counts for CEs. The program will launch with streamlined design strategies addressing large office, garden MUDs, small MUDs, and buildings constructed to CalGreen EV Capable codes. Additional streamlined designs will be developed throughout the program based on CE trends recommended by segment. Templates for large modern commercial, garden MUD, and large modern MUD have been developed for program launch. Additional templates will be developed as more building types are encountered.	Leverage accumulated design best practices to provide lower cost solutions, even for smaller sites where in-depth evaluations are impractical
4. EVSE RFQ	Create a negotiated equipment list by releasing an EVSE hardware RFQ based on specifications aligned with program’s target markets that can benefit from preferred pricing models for site owners. There is also potential for collaboration with other CCA’s and other agencies for a larger Bay Area EVSE hardware RFQ. In turn, EVSE OEMs can maximize sales in accordance with program’s “scaled deployments” goals.	Provide a “cost” advantage benefit option for program participants
5. Manufacturer/Trade Allies Alignment	Promote the program’s scaled deployment strategy by engaging market actors (e.g. manufacturers, network operators, trade allies) operating in the program service area. The program team will educate market actors to promote adoption of the engineering and port acquisition strategies outlined in this document. Benefits to the market actors include larger port implementations for their projects. The program, meanwhile, should receive better insight to projects being implemented and how they are aligned with program goals.	Additional channels for recruiting and developing scaled deployments, especially those utilizing power management
6. Future Electrification	Provide recommendations for main panel and service upgrades that provide future capacity for EV Capable	Maximizes panel and service upgrade

	parking space circuits and other building electrification.	investments for future needs
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3. Port Acquisition

The program will serve all multifamily and workplace customer segments throughout the program to reach the 3,500-port goal, but the Account Management and EV Phone Advisor teams will conduct targeted outreach in the sequence shown below. The following targeted outreach strategy descriptions apply to the vast majority of projects, with the exception of DCFC projects, that will typically be assigned by Peninsula Clean Energy and CALeVIP. The current port acquisition sequence below assumes California’s shelter in place COVID-19 response is lifted by Q3 2020.

Table 6. Targeted Outreach Timeline with Project Port Acquisition

Customer Segment	2020 Q2	2020 Q3*	2020 Q4**	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022+	Ports
1. Key Accounts – Soft Launch									100
2. Affordable Housing									140
3. Large Multifamily									370
4. Large Workplace									700
5. Small & Medium Multifamily									850
6. Gov’t & Schools									390
7. Other Commercial									800

*CALeVIP cost incurring period begins

**Intended CALeVIP Incentive Application and BAAQMD Grant Application launches

1. Key Accounts – Soft Launch															
Overview	Anchor program with >4 sites that yield more than 20 ports each for a total of 100 ports														
Target Customers	The top 50 (by employee/residential unit count) PCE key accounts that are owner or anchor tenant occupied commercial office customers, large MUD customers, and modern large commercial sites built with CalGreen EV Capable standards. Customer sites should have more than 100 parking spaces.														
Outreach Timing	June 2020 (Outreach & Engagement Start) – December 2020														
Approach	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Task</th> <th>Responsible</th> </tr> </thead> <tbody> <tr> <td>Develop target list using Costar and any other PCE-provided data identifying Key Accounts</td> <td>CR Client Analytics</td> </tr> <tr> <td>Identify decision maker and secure meeting</td> <td>PCE Account Manager + CR Account Manager</td> </tr> <tr> <td>Prepare tailored presentation emphasizing soft launch value proposition</td> <td>CR Account Manager</td> </tr> <tr> <td>Customer meetings to secure commitment</td> <td>PCE Account Manager + CR Account Manager</td> </tr> <tr> <td>Provide strong design assistance to get projects scoped and out to bid</td> <td>CR Engineering + Arup</td> </tr> <tr> <td>Assign technical resources to up to five sites that pledge to complete a project with >20 ports</td> <td>CR Program Manager</td> </tr> </tbody> </table>	Task	Responsible	Develop target list using Costar and any other PCE-provided data identifying Key Accounts	CR Client Analytics	Identify decision maker and secure meeting	PCE Account Manager + CR Account Manager	Prepare tailored presentation emphasizing soft launch value proposition	CR Account Manager	Customer meetings to secure commitment	PCE Account Manager + CR Account Manager	Provide strong design assistance to get projects scoped and out to bid	CR Engineering + Arup	Assign technical resources to up to five sites that pledge to complete a project with >20 ports	CR Program Manager
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Provide strong design assistance to get projects scoped and out to bid	CR Engineering + Arup														
Assign technical resources to up to five sites that pledge to complete a project with >20 ports	CR Program Manager														
Expected Result	<p>Delivers 240 ports and provides an opportunity to celebrate customers' large commitments at the time of PCE, CALeVIP and BAAQMD launches in 2020.</p> <ul style="list-style-type: none"> 100 L2 ports with CALeVIP 100 L2 ports with BAAQMD and/or unincentivized by CALeVIP 30 L1 ports and 10 L2 ports with PCE MUDs 														
Likely Scenario with COVID-19 Impact	<p>Decreases to 100 ports due to activity launch during COVID-19 transition from shelter in place period.</p> <ul style="list-style-type: none"> 80 L2 ports with CALeVIP 20 L2 ports with BAAQMD and/or unincentivized by CALeVIP 														

2: Affordable Housing																			
Objective	Attain 100 L1 ports and 40 L2 ports in Affordable Housing projects																		
Target Customers	Retrofit and new construction sites, including modern multifamily sites built with CalGreen EV Capable standards, that consist entirely of below market rate units whose sale prices or rents are governed by local agencies to be affordable based on area median income																		
Outreach Timing	September 2020 (Outreach & Engagement Start) – December 2022																		
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	Provide additional education and resources to property managers and tenants addressing EVSE 101 and EV adoption	CR Account Manager																	
	Provide strong design assistance to get projects scoped and out to bid	CR Engineering																	
Assign technical resources sites that pledge to complete a project with >20 ports	CR Program Manager																		
Expected Result	Delivers 200 ports <ul style="list-style-type: none"> 100 L1 ports and 100 L2 ports with PCE MUD 																		
Likely Scenario with COVID-19 Impact	Still delivers 140 ports over the program period <ul style="list-style-type: none"> 100 L1 ports and 40 L2 ports with PCE MUD 																		

3. Large Multifamily																							
Objective	Attain 370 ports (excludes Soft Launch) with at least a 3-to-1 ratio of L1-to-L2 ports																						
Target Customers	Primarily larger multifamily sites with >100 residential units and more modern multifamily sites built with CalGreen EV Capable standards																						
Outreach Timing	September 2020 (Outreach & Engagement Start) – end of program																						
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Assign technical resources to sites that pledge to complete a project with >10 ports	CR Program Manager																						
Provide additional education and resources to property managers and tenants addressing EVSE 101 and EV adoption	CR Account Manager																						
Expected Result	<p>Achieves 370 ports excluding Soft Launch</p> <ul style="list-style-type: none"> • 300 L1 ports and 70 L2 ports with PCE 																						
Likely Scenario with COVID-19 Impact	<p>Still achieves 370 ports</p> <ul style="list-style-type: none"> • 275 L1 ports and 70 L2 ports with PCE • 25 L2 ports with CALeVIP 																						

4. Large Workplace		
Objective	700 ports in large workplace sites (excludes Soft Launch)	
Primary Target Customers	Primarily large PCE key account workplaces (e.g. Walmart corporate, Genentech) and modern large commercial sites built with CalGreen EV standards with >100 parking spaces and strong sustainability programs that can tie into the program	
Outreach Timing	December 2020 (Outreach & Engagement Start) – end of program	
Approach	Task	Responsible
	Develop target list using Costar and any other PCE-provided data identifying large workplaces	CR Client Analytics
	Identify decision maker and secure meeting	PCE Account Manager + CR Account Manager
	Prepare tailored presentation emphasizing large workplace value proposition	CR Account Manager
	Customer meetings to secure commitment	PCE Account Manager + CR Account Manager
	Provide strong design assistance to get projects scoped and out to bid	CR Engineering + Arup
	Assign technical resources to sites that pledge to complete a project with >20 ports	CR Program Manager
	Provide additional education and resources to property managers and tenants addressing EVSE 101	CR Account Manager
Expected Result	Achieves 550 ports excluding Soft Launch <ul style="list-style-type: none"> 450 L2 ports with CALeVIP 100 L2 ports with BAAQMD and/or unincentivized by CALeVIP 	
Likely Scenario with COVID-19 Impact	Achieves 700 ports due to reduction in Soft Launch and assumes <ul style="list-style-type: none"> 550 L2 ports with CALeVIP 150 L2 ports with BAAQMD and/or unincentivized by CALeVIP 	

5. Small & Medium Multifamily																							
Objective	Attain 850 ports with at least a 3-to-1 ratio of L1-to-L2 ports																						
Target Customers	Multifamily sites with <20 residential units																						
Outreach Timing	December 2020 (Outreach & Engagement Start) – end of program																						
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Expected Result	Delivers 790 ports <ul style="list-style-type: none"> 590 L1 ports and 200 L2 ports with PCE 																						
Likely Scenario with COVID-19 Impact	Delivers 850 ports <ul style="list-style-type: none"> 650 L1 ports and 200 L2 ports with PCE 																						

6. Government & Schools													
Objective	Attain 390 ports at government and school sites												
Target Customers	Government and school facilities with 50+ parking spaces												
Timing	February 2021 (Outreach & Engagement Start) – end of program												
Approach	<table border="1"> <thead> <tr> <th>Task</th> <th>Responsible</th> </tr> </thead> <tbody> <tr> <td>Target government and school facility managers with a digital campaign on LinkedIn</td> <td>PCE Marketing + CR Marketing</td> </tr> <tr> <td>Identify decision maker and secure meeting through existing government partnerships</td> <td>PCE Account Manager</td> </tr> <tr> <td>Prepare tailored presentation emphasizing value proposition</td> <td>CR Account Manager</td> </tr> <tr> <td>Provide strong design assistance to get projects scoped and out to bid</td> <td>CR Engineering + Arup</td> </tr> <tr> <td>Assign technical resources to sites that pledge to complete a project with >20 ports</td> <td>CR Program Manager</td> </tr> </tbody> </table>	Task	Responsible	Target government and school facility managers with a digital campaign on LinkedIn	PCE Marketing + CR Marketing	Identify decision maker and secure meeting through existing government partnerships	PCE Account Manager	Prepare tailored presentation emphasizing value proposition	CR Account Manager	Provide strong design assistance to get projects scoped and out to bid	CR Engineering + Arup	Assign technical resources to sites that pledge to complete a project with >20 ports	CR Program Manager
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Assign technical resources to sites that pledge to complete a project with >20 ports	CR Program Manager												
Expected Result	<p>Delivers 450 ports</p> <ul style="list-style-type: none"> • 400 L2 ports with CALeVIP • 50 L2 ports with BAAQMD and/or unincentivized by CALeVIP 												
Likely Scenario with COVID-19 Impact	<p>Delivers 390 ports</p> <ul style="list-style-type: none"> • 300 L2 ports with CALeVIP • 40 L2 ports with BAAQMD and/or unincentivized by CALeVIP • 50 L1 ports with PCE 												

7. Other Commercial																	
Objective	Attain 800 ports in other commercial workplace sites, such as small and medium sized retail, strip malls, light industrial, and light distribution																
Target Customers	Commercial workplace sites with <100 parking spaces																
Outreach Timing	May 2021 (Outreach & Engagement Start) – end of program																
Approach	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Task</th> <th style="width: 30%;">Responsible</th> </tr> </thead> <tbody> <tr> <td>Develop target list using Costar and any other PCE-provided data identifying commercial workplace accounts</td> <td>CR Client Analytics</td> </tr> <tr> <td>Target commercial workplace accounts with a digital campaign</td> <td>PCE Marketing + CR Marketing</td> </tr> <tr> <td>Targeted call campaign seeking to identify decision maker and secure phone/online meeting</td> <td>CR Outbound Call Center</td> </tr> <tr> <td>Prepare tailored presentation emphasizing access to program engineering resources and segmented value proposition to secure commitment</td> <td>CR EV Phone Advisor</td> </tr> <tr> <td>Provide strong design assistance to get projects scoped and out to bid</td> <td>CR Engineering + Arup</td> </tr> <tr> <td>Assign technical resources to sites that pledge to complete a project with >20 ports</td> <td>CR Program Manager</td> </tr> <tr> <td>Provide additional education and resources to property managers and tenants addressing EVSE 101</td> <td>CR Account Manager</td> </tr> </tbody> </table>	Task	Responsible	Develop target list using Costar and any other PCE-provided data identifying commercial workplace accounts	CR Client Analytics	Target commercial workplace accounts with a digital campaign	PCE Marketing + CR Marketing	Targeted call campaign seeking to identify decision maker and secure phone/online meeting	CR Outbound Call Center	Prepare tailored presentation emphasizing access to program engineering resources and segmented value proposition to secure commitment	CR EV Phone Advisor	Provide strong design assistance to get projects scoped and out to bid	CR Engineering + Arup	Assign technical resources to sites that pledge to complete a project with >20 ports	CR Program Manager	Provide additional education and resources to property managers and tenants addressing EVSE 101	CR Account Manager
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Provide additional education and resources to property managers and tenants addressing EVSE 101	CR Account Manager																
Expected Result	<p>Delivers 800 ports</p> <ul style="list-style-type: none"> 800 L2 ports with CALeVIP 																
Likely Scenario with COVID-19 Impact	<p>Still delivers 800 ports assuming COVID-19 restrictions are fully lifted by 2021</p> <ul style="list-style-type: none"> 800 L2 ports with CALeVIP 																

4. Additional Program Elements

The program includes additional components critical to program success.

4.1 MARKETING

CLEAResult Marketing will develop and deliver the following.

Deliverable	Description	Schedule
Market Analysis	Uses commercial and certain customer data (e.g., CoStar, Experian, Levy-Englander) to identify each customer and tactical segment characteristics and key points of contacts for outreach.	Prior to Account Management launch
Program Website	Content for customer facing site that will provide pertinent program information, links, and navigation for online enrollments into the Technical Assistance portal and incentive program applications. Content evolves based on available incentive program launches.	Phases launch in coordination with incentive program launches
Collateral	Includes direct customer items, namely program fact sheets and presentation templates based on building, customer segment, and tactics for engagement. Publicly facing items include press releases and case studies. Messaging will focus on the program’s success in “scaled deployments” and importance of Level 1 charging options relative to customer segment and tactic.	Direct customer items ready by Account Management launch and publicly facing items as needed
Digital	Digital campaigns leveraging LinkedIn to target property owners and managers and other social media to target EV drivers to communicate demand for more chargers will be developed after CALeVIP launches.	As needed based on first program year results and needs

4.2 TRADE ALLY MANAGEMENT

Trade Allies will provide design and construction of the make ready infrastructure and installation of the EVSE. In addition, they may contribute to the program’s pipeline by recruiting customers, resulting in them receiving more business. The program aims to manage a well-qualified Trade Ally network made up of union member firms to meet program goals and maintain a high level of customer satisfaction. The program team will develop the following items for recruitment and management.

Activity	Description
Recruiting Materials	Recruiting materials include an invitation email and introductory presentation describing program overview and Trade Ally Participation Agreement
Recruit	Contractors and professional associations including International Brotherhood of Electrical Workers, Building Owners, National Electrical Contractors Association, and other unions will be invited by an email that describes program overview, Trade Ally application process, and an in person meeting or webinar.
Onboard	Program staff will intake, process, and maintain Trade Ally Participation Agreement and required certification documents.
Train	In person and virtual training opportunities for Trade Ally enrollment, program information, best practices, training materials, and marketing collateral will be provided.
Monitor	Program staff will monitor and score Trade Allies based on activity level and quality of work.

4.3 LOW CARBON FUEL STANDARD CREDITS

Peninsula Clean Energy intends to capture all LCFS credits from any fuel supply equipment that it funds or facilitates. These funds will be used to support the deployment of EV charging infrastructure and EV adoption in San Mateo County, pursuant to California Air Resource Board Low Carbon Fuel Standard Guidance 20-03.

Customers may be required or requested to voluntarily designate their eligibility to generate LCFS credits, per CARB Low Carbon Fuel Standard regulation 95483.(c)(2)(B). Customers receiving either PCE EV Charger Incentives and/or other regional funds such as BAAQMD that have been facilitated through assistance from PCE are required to designate their LCFS credit generation eligibility to PCE. Customers receiving CALeVIP funding are not required to designate LCFS credit generation eligibility to PCE. However, customers may do so voluntarily.

Appendix

1. Customer Participation Agreement
2. Program Operations Manual (Available August 2020)
3. Trade Ally Application
4. Marketing Collateral