

# TAM PUBLIC AGENCY

## Toolkit for Electric Vehicles and Charging Infrastructure





# TABLE OF CONTENTS

- Executive Summary 02
- Introduction 03
- EV Benefits for Public Agencies 04
- Rebates for EVs and Charging Stations 05
- How to Convert Fleet to EVs 07
- EV Incentives Based on Vehicle Type 09
- How to Apply for EV Fleet Rebate 11
- Other EV Fleet Resources 14
- Installing EV Supply Equipment 15
- EV Charger Types 15
- Rebates for Chargers 16
- Determining EV Charger Needs 17
- Planning and Permitting Tips 21
- How to Apply for TAM EVSE Grant 22
- Other EVSE Funding Resources 23



**TAM Public Agency**  
 Toolkit for Electric Vehicles  
 and Charging Infrastructure

# EXECUTIVE SUMMARY

The Transportation Authority of Marin recognizes that adding electric vehicles to fleets and improving access to charging stations are actions agencies across Marin County can take to reduce greenhouse gas emissions. Moreover, those steps deliver other important benefits to the communities served by those agencies, as well as helping reduce the overall operating costs for agency fleets. The Transportation Authority of Marin is providing programs and connecting agencies to relevant third party efforts that can assist agencies throughout Marin in making the transition to zero emission transportation.

**Our resource toolkit for agencies is designed to help them better understand:**

- Benefits of electric vehicles
- How to add EVs to fleets
- How to identify funding sources that can help make these projects a reality.
- How to develop electric vehicle service equipment (EVSE better known as EV charging stations) projects

Agencies can use both this toolkit and TAM as a resource before, during, and after an EV project.

## INTRODUCTION

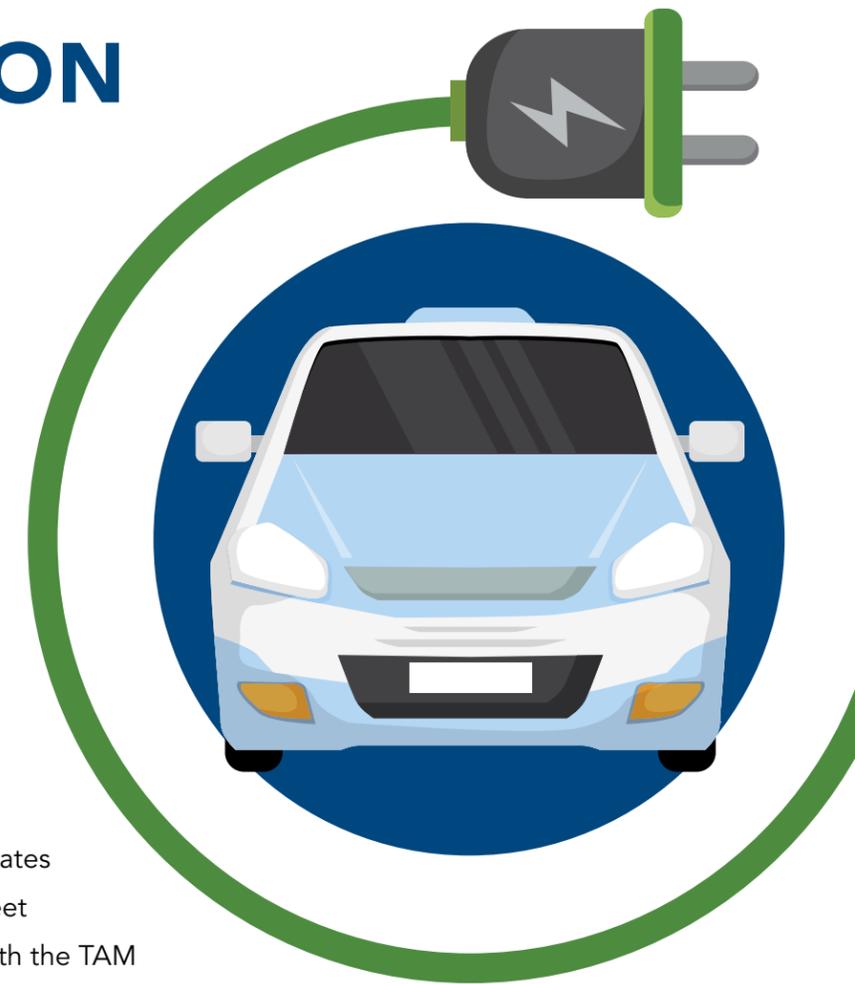
Marin County is committed to reducing greenhouse gas emissions and public agencies can play an important role in using electric vehicles (EVs) or other low emission vehicles for their fleets, installing charging stations, and promoting clean transportation.

The Transportation Authority of Marin (TAM) provides resources and rebates for public agencies to make it easier to add EVs to their fleets and install/upgrade charging stations. Agencies can apply for rebates up to \$5,000 per vehicle with the TAM EV Fleet Program and up to \$3,000 for EV chargers with the TAM Electric Vehicle Supply Equipment (EVSE) Grant Program.\*

Combining TAM rebates with those available from [MCE](#), [Bay Area Air Quality Management District](#) and others can save agencies thousands of dollars as they transition to cleaner vehicles.

TAM created this toolkit to help answer key planning questions related to incorporating EVs into fleets and installing charger infrastructure for public agencies in Marin county. This toolkit identifies the steps needed to install chargers and convert fleets, including available funding from TAM and other agencies. Agencies can use the following information, as well as TAM's online resources, to advance these EV-related projects and to secure internal alignment and communicate effectively with public stakeholders. More information and resources can be found online at [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit).

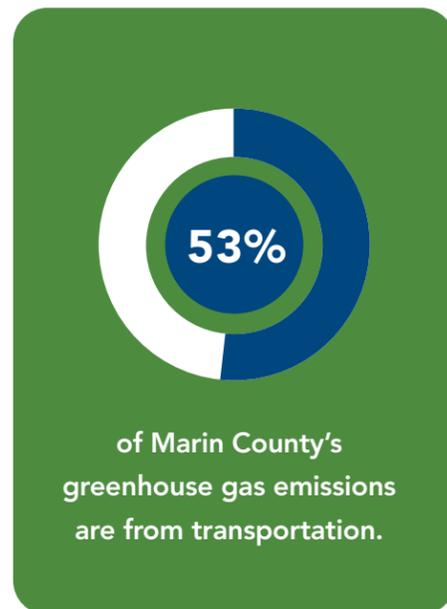
\* TAM rebates and incentives subject to change.



## EV BENEFITS FOR PUBLIC AGENCIES

Public agencies that adopt EVs in their fleet report a decrease in fuel and maintenance costs. While the initial cost of an EV (either an all-electric, hydrogen fuel-cell, or plug-in hybrid vehicle) can be higher than that of a traditional gas or diesel vehicle, agencies can use EV rebates to help offset the difference.

As traditional vehicles age and their maintenance costs increase, agencies can reduce their operating costs by welcoming EVs into their fleet. Fuel costs for electricity are lower and less volatile than costs for gasoline or diesel. Finally, with transportation accounting for more than half (53%) of Marin County's greenhouse gas emissions, according to the Marin Climate and Energy Partnership, putting cleaner vehicles on the road is critical to support local climate action plans as they release far fewer emissions than traditional combustion vehicles.



### EV benefits that agencies should factor into their decision making include:

- Lower maintenance costs
- Lower fuel cost since agencies can charge vehicles during non-peak hours
- Reduced greenhouse gas emissions
- Improving EV range, with increasing numbers of cars that can travel 150+ miles before needing to be charged
- Improved air quality
- Reduced noise pollution
- Communicating agency commitment to sustainability



## REBATES FOR EV FLEETS AND CHARGING STATIONS

One of the biggest considerations for agencies as they transition to electric vehicles and install charging equipment is cost. Agencies can overcome this hurdle by considering the wide range of rebates available for both EV fleet adoption and EV charging equipment. Reviewing these rebates early on in the process can help agencies save time and money. Many rebate programs also provide technical support which can help guide agencies through the entire process.

For EV fleet replacement, many sources of funding are available across a range of EVs including e-bikes, light duty vehicles, and medium to heavy-duty vehicles. These rebates are often stackable, providing additional opportunities to reduce costs for switching to cleaner vehicles. For example, TAM provides a matching rebate to the state Clean Vehicle Rebate Program (CVRP) doubling the state rebate for light duty vehicles. TAM, Bay Area Air Quality Management District (BAAQMD), California Air Resources Board (CARB) and other agencies also provide funding for medium and heavy-duty fleets on a revolving basis. Please contact TAM staff for any questions on available rebates.

*Rebates are often stackable, providing additional opportunities to reduce costs for switching to cleaner vehicles.*

Rebates for EVSEs are even wider, with TAM and MCE providing up to \$6,000 per connector for EVSE installations. These rebates are stackable, and can be additive for individual projects, along with BAAQMD or other regional and state funding sources. Stacking these local funds with regional or state funding can drastically reduce the cost of installations

An example of stacking rebates is as follows, where a larger installation can reduce the overall cost to a jurisdiction:

Example A: Single Charger Pedestal, 2 Heads		Example B: 5 Pedestal, 10 Heads	
Charger Costs (Dual Head)	\$3,500	Charger Costs (5 Dual Head Unities)	\$17,500
Panel Upgrades	\$7,000	Panel Upgrades	\$7,000
Trenching Costs	\$10,000	Trenching Costs	\$20,000
<b>Total Installation Costs</b>	<b>\$20,500</b>	<b>Total Installation Costs</b>	<b>\$44,500</b>
MCE REbate (\$3k/Head)	\$6,000	MCE REbate (\$3k/Head)	\$30,000
BAAQMD Rebates	\$0	BAAQMD Rebates	\$10,000
TAM Rebates	\$6,000	TAM Rebates	\$3,375
<b>Cost to Jurisdiction</b>	<b>\$8,500</b>	<b>Cost to Jurisdiction</b>	<b>\$1,125</b>

TAM also provides additional technical assistance for public agencies as they seek internal agency buy-in and project support. That information can be found online at [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit).

# HOW TO CONVERT YOUR FLEETS WITH EV

Agencies have the option to convert their light duty, medium, and heavy-duty vehicles to a cleaner fleet. As EV and e-bike technology advances, a wide range of EVs are currently available that can travel over 150 miles per charge. Medium and heavy-duty fleet vehicles options are also expanding.

When considering how to convert a fleet with EVs, an agency is encouraged to review their inventory to determine when and where changes can be made to the fleet.

**To determine which vehicles are candidates for an EV replacement, agencies should consider the following:**



**Which vehicles are the oldest?**



**Which have the highest maintenance costs?**



**Which have the highest fuel cost or lowest fuel efficiency?**



**Which travel less than 150 miles a day?**

Agencies can either purchase or lease vehicles when converting a fleet. Oftentimes leasing allows for more flexibility in upfront cost and vehicle upgrades. Agencies should consult their standard practice for procuring vehicles to review all options.

Following are a few steps agencies can review when planning fleet conversions. If an agency requires any assistance, they are encouraged to review both the resources available in this toolkit and online at [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit), as well as contacting TAM staff for more information.

STEP  
**01** 

**Determine Vehicle Fleet Needs**

Review which fleet vehicles can be replaced with EVs. Vehicles prime for replacement are aging vehicles, those that travel less than 150 miles a day, and that have high maintenance and fuel costs. Consult with fleet users to determine which vehicle(s) can be retired.

Tips on reviewing vehicle needs can be found at [afdc.energy.gov/conserve/rightsizing.html](https://afdc.energy.gov/conserve/rightsizing.html).

STEP  
**02** 

**Review Available Rebates for Both Purchase and Lease**

Rebates are available for both purchasing and leasing alternative fuel vehicles. Consider available rebates from TAM, MCE, PG&E, and others that can help fund the addition of EVs to the fleet.

Learn about available rebates TAM. [tam.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit).

STEP  
**03** 

**Select an Eligible EV Replacement**

EVs include all-electric, plug-in hybrids, and hydrogen fuel cells. The CVRP website provides descriptions for each type. Medium and heavy duty EVs can include vans, shuttles, and buses. Filter through medium and heavy duty alternative fuel vehicles on [fundingfindertool.org](https://fundingfindertool.org)

Review and select the light-duty EV(s) for the fleet [cleanvehiclerebate.org/eng/eligible-vehicles](https://cleanvehiclerebate.org/eng/eligible-vehicles).

Review and select medium and heavy-duty EV(s) for the fleet [californiahvip.org/how-to-participate/#Eligible-Vehicle-Catalog](https://californiahvip.org/how-to-participate/#Eligible-Vehicle-Catalog)

STEP  
**04** 

**Reserve Rebates**

See EV fleet rebate information below and reserve a rebate before making a purchase or lease.

Reserving rebates before making a purchase can connect agencies with technical support such as MCE technical assistance and TAM fleet rebate support.

STEP  
**05** 

**Purchase or Lease Vehicle**

Follow existing agency procedure to purchase or lease an EV.

Consult budget admin personnel.

# EV INCENTIVES BASED ON VEHICLE TYPE

*Vehicle incentives for agencies are determined by the vehicle type.*

Public agencies can apply for rebates for new light duty vehicles, used light duty vehicles, electric bikes, and some medium and heavy-duty vehicles (such as a battery electric bus) may be included. Among the incentives available are rebates from MCE, BAAQMD, CVRP, PG&E, TAM, and others.

Agencies seeking funding options are encouraged to reach out to entities such as TAM to begin lining up matching funds that can be used to purchase or lease vehicles. Information about medium and heavy-duty incentives can be found on the California Funder Finder Tool at [funderfinder.org](https://funderfinder.org). Other medium and heavy-duty considerations may also be found at the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP). HVIP is a partnership between the California Air Resources Board and CALSTART.

Incentives Are Available for the Following Vehicle Types*
New Hydrogen Fuel Cell Light-Duty Vehicle
New Battery Electric Vehicle
New Plug-in Hybrid Vehicle
New Zero Emission Motorcycle
Used Light Duty Vehicle (all-electric, plug-in hybrid, hydrogen fuel cell)
Electric Assist Bike
Electric Utility Vehicle
Medium and heavy-duty vehicles**

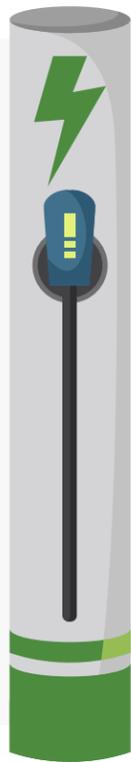
\*TAM Rebates amounts are based on current CVRP rebates and are subject to change. Please contact TAM at [EVRebate@tam.ca.gov](mailto:EVRebate@tam.ca.gov) for current amounts. \*\*Medium and heavy-duty vehicles are considered on a case by case basis by TAM.

TAM developed its fleet rebate program to provide assistance to public agencies that replace traditional internal combustion engine vehicles with electric and plug-in hybrid vehicles. The program is administered on a first-come, first-serve basis as funds are available and prioritizes conversion of existing light duty fleet conversion.

TAM's incentive provides matching funds up to \$5,000 per vehicle. Combining TAM incentives with other available rebates including those offered by the [California Clean Vehicle Rebate Project](#) (CVRP) can reduce the cost of purchasing or leasing an EV by \$10,000 or more. TAM EV incentives are available to all Marin County government entities, including any jurisdictions operating in Marin, school districts, and special districts.

TAM will provide funding for a limit of five (5) vehicles per agency per year, with exceptions made on a case-by-case basis with consultation of TAM staff. Applicants must meet all requirements of the CVRP, including operating the vehicles in California for 36 months.

Agencies are encouraged to apply for additional private, state and regional funding programs as available and applicable. TAM staff will work with project sponsors to promote leveraging of local funding.



# HOW TO APPLY FOR EV FLEET REBATE PROGRAMS

**Agencies have multiple resources available to them for EV fleet rebate programs.** Listed below are some general steps for both TAM's EV fleet rebate program, as well as others including MCE. Marin agencies can reach out to TAM at [EVRebate@tam.ca.gov](mailto:EVRebate@tam.ca.gov) for assistance if they need help with any steps or with finding funding providers. Agencies can find additional resources at [TAM.ca.gov/AgencyToolkit](http://TAM.ca.gov/AgencyToolkit).

General Steps for TAM's EV Fleet Rebate Program	
<b>Step 1</b>	
	<p><b>Objective: Reserve the Rebate</b></p> <p><b>Description:</b> Reserve applicable rebates before purchasing or leasing to be connected with more support from the funding provider.</p> <p><b>Light Duty Vehicles</b> - Reserve the TAM rebate by emailing TAM at <a href="mailto:EVRebate@tam.ca.gov">EVRebate@tam.ca.gov</a> with the quantity, make and model of EV(s), estimated month of purchase, and description of fleet vehicles to be retired. This will reserve your rebate for each vehicle for the calendar year. In the event the vehicle choice is changed, notify TAM as soon as possible. Other rebates to reserve may be found at <a href="http://TAM.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p> <p><b>Medium Heavy-Duty Vehicles</b> - Contact TAM staff to target BAAQMD or HVIP grants.</p> <p><b>Resources:</b> Reserve rebates that match the agency's needs. More rebate information can be found at <a href="http://TAM.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>. Find more medium and heavy duty funding at <a href="http://fundingfindertool.org">fundingfindertool.org</a> or <a href="http://californiahvip.org/how-to-participate/#Eligible-Vehicle-Catalog">californiahvip.org/how-to-participate/#Eligible-Vehicle-Catalog</a>.</p> <p><b>Light Duty Vehicles</b> - Reserve the TAM rebate by emailing TAM at <a href="mailto:EVRebate@tam.ca.gov">EVRebate@tam.ca.gov</a> with the quantity, make and model of EV(s), estimated month of purchase, and description of fleet vehicles to be retired. This will reserve your rebate for each vehicle for the calendar year. In the event the vehicle choice is changed, notify TAM as soon as possible. Other rebates to reserve may be found at <a href="http://TAM.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p> <p><b>Medium Heavy-Duty Vehicles</b> - Contact TAM staff to target BAAQMD or HVIP grants.</p>
<b>Step 2</b>	
	<p><b>Objective: Send Letter of Intent to Rebate Provider</b></p> <p><b>Description: Light Duty</b> - Most rebate providers require a letter of intent that details the agency's plan to convert its fleet. The letter of intent should be signed by an agency's authorized representative and should contain the make and model of each vehicle, the month and year of when it was acquired, and a description of vehicles being retired. This letter states that the agency agrees to meet the requirements of the CVRP which includes applying for the rebate within six (6) months of vehicle purchase and operating the vehicle in California for 36 months. The letter should also include a brief description of the agency's background and experience with EVs.</p> <p><b>Medium and Heavy-Duty</b> - Review requirements for these vehicles on TAM's website.</p> <p><b>Resources:</b> Examples for agencies can be found online at <a href="http://www.tam.ca.gov/projects-programs/alt-fuel-electric-vehicle-program/">www.tam.ca.gov/projects-programs/alt-fuel-electric-vehicle-program/</a> under "documents and reports." More information about medium and heavy duty considerations can be found at <a href="http://www.californiahvip.org/">www.californiahvip.org/</a>.</p>

Step 3	
	<b>Objective: Purchase or Lease EV   Medium - Heavy Duty Retrofit Options</b>
	<b>Description: Light Duty</b> - After the fleet needs have been reviewed and eligible vehicles have been considered, the agency should follow their procurement policies to purchase or lease the electric vehicle, plug-in hybrid, or hydrogen fuel cell.
	<b>Medium and Heavy-Duty</b> - Agencies can work with HVIP and/or TAM staff to complete grant requirements Climate mayors sourcewell tool.
	<b>Resources:</b> Please use your current process to purchase these vehicles, either the state contract purchasing tools or direct contact with dealers. Visit <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> or <a href="https://fundingfindertool.org">fundingfindertool.org</a> .

Step 4	
	<b>Objective: Apply for Rebate with CVRP - only for Light Duty</b>
	<b>Description:</b> Apply for the vehicle rebate with the CVRP online at <a href="https://www.cleanvehiclerebate.org">www.cleanvehiclerebate.org</a> within 3 months of purchase or lease of EV. To apply, an agency must provide a scanned copy of the submitted application signed by the vehicle purchaser, lessee, or authorized representative, along with proof of temporary or permanent vehicle registration for the purchased vehicle. After applying, the agency will be issued a CVRP application number. This CVRP application number is necessary to apply for TAM's rebate. If you have questions about the CVRP Terms and Conditions, contact the Administrator at 1-866-984-2532 or <a href="mailto:cvrp@energycenter.org">cvrp@energycenter.org</a> .

Step 5	
	<b>Objective: Submit Documents to Center for Sustainable Energy - only for Light Duty</b>
	<b>Description:</b> After applying for the CVRP rebate, agencies must send a signed copy of their application, along with a complete copy of the executed and signed vehicle lease or purchase agreement. Mail or digitally upload all supporting documents to the CSE within 14 days of application date, per their instructions at <a href="https://www.cleanvehiclerebate.org/eng/eligibility-guidelines">www.cleanvehiclerebate.org/eng/eligibility-guidelines</a> .

Step 6	
	<b>Objective: Share Documents with TAM or other rebate provider- only for Light Duty</b>
	<b>Description:</b> For TAM rebates, agencies should send a digital copy of all required CSE documents and the CVRP Application Number to TAM at <a href="mailto:EVRebate@tam.ca.gov">EVRebate@tam.ca.gov</a> . Printed submissions are available by mail: EV Rebate, Transportation Authority of Marin 900 5th Avenue, Suite 100 San Rafael, CA 94901.
	<b>Resources:</b> For other rebate requirements visit <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> .

Step 7	
	<b>Objective: Receive TAM Rebate</b>
	<b>Description:</b> After an agency submits all documents to TAM, the TAM EV Fleet Program Manager will review and verify the paperwork. Should TAM need any additional information, the program manager will contact the agency. After TAM validates the documents, the rebate will be processed within 45 days.
	<b>Resources:</b> For other rebate requirements visit <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> .

Step 8	
	<b>Objective: Recover Vehicle Expenses</b>
	<b>Description:</b> After an agency receives the rebate from TAM or another funding partner, they can apply it towards the cost of the vehicle.
	<b>Resources:</b> TAM encourages all agencies to continue to seek out additional EV rebates (see EV Fleet Resources for more info) to further reduce the cost of adding plug-in vehicles to the fleet.

## OTHER EV FLEET RESOURCES

TAM encourages Marin agencies to leverage other regional, state, utilities or private funding sources for adding plug-in vehicles to a fleet. Additional sources include but are not limited to:

Additional Funding and Information Sources
California Clean Vehicle Rebate Project <a href="https://cleanvehiclerebate.org">cleanvehiclerebate.org</a>
California Air Resources Board <a href="https://driveclean.ca.gov">driveclean.ca.gov</a>
Marin Clean Energy EV Rebate <a href="https://mcecleanenergy.org/ev-drivers/#EVrebate">mcecleanenergy.org/ev-drivers/#EVrebate</a>
BAAQMD EV Rebate <a href="https://baaqmd.gov/funding-and-incentives/residents/clean-cars-for-all">baaqmd.gov/funding-and-incentives/residents/clean-cars-for-all</a>
PGE Fleet Program <a href="https://pge.com/en_US/large-business/solar-and-vehicles/clean-vehicles/ev-fleet-program/ev-fleet-program.page">pge.com/en_US/large-business/solar-and-vehicles/clean-vehicles/ev-fleet-program/ev-fleet-program.page</a>
Transportation Authority of Marin <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>

For more information about funding sources and the applicability for agencies, please contact TAM staff for technical assistance. Agencies that require medium and heavy-duty fleet conversions should contact TAM staff for assistance in identifying additional grant opportunities to support those efforts. TAM staff can also put agencies in contact with other technical assistance providers including MCE.

# INSTALL EV CHARGING INFRASTRUCTURE

Electric Vehicle Service Equipment (EVSE) can support both battery-electric vehicles and hybrid-electric vehicles. EVSE delivers electrical energy from the power source to the EV. There are three standard levels of charging an agency can consider. The terms Level 1, Level 2, and Level 3 (Direct Current Fast Charging) are the most common charging levels. The cost of installing this equipment can range from a few hundred dollars to several thousand.

TAM can work with agencies to connect them with resources that will help determine which level of charging is best for their needs and what EVSE funding options are available. It is recommended that after reviewing this toolkit, the agency should evaluate which incentives are available that match their EVSE requirements.

## EV CHARGER TYPES

There are three different levels of chargers available for agencies to use for all-electric and plug-in vehicle charging. Please note that the TAM EV Charging Infrastructure grant program prioritizes supporting Level 2 chargers.

Charger Type	Description
<b>Level 1 (slow)</b> 120 volt	Level 1 is the slowest EV charging source and requires the longest dwell time. A standard 120-volt outlet can be used for this type of charging. No other special charging equipment is required. Provides an average 4 miles of range per hour.
<b>Level 2 (faster)</b> 240 volt	Commonly used for public and at-work charging, a Level 2 charger offers mid to long mileage recovery in a medium dwell time. Special equipment is required. Provides an average of 25 miles of range per hour.
<b>Level 3 (fastest)</b> 500 volts	DC Fast Chargers are only available in public charging stations (not at-home use). Special equipment is required. Provides 80% of range in 30 minutes.

# REBATES FOR CHARGERS

Agencies can stack available funding resources to cut the cost of EV charging equipment down. In addition to rebates from MCE and BAAQMD, TAM provides an EV Charging Infrastructure Grant Program that assists public agencies that install employee-only or publicly accessible electric vehicle charging stations. Funding for chargers are typically available on a first-come, first-served basis until funds are depleted for the year.

Both TAM's EV Charging Infrastructure grant program and MCE's Charge program is focused on level 2 charger installations and providing matching funds for the installation of level 2 chargers. TAM provides matching funds for the installation of Level 1 chargers. BAAQMD Charge program also provides funding for level 2 chargers that meet their program requirements. Agencies that require medium and heavy-duty fleet conversions should contact TAM staff for assistance in identifying additional grant opportunities to support Level 3 (DC Fast Charging) equipment.

TAM works with agencies to streamline the application process to make EV Charging Infrastructure programs easy to use for all agencies such as Marin County's government entities and public districts, including any jurisdiction operating within Marin, school districts, colleges, and universities. Information and how to complete the TAM EV Charging Infrastructure Grant Program are listed later in the toolkit. When combined with other EV Charging Infrastructure programs such as the MCE charging rebate , agencies can save thousands on charging infrastructure.

The TAM EV Charging Infrastructure program grant is based on the number of charging heads being installed or updated. One charging station can include multiple charging heads.

Charging Heads	Available TAM Incentive
<b>Under 10 charging heads</b> (Level 1)	88.5% of complete installation up to \$1,500 (per charging head)
<b>Over 10 charging heads</b> (Level 1)	75% of complete installation up to \$1,500 (per charging head)
<b>Under 10 charging heads</b> (Level 2)	88.5% of complete installation up to \$3,000 (per charging head)
<b>Over 10 charging heads</b> (Level 2)	75% of complete installation up to \$3,000 (per charging head)

*\* Incentive amounts are subject to change. Please contact TAM staff for more information.*

# DETERMINING EV CHARGER NEEDS

TAM provides a step-by-step process for an agency to determine how many EV charging stations are needed and the prime location for each. Once an agency has applied for an MCE rebate, technical assistance is provided to support project development and approval. The same can be said of other agencies who are offering funding incentives. Agencies can find more resources for each step at [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit).

11 Steps for Determining EV Charging Stations Needs	
<b>Step 1</b>	
	<b>Objective: Review Rebate Options</b>
	<b>Description:</b> Review available EVSE rebate options from TAM, MCE, PG&E, and more. HVIP also provides equipment incentives. These rebates can be reserved before any purchase or lease is made. Understanding which rebate options are available will help agencies through the rest of these steps.
	<b>Resources:</b> Reserving rebates early connects agencies with more technical assistance. For more information contact TAM staff or review info online at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>
<b>Step 2</b>	
	<b>Objective: Estimate Demand</b>
	<b>Description:</b> Examine the existing fleet to determine which vehicles currently need access to charging, as well as vehicles that can be earmarked to be replaced by plug-in vehicles in the near future. Review availability of existing charging stations near the agency.  Calculate how many chargers are needed to meet the current demand. Then estimate the number of chargers required to meet the near-future demand. Agencies should communicate with fleet users, employees, and visitors to gauge interest and experience in charging. By pinpointing how many chargers are needed to meet current demand, and how many will be required in the near future, agencies can locate their chargers for maximum growth and use. <i>(Time estimate = 1 month)</i>
	<b>Resources:</b> Need assistance? Contact TAM staff for support. Other rebate providers including MCE can also be contacted to help an agency calculate the demand.

<b>Step 3</b>	
	<b>Objective: Consider Charging Station Options</b>
	<b>Description:</b> Based on estimated vehicle dwell time, determine which speed of EV charging is appropriate (review charger types above or at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> ).  Examine physical siting constraints such as access to electrical infrastructure, ADA access to determine the best location for the charger. Leased facilities should work with the building owner to review charging options and needs. Agencies should review charging stations ownership models (organizationally owned or third-party vendor) and determine if you want to measure charging station use and require payment from non-fleet vehicles. This may lead to other considerations including software requirements, networked vs non-networked capability, and payment options. <i>(Time estimate = 1-2 weeks)</i>
	<b>Resources:</b> Need assistance? Contact TAM staff for support.
<b>Step 4</b>	
	<b>Objective: Reserve Rebates from TAM, MCE and Others</b>
	<b>Description:</b> Even though it is early in the planning process, agencies who reserve EVSE rebates can receive technical assistance that can help make the remaining steps much easier to complete. These rebate amounts can be adjusted as agencies learn more about their needs. In addition to TAM's EVSE and MCE charger rebate EVSE grant, agencies may be able to receive funds from PG&E, BAAQMD Charge! Rebate, and others. <i>(Time estimate = 2 weeks)</i>
	<b>Resources:</b> Learn how to reserve rebates and be connected to technical assistance providers by contacting TAM staff or visiting <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> .
<b>Step 5</b>	
	<b>Objective: Estimate Capital Cost</b>
	<b>Description:</b> Determine the number and type of charging stations required to install onsite. Measure distance from charging station to power point of connection to estimate if additional power is needed.  Request a utility or technology provider to review any electrical service/panel requirements as some service panels may require an upgrade. Ask a technology provider to estimate operations and maintenance costs for the charger types the agency is considering (including electricity use, networking fees). Reduce future capital costs by increasing the installation of make-ready charging spaces to account for growing demand (estimated in step 1). TAM can assist an agency needing information from a utility or technology provider. <i>(Time estimate = 2 weeks)</i>
	<b>Resources:</b> Agencies can work with TAM, MCE and others to help determine their capital cost. By reserving the rebate(s) in the previous step, agencies have access to more technical assistance including MCE providing on-site reviews such as measuring electricity use and inspecting service panels. For more information contact TAM staff <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a> .

Step 6	
	<p><b>Objective: Develop Management Policies</b></p> <p><b>Description:</b> The agency should work internally to develop management policies for charging stations. Tasks include but are not limited to: determining how to measure charging station use and require payment (if applicable) from users; ensure compliance with ADA regulations; contacting their insurance company to discuss potential liability issues; installing signage guiding users of EV charging infrastructure; communicating with agency staff and stakeholders regarding installation and use of stations; and setting a schedule to review charging infrastructure usage over time. <b>(Time estimate = 1-2 months)</b></p> <p><b>Resources:</b> For more information contact TAM staff and review TAM's EVSE onboarding slide deck at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>
Step 7	
	<p><b>Objective: Conduct Site Evaluation with Utility Provider</b></p> <p><b>Description:</b> Contact the agency's utility provider (i.e. PGE or MCE) to conduct a site walk where charging infrastructure will be installed. The utility provider should be able to tell the agency if there are any issues that would prevent them from installing the charger of their choice. <b>(Time estimate = one month)</b></p> <p><b>Resources:</b> For more information contact TAM staff or review info online at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>
Step 8	
	<p><b>Objective: Secure Board/Public Approval</b></p> <p><b>Description:</b> The agency should follow it's standard procedure of obtaining buy-in for their project from either their board or general public. <b>(Time estimate = up to 3 months)</b></p> <p><b>Resources:</b> The TAM EVSE onboarding slide deck includes information for agencies to send plans for their EV charging infrastructure to their approval board and how to make information available to the public. <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>
Step 9	
	<p><b>Objective: Contract with Vendors. Hire Installers (if required).</b></p> <p><b>Description:</b> Review and accept offered equipment and service contracts based on standard agency protocol. This can include bid requests, bid reviews, and public comments. A charging station vendor and installer can be the same company as they are often linked together. TAM does not endorse any particular vendor or installer but can assist agencies should they have questions about next steps. This is also the time to hire installers (if required) to install new EV charger heads or update existing ones. <b>(Time estimate = up to 4 months)</b></p> <p><b>Resources:</b> For more information contact TAM staff or review info online at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>

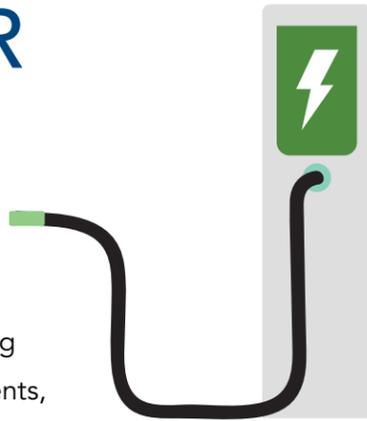
Step 10	
	<p><b>Objective: Finalize Planning and Permitting. Hire Installers</b></p> <p><b>Description:</b> After receiving internal approval, the agency should finalize the management policy and plans for installing/updating chargers. The agency must acquire all necessary permitting before work begins. (Time estimate = up to 2 months) <b>(Time estimate = up to 2 months)</b></p> <p><b>Resources:</b> For more information contact TAM staff or review info online at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>
Step 11	
	<p><b>Objective: Install, Test, and Commission</b></p> <p><b>Description:</b> Once the plan is ready, the agency will install, test and commission the chargers. They should report any issues with chargers to the installing company as needed. <b>(Time estimate = up to 12 months)</b></p> <p><b>Resources:</b> For more information contact TAM staff or review info online at <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>.</p>

## PLANNING AND PERMIT TIPS

Agencies who are installing or upgrading EV charging equipment may run into planning and permitting issues. One thing for agencies to keep in mind is that in the state of California, an EV parking space counts as 2 parking spaces. This means agencies are able to better move forward with their EV charging projects without having to impact a jurisdiction's parking requirements. It's also important to know that typically EV chargers tend to be exempt from local planning review.

Agencies are encouraged to contact TAM staff with any questions or concerns about planning or permitting. This toolkit is not designed to be a replacement for approved codes or standards. Agencies should discuss options with their internal planning team, as well.

# HOW TO APPLY FOR EV CHARGING INFRASTRUCTURE



To apply for an EVSE grant from TAM or another applicable funding partner, agencies need to reserve their grants, confirm commitments, and then begin to purchase and install equipment. If at any time, an agency has questions or needs assistance they are encouraged to contact TAM. Agencies can find more resources for each step at [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit).

Step to Apply for EV Charging Infrastructure Grant	
<b>Step 1: Reserve Grant with TAM or Other Applicable Funding Partner</b>	
After conducting an internal review of charger needs, the agency can reserve their TAM EV Charging Infrastructure grant with an email to <a href="mailto:nnguyen@tam.ca.gov">nnguyen@tam.ca.gov</a> . The email should include the type of chargers to be installed, the quantity of chargers, and the estimated date of installation. Call TAM's EVSE program coordinator, Nicholas Nguyen, at 415-226-0831 for any questions or to confirm the reservation.	
<b>Resources:</b> For MCE, PG&E, and other funding options contact TAM staff and/or review <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>	
<b>Step 2: Confirm Commitment</b>	
Within 30 days of your reservation, confirm your commitment by providing a letter of intent signed by an authorized representative of your agency. This letter should include the quantity of chargers, their specific location, whether or not they are open to the public, insurance coverage, and a brief description of the agency's background and experience with EVs and EVSE implementation. Examples can be found online at <a href="https://www.tam.ca.gov/projects-program/">www.tam.ca.gov/projects-program/</a> under "documents and reports."	
<b>Resources:</b> For more assistance contact TAM staff or visit <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>	
<b>Step 3: Purchase/Install Chargers</b>	
Comply with the program's summary requirements including any local, state or federal requirements, insurance needs, operating and maintaining the charger(s) for at least 3 years, and have authorization to apply for and obtain permits. The agency will then purchase and install chargers by contracting with an applicable vendor or service provider.	
<b>Resources:</b> For more assistance contact TAM staff or visit <a href="https://tam.ca.gov/AgencyToolkit">TAM.ca.gov/AgencyToolkit</a>	

## Step 4: Submit Documents to TAM or Other Funding Partner

Submit supporting documents to show completion, including contract, final costs, digital photographs of installed charger(s), proof of payment, list of other grant assistance, and any changes from the letter of intent. Submit electronically to [nnguyen@tam.ca.gov](mailto:nnguyen@tam.ca.gov), or by U.S. Mail to EV Charger Rebate, Transportation Authority of Marin, 900 5th Avenue, Suite 100, San Rafael, CA 94901.

**Resources:** For more assistance contact TAM staff or visit [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit)

## Step 5: TAM or Other Partner Verifies Rebate

TAM will review all documents submitted by the agency for EV Charging Infrastructure assistance. TAM staff will contact agencies if any necessary information is omitted. Once TAM verifies compliance with all requirements, the agency will be notified and the grant payment will be processed within 45 days.

**Resources:** For more assistance contact TAM staff or visit [TAM.ca.gov/AgencyToolkit](https://tam.ca.gov/AgencyToolkit)

# OTHER EV CHARGING INFRASTRUCTURE FUNDING RESOURCES

As with adding electric vehicles to a fleet, TAM encourages the leveraging of other regional, state, utilities or private funding sources for the installation of EVSE. Additional funding sources are available, and TAM will prioritize the usage of Measure B Funds to leverage other sources, as needed. These fund sources include:

- [MCE Charger Rebate](#)
- [BAAQMD Charge! Rebate](#)
- [PG&E's EV Fleet Charging Rebate](#)
- [HVIP EVSE Incentives](#)
- [Estimate EV Charging Cost](#)

For more information about these fund sources and the applicability for agency charging installation, please contact TAM staff to assist in financial planning to maximize leveraging opportunities.

## Address

900 Fifth Avenue, Suite 100  
San Rafael, CA 94901

## Phone & Web

415-226-0831  
[tam.ca.gov](http://tam.ca.gov)

