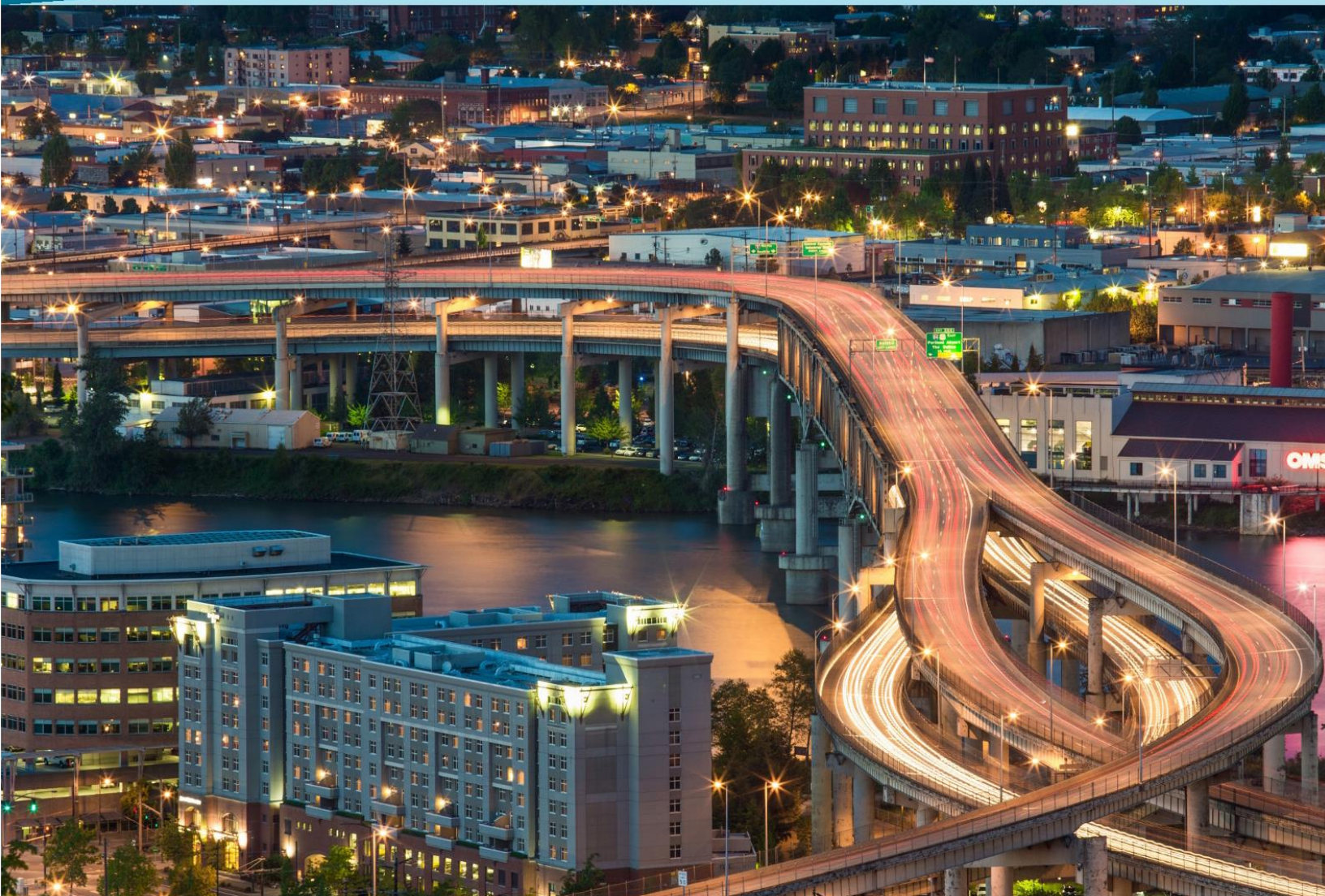


EV Charging and Public/Private Partnerships RFP Template

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Developed by Erin Galiger, Forth
for Bloomberg American Cities Climate Challenge





Author's Note:

RFP Template: EV Charging and Public/Private Partnerships

Expanding public EV charging at low or no cost to local governments

This template is intended to support cities in developing RFPs for EV charging on city property, specifically for projects intended to be at no or low-cost to the city and owned and operated by a partner vendor. By releasing a clear RFP, both cities and EV charging infrastructure deployment partners can understand project goals and have a clear understanding of what is being requested. This RFP template is designed to help cities collaborate with the private sector to expand EV charging infrastructure, and thus intends to provide flexibility and opportunity for vendors to create a strong partnership, while simultaneously pursuing goals in the public interest. By providing important details such as site ownership, payment models, and potential site locations, cities and EV charging infrastructure deployment partners can identify the right match for the project.

This template was developed for the Bloomberg American Cities Climate Challenge. This document was informed by supporting the cities of Denver and San Antonio with the development of similar RFPs. It brings together information gathered from EVSE vendor interviews, common themes in cities developing RFPs, and previously released RFPs from other cities. The template is designed so that cities may cut and paste entire sections of the document into their own RFP document; however, some areas require substantial, detailed input to successfully adapt the language to each city's context. Cities should use their own boilerplate procurement text in addition to the following sections that primarily outline the scope of work for the RFP.

Throughout the development of this RFP, we continuously applied an equity lens. Due to the nature of no-cost infrastructure developments, it can be challenging to request vendors to meet a lengthy list of requirements without making some level of local investment. The rubric is one of the best ways to showcase how a city might evaluate proposals based on their equity priorities.

Note that each section of the template below we've provided a set of instructions to consider as you build and tailor the RFP. Following the instructions, you'll find the template language.

Sincerely,

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Acknowledgments

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TIMELINE

INSTRUCTIONS: Be as transparent as possible when it comes to the timeline associated with the RFP submission and selection. Cities should consider either having an open comment period before releasing an RFP that outlines the key requirements, or releasing an RFI to gauge interest in their market (suggested 60-90 days to comment). This will give EVSE vendors an opportunity to comment on specifications that are overly constrictive and may lead to a lack of responses. After the RFP is released, allow for partners and vendors to submit questions within a two-week period. The deadline for submission of proposals is suggested to be 60 days from when the RFP questions are answered.

Timing of the RFP is also crucial. Access to any local, state, utility, or other funds such as VW settlement funds may make or break an opportunity to enable a vendor to install EV charging infrastructure with a business model that enables low or no cost to the city. RFPs should be timed before those funding periods open so that when they become available, the respondents can take advantage, or can collaborate with the city if the city must be the applicant.

PROPOSAL EVALUATION PROCESS TIMELINE

TASK:	DATE/TIME:
• RFP released for comment period	<Insert date>
• Deadline for RFP comments	<Insert date>
• RFP released	<Insert date>
• Deadline for submitting questions	<Insert date>
• Answers to all questions submitted	<Insert date>
• Deadline for submission of proposals	<Insert date>
• Evaluation period	<Insert date>
• Selection of vendor	<Insert date>

NOTE: These dates represent a tentative schedule of events. <Insert Jurisdiction> reserves the right to modify these dates at any time, with appropriate notice to prospective vendors.

PROGRAM BACKGROUND, GOALS, AND DESCRIPTION

INSTRUCTIONS: This section introduces the city and its relevant goals, and will segue into the scope, specifics, and duration of the envisioned program, and key points of contact in subsequent sections. It may also identify the source(s) of funds for the program. The program description should include details on the initiator of the RFP, the history, predecessors, or origins of the program, and goals of the program. Cities should be upfront about what their role will be financially, how they intend to partner, required contract terms if any (e.g. non appropriations clauses, prevailing wage requirements, easement restrictions or maximum contract terms) and ownership of installed equipment. If the city is unable to provide funding, it's important to bear in mind the nascent nature of the EV charging business, and take steps to support vendors in creating a sustainable business model, such as leading partnership development and stakeholder engagement, seeking out grant funds, reducing costs through streamlined permitting, etc. The city is typically responsible for all site maintenance (ex: garbage and debris pickup, snow removal).

Potential roles of the city include:

- Funding all or part of the charging infrastructure; could include electrical infrastructure, hardware, network, installation costs and materials*
- Pre-vetting of city-owned sites by city and/or utility*
- Being a landlord and site owner (willing to provide easements on City property)*
- Enforcing proper use of EV charging equipment and EV parking*
- Streamlining funding opportunities and lead on grant applications (VW settlement, state, or utility)*
- Utilizing and promoting public charging infrastructure for city fleets*
- Streamlining permitting practices*
- Making available accurate and timely data on EV registrations by zip code, if applicable*
- Promoting EVSE and educating residents on the importance of transition to electric mobility*
- Leading stakeholder consortia with electric utilities, installers, land and site owners, to help minimize costs and capital risk for EVSE providers by enabling them to build a local network and deploy more easily at non-City owned sites (e.g. via a standard site host agreement)*
- Providing incentives to employers to create Green Jobs in the EV charging infrastructure segment*
- Maintenance of parking spaces (e.g. paving, street sweeping, snow removal)*
- Pass through of low carbon fuel credits (California)*

BACKGROUND

<Insert Jurisdiction> is requesting proposals to increase the amount of public charging infrastructure. Promoting EV adoption is important to <Insert Jurisdiction>.

<Insert Jurisdiction> has set the target for reduction in greenhouse gas (GHG) emissions <insert any specific details about plans, goals, etc>. The plan includes goals, targets, and strategies needed to reduce emissions associated with transportation. The plan sets ambitious goals to accelerate the adoption of light-duty electric vehicles (EVs), which have been shown to significantly reduce GHG emissions compared to gasoline vehicles, including: <insert KPIs or milestone marks to measure progress>.

Meeting these ambitious targets will require a significant increase in EV adoption rates in the City. In 2020, the City adopted <previous initiatives to address GHG emission or overall goal>. The City also has plans to have a 100% electric fleet by <X Date>.

This RFP seeks to implement this action by developing a partnership to leverage City properties and/or rights of way to expand EV charging access citywide. The City is increasing the number of EVs in its fleet and may consider utilizing these chargers as part of their fleet electrification plan.

<Insert Jurisdiction> is requesting proposals for sustainable business models and partnership opportunities with third-party electric vehicle supply equipment (EVSE) providers who will install, operate, maintain, and own publicly accessible electric vehicle (EV) charging infrastructure on City property at <low or no> cost to the city. Sites may include off-street public parking lots and garages, off-street parking at city facilities such as public parks, community centers and libraries; and curbside parking spaces. <Insert Jurisdiction> is proposing specific sites for respondents to evaluate and propose options; however, respondents may suggest additional sites on City-owned property for consideration.

<Insert Jurisdiction> will be responsible for <insert applicable bullets from the provided list above with relevant details around timing this would take place>.

PROJECT SCOPE

INSTRUCTIONS: *When a city does not intend to own or invest in infrastructure, project scope should be written as guidelines rather than requirements. Those making the investment of infrastructure should have some degree of site choice and configuration; for third party owned and operated infrastructure, the EVSE provider will want to make decisions around which sites, technology, and configuration would provide the optimal return on their investment. Many contract terms that may seem appropriate or standard to your in-house counsel from “similar” construction contracts may not be appropriate when the equipment ultimately will not be owned by the jurisdiction; e.g. requirements to post a completion bond or otherwise financially guarantee delivery of equipment.*

The sample scope below is flexible, based on what the city is able to offer and willing to allow. For example, cities may be able to offer installing signage and reconfiguration of the parking stalls, which can help reduce costs to the vendors. In addition, cities may want to enable vendors to recover their costs through additional revenue streams, such as station sponsorship, advertising, or dwell time fees, if allowed by city policy.

EVSE Vendors have shared the desire for contract terms to be 7 years at the very least, 10-20 years being ideal. If those longer terms are unavailable, an ability to extend the contract in longer increments is desired. Many Level 2 sites don’t break even until 5-7 years; short term leases decrease the ability for a vendor to get a return on their investment. Some vendors will request liquidated damages if a lease is terminated early, so that their investment in “in the ground” infrastructure is not in danger.

It’s suggested to refrain from statements that will limit the number of bids and flexibility, such as “own all the L2 and DCFC in the city” or “you must bid all sites for one price.”

SAMPLE SCOPE

<Insert Jurisdiction> is seeking proposals from firms or organizations to provide the following services:

1. System design and planning for turnkey solution for EV charging stations (Level 2 or DC fast charging) including all necessary related infrastructure;
2. Furnish, install, and own publicly accessible EV charging stations and any necessary related infrastructure on City-owned property. This includes:
 1. Cover all costs associated with installation, maintenance and electricity for the EVSE.
 2. The electrical infrastructure will ultimately be owned by the city while the charging infrastructure will be owned by the EVSE vendor.
 3. The vendor may establish a service charge and method of payment collection to recoup these costs as well as any operating profit from EVSE users. The vendor may also pursue additional revenue streams to cover its costs, including station sponsorship, advertising, dwell time fees, or others to be evaluated by the city.
 4. Provide proper EV parking signage and reconfiguration of any parking stalls for EV parking.

5. Comply with all permitting, Americans with Disabilities Act (ADA), and parking requirements
3. Oversee operations, maintenance, and customer services for the charging stations, all through a turnkey solution as described herein. It's the city's preference that this will include:
 - a. 10-year contract term, with option to extend
 - b. Hardware uptime and availability requirements of 97%+ annually
 - c. Tier 1 and Tier 2 customer service and maintenance including an 800-number for drivers
 - d. Conformance to Open Charge Point Protocol (OCPP) v1.6 or later
 - e. Share data either continuously or at regular intervals (at least quarterly) with the city, including usage statistics and demographic data
 - f. Open to member and non-member EV drivers
 - g. It's envisioned that the pricing structure will be set by the EVSE provider, and that the pricing structure may be changed over the course of the project. It's the city's preference that the pricing remain less than the equivalent cost to fuel a gasoline vehicle and within 20% of the typical market charging prices in the area. It's also the city's preference that the vendor provide notification and an opportunity for comment 30 days in advance of any pricing change.
 - h. Location-based exclusivity to EVSE vendors for the Term of the Agreement
 - i. Options for EVSE when the agreement expires (e.g., charging unit removal, transfer of ownership, contract renewal options)

As a result of this RFP, <Insert Jurisdiction> intends to enter into at least one agreement for deployment of EVSE on city-owned property. Depending on responses, the City may elect to enter into multiple contracts for multiple vendors. The City's goal is to cumulatively provide a total of <30> chargers across approximately <10> sites over the course of Phase 1.

Phase 1:

- Successful permitting, construction, and operation of <30> Level 2 and DCFC chargers through a rapid deployment, at no direct cost to the City.
- Evaluation of Phase 1 performance and development of an approach for an expanded Phase 2. Information on usage will need to be provided to the City to help evaluate the pilot technologies and locations.

Phase 2:

- Dependent on achievement of City objectives and successful deployment in Phase 1, Proposals should provide recommended expand into a scaled program for Phase 2. Vendor must meet the 97% uptime and availability requirements in order to qualify.

DESIGN GUIDELINES

INSTRUCTIONS: Consider whether the specifications are design guidelines or requirements. If written as requirements, they may limit the type and number of responses. Whoever is funding the installation of infrastructure should be able to make final decisions on hardware. Cities can use the weighted rubric to communicate desires vs. requirements. Consider environmental criteria that may be an important factor for your location; such as operating altitude and temperature range.

<Insert Jurisdiction> is interested in EV charging stations that fit within the following <guidelines/requirements>. Any deviations from <guidelines/requirements> shall be described in the proposal response to be considered:

- Hardware Selection
 - Level 2 or DCFC types of stations
 - Equipment must be listed by an approved product listing agency, rated for outdoor use, and installed in accordance with the manufacturer's specifications
 - All DC Fast Charging EVSE must provide at least one SAE J1772 DC Combined Charging System Type 1 compliant connection per site and at least one CHAdeMO compliant connection per site or description for why choosing to omit.
 - All Level 2 EVSE must provide at least one SAE J1772 connection
 - Cable retraction system
 - Operating temperature range of <-30 deg C to +50 deg C>
 - Operating altitude of <1000m>
 - 5 year hardware warranty
 - Demand response support¹
 - Cloud connected, smart charging station
- Key system integrations or customizations
 - PCI Compliance
 - Multiple access methods and payment mechanisms (mobile app, payment card and RFID for fleets etc.)
 - Roaming/interoperability availability with other networks prominent in <Insert Jurisdiction>

<Jurisdiction can add any additional considerations here. For example, if city offers/restricts use of advertisements on or around EVSE.>

¹ If a utility is partnering in this program, they may offer funds contingent on demand response support.

SITES FOR CONSIDERATION

INSTRUCTIONS: *For cities that have a few pre-selected sites, they may offer guidelines around location and design the evaluation criteria to advance certain locations and/or highlight equity considerations. Cities, in this case, have the role as an information provider about the publicly-owned spaces available. Provide as much information as possible, as vendors are more likely to choose sites that have lower cost of installation and higher expected utilization. Potential sites should include the following pieces of information:*

- *Physical address, site type (off-street lot vs. curbside space), facility type (e.g. rec center, library, etc.), number of spaces available, reasoning behind the location selection.*
- *Ideally also include:*
 - *Specifics about the location such as walkability score, what types of drivers already use those spaces (typical dwell time), surrounding amenities, location of nearby multi-family housing, and utilization rates (and cost of use) of nearby chargers.*
 - *Whether the site is within an Environmental Justice community or has an equity score provided by the City. EPA’s EJScreen is a tool often used to support this mapping exercise.*
 - *If possible, include utility information about pre-vetted spaces such as: nearest primary feeder / interconnection point, headroom on an existing transformer, determine what that headroom is and voltage level (480 or 208V), and physical room inside the transformer or vault (photograph).*
 - *Vendor access to sites; license agreement or lease.*

While requiring that bidders bid for the full suite of sites available to a City may limit responses, a more flexible response that still addresses equity might be to designate a ratio of “highly commercial” sites to “equity focused” sites which each bidder must complete.

<Insert Jurisdiction> is proposing specific sites for respondents to evaluate and propose options; however, respondents may suggest additional sites on City-owned property for consideration. A list of potential EVSE Sites is included below, and will be further vetted after the contract is awarded.

<Insert number> of city facilities, including libraries, recreation centers, and city parks, have been identified across the City that have at least 2 available parking spaces per site. A list of these sites can be found in the Appendix, and an online map can be found at <insert hyperlink>. Proposers should include a prioritized list of at least their top <10> sites they would propose for a first phase of implementation, at which their proposed service delivery model can work. The City has a preference that at least <4> of the proposed sites be in <environmental justice neighborhoods> to increase access to charging throughout the city. Proposers may recommend other City-owned sites to form a part of the public EV charging network in addition to the list provided.

Site finalization and selection will occur in partnership with the selected Developer and the City. Sites are anticipated to have at least two Level 2 or DC fast charging ports per site. There is no explicit maximum number of stations per site as the number of stations will be site dependent and vary according to parking lot size and capacity.

<Insert table of sites and link to webmap if available>

PLANNING BUDGET

INSTRUCTIONS: *City should be clear in respect to their expectations in a low/no-cost proposal of these expectations as well as how the budget will be evaluated. Cities can also advise on sources of revenue that are allowable, such as advertising revenue, sponsorship, and cost of charging.*

This RFP solicits services at <low/no cost> to <Insert Jurisdiction>. Proposals should include an estimated project budget to allow the City to evaluate the cost-effectiveness and long-term financial viability of proposed services. Projects with self-sustaining business models are highly preferred for this pilot. Beyond the contribution of sites that the city is willing to dedicate for EVSE infrastructure, the proposal budget should also demonstrate how the project is cost-neutral to <Insert Jurisdiction>.

Revenue may be collected from the use of the charging stations through advertising revenue, sponsorship, and charging for use of energy. The city has a preference that the cost to charge not be more than the equivalent cost to fuel a gasoline vehicle, and that it be competitive with comparable services in the region (excluding free-of-charge EV chargers).

In a separate electronic file, provide an itemized planning-level budget, including a breakdown of anticipated costs and revenues for the project. The intent of this budget is to allow for City evaluation of cost-benefit of the various types of EV charging technologies and site configurations. The budget shall be used for evaluation purposes, but is understood to be an anticipated, conceptual budget prior to confirmation of site-specific considerations and cost factors.

EV CHARGING INFRASTRUCTURE PROVIDER PROFILE

INSTRUCTIONS: *In this section, cities should consider specific requirements and information needed from vendors for contracting. It is recommended that this section be updated to include all local vendor contracting requirements.*

Background & Work Experience:

- A list of all communities within the <geographical area> in which the provider has provided and maintained publicly available EVSE during the last three years, if applicable. Please list communities with active EVSE and communities where EVSE have been removed. Also include the following information for each community:
 - Name of the organization that contracted with you for EVSE sites. Please include the name of a contact person and phone number.
 - Was the contract/franchise exclusive or nonexclusive?
 - Number of EVSE provided.
 - Time period that the EVSE were installed.
 - Reporting sales & usage (sample reports).
- A list with additional communities in the United States in which the provider has provided and maintained publicly available EVSE during the last five years, if applicable. Include all of the information identified in the previous bullet.
- A list of the vendor's three most recent projects with a short description of the scope of work.
- Please list any public agencies that have chosen to cancel or not renew EVSE contracts with your firm during the last five years.
- List organizations, contact names, and phone numbers of persons providing the reference

Subcontractors

- If available, identify subcontractors and the specific requirements of this RFP for which each proposed subcontractor will perform services.

MBE/WBE PARTICIPATION

INSTRUCTIONS: *A city or state may have existing ordinances mandating Minority and Women's Business Enterprises' participation in procurement. It is recommended to use existing boilerplate language from your city to address this section, though may need to be adapted given this isn't a typical contract utilizing city funds. It may be sufficient simply to indicate a preference for MWBE contractors to be part of the team, and/or EVITP-certified contractors.*

<Insert Jurisdiction> has approved new rules governing the certification and compliance of women and minority owned business for participation in the City's <Minority and Women Business Enterprise Program (MBE/WBE Program)>. Through the MBE/WBE Program, the City has established certain policies for the utilization of minority and women businesses in its purchasing and contracting practices. <Insert Jurisdiction> actively seeks Minority and Women business enterprises (MBE and WBE) participation for contracts and purchases associated with programs on City property.

The goal for Minority Business Enterprise (MBE) participation is <10%> of the total program value.

The goal for Women's Business Enterprise (WBE) participation is <10%> of the total program value.

The goal for combined MBE/WBE participation is <20%> of the total program value. This goal is based on the original agreement amount and remains in effect throughout the term of the agreement.

PROPOSAL EVALUATION & AWARD RUBRIC

INSTRUCTIONS: *The proposal evaluation and award rubric should be customized to the city's priorities and provided upfront to bidders. City RFPs can be designed with a "grading rubric" so that multiple vendors may be awarded based on their responses and sites they've selected to pursue. Consider creating a scoring criterion that may include assignment of points/ percentages and/or weighting each criterion listed below. Examples of criteria include:*

- *Current and past vendor performance in similar contracts with other agencies.*
 - *Financial stability of the proposer as reflected in a certified financial statement or other certified statement.*
 - *Proposed customer rate structure and method of customer payment that will be used to charge customers.*
 - *Other public benefits (i.e., in terms of affordability and customer support)*
 - *Strength, quality, durability, advanced technology, future flexibility and aesthetic appeal of proposed EVSE.*
 - *Proposed maintenance, repair and replacement schedule including response times for malfunctioning EVSE (e.g., vendor's proximity to the <Insert Jurisdiction> and number of proposer's employees performing maintenance functions).*
 - *Possible commitment to providing additional EVSE at other parking facilities owned by <Insert Jurisdiction> (desirable but not required).*
 - *Vendor's specific marketing strategy that includes product advertising.*
 - *EVSE installation marketing plan.*
 - *Description of the vendor's available marketing resources.*
 - *Proposed options for EVSE (e.g., system removal, transfer of ownership, contract renewal options) when the agreement expires and potential costs to the jurisdiction.*
-

A 100-point scale will be used to evaluate eligible proposal applications. Scores will be used to develop final recommendations. Proposal applications will be evaluated and ranked according to the following criteria:

Criteria	Points available
<p>Financial viability: Cost effectiveness is based on applicant provided budget and revenue information</p> <ul style="list-style-type: none"> Financial stability of the proposer as reflected in a certified financial statement or other certified statement Viability of proposed business model, as reflected in the submitted planning level budget detailing anticipated CAPEX, OPEX, and revenues 	15
<p>Number of proposed sites and chargers per site. A shown interest and proven ability to scale.</p>	20
<p>Environmental Justice Sites: The City prioritizes Environmental Justice sites for charging infrastructure. A shown interest in developing infrastructure in communities considered environmental justice sites. <Insert city values or commitments around equity></p>	15
<p>Conformance to Technical Preferences</p> <ul style="list-style-type: none"> Hardware Requests - Strength, quality, durability, advanced technology, future flexibility and aesthetic appeal of proposed EVSE Software Requests - Interoperability and future-proof technology of EVSE Operations and Maintenance - Proposed maintenance, repair and replacement schedule including response times for malfunctioning EVSE (e.g., vendor's proximity to the <Insert Jurisdiction> and number of proposer's employees performing maintenance functions) 	15
<p>User Experience, Accessibility, and Payment Mechanisms</p> <ul style="list-style-type: none"> Conformance to city preference of proposed EV customer rate structure and methods of customer payment used to charge customers Maximum public benefit; defined as highest uptime, most affordable, and customer responsiveness 	10
<p>Proposed options for EVSE when the agreement expires and potential costs to the jurisdiction</p> <ul style="list-style-type: none"> System removal, transfer of ownership, contract renewal options 	5
<p>Project Team Experience and Qualifications</p> <ul style="list-style-type: none"> MBE/WBE vendors and subcontractors Current and past vendor performance in customer service, commercial acumen, public service Schedule, Workplan 	20
<p>Total</p>	<p>100</p>

PROPOSAL RESPONSE

INSTRUCTIONS: *It is important to make your expectations clear to bidders on how to respond to the above criteria. As this is a proposal, allow for online bidding and eliminate the need for notarized documents. Forth has a compiled list of EVSE networks and vendors, if interested for distribution.*

Your proposal must specifically address each of the questions/issues that are listed below. The quality and detail of your responses will figure significantly in the overall evaluation of your proposal. Bidders are encouraged to give examples and provide additional information to support your compliance on each point.

The proposal section should provide the following sections:

1. **Project Understanding and Approach:** Please describe your understanding of the objectives, purpose, and scope of this project, and your approach to completing the project successfully. Please include a description of your proposed business model, including proposed revenue sources, cost reduction strategies, and capital sources to finance the project.
2. **Proposed Equipment and Services:** A written and pictorial description of the proposed EVSE design including:
 - a. Hardware, software, and network specifications; including whether they meet project scope and design guidelines
 - b. Delivery and proposed installation schedule
 - c. The submission of more than one type of charging station is permitted, however, if the selection of any particular design would result in a change to the proposed rate structure and method of collection, those changes must be noted.
 - d. Description of the proposed EVSE maintenance program including the location of maintenance facilities, number of staff that will be available for maintenance and anticipated response times.
 - e. Options for EVSE when the agreement expires (e.g., charging unit removal, transfer of ownership, contract renewal options) and responsible party for any costs incurred (if applicable). It is highly preferred that the vendor cover any removal costs.
3. **Proposed Sites and Number of Stations**
 - a. Summary of the proposed number of sites, proposed site design, and site configuration to be used for installations for Phases 1 and 2. This should include the number of chargers per site, whether they are single or dual chargers.
 - b. Description of site scalability to increase number of chargers in later phases.
4. **Estimated Program Budget and Revenue**
 - a. Proposed EVSE end-consumer rate structure (e.g., charging customers per kWh usage or plug time) and customer method of payment (e.g., credit card reader for universal usage or restricted access for only network users).

- b. Fill out tables in the budget section estimating project budget and revenue to allow the city to evaluate the cost-effectiveness and long-term financial viability of proposed services.

5. Team Information, Experience, and Qualifications

- a. Fill out provider profile and subcontractor profile
- b. Description of ability and staff expertise to provide services including customer service, site evaluation, installation, monitoring, maintenance, and marketing of EVSE. Include marketing plan details and available resources.
- c. Identify MBE/WBE Participation