



Clean Fuels Backstop Aggregator 2019 Workplan

Over the first three months of our role as Backstop Aggregator, the Forth Mobility Fund has spent time deepening existing relationships and fostering new ones with utilities throughout Oregon. We have been listening to the interests and needs of our utility partners for accelerating transportation electrification among their customers and have created this workplan for 2019 to reflect those needs.

We have also established administrative procedures to set us up for success in 2019. We have monetized all of the credits awarded to us at the execution of our contract, yielding over \$780,000 in revenue. The revenue that funds the 2019 workplan is from the sale of credits generated in 2016 and 2017 from the following utilities: Ashland Electric Services, Blachly-Lane, Canby Utility Board, Central Electric Co-op, City of Bandon, Clearwater Power Company, Columbia Basin Electric Co-op, Columbia Power Co-op Association, Columbia Rural, Consumers Power, Coos-Curry Electric Co-op, Douglas Electric Co-op, City of Forest Grove, Harney Electric Co-op, Hood River Electric Co-op, Idaho Power, Midstate Electric Co-op, Milton-Freewater Light & Power, Monmouth Power & Light, Oregon Trail Electric Co-op, Salem Electric, Surprise Valley Electric Co-op, Wasco Electric Co-op, and West Oregon Electric Co-op. We intend to put these funds to work quickly to accelerate transportation electrification, and project we will spend all of these funds on this workplan by the end of 2019. We will monetize our next allotment of credits throughout 2019, and plan to apply those resources to work in 2020, or in late 2019 if necessary.

We will submit a more detailed report on activities to date by March 31, 2019, as required by our contract.

Focused Local Programs (Estimated Spending \$330,000)

Contract Requirements

The Contractor shall create focused local programs in areas where a higher number of electric vehicles are registered. Specifically, where the sale of credits results in at least \$20,000 in annual revenue from a single utility service territory, the Contractor shall dedicate at least 50% of the total annual revenue from the sale of credits from that service territory on this task. The Contractor may also choose to develop focused programs in other regions, particularly where it is serving as Backstop Aggregator for several nearby utilities or there are strong regional electric vehicle markets.

2019 Plan

For utilities that have a significant number of vehicles registered, and thus generate a substantial amount of credit revenues, we will dedicate some of those revenues to targeted programs within that region. These focused local programs will be designed in consultation with the local utility and other partners and will evolve to reflect best practices and research findings about effectiveness over time. For the focused local programs, the utilities that generated more than \$20,000 in revenue (based on the sale of 2016-2017 credits) are: Central Electric Co-op,



Consumers Power, Coos-Curry Electric Co-op, and West Oregon Electric Co-op. Forth will also be receiving a significant number of credits from Ashland Electric Services, aggregated from 2018. In preparation for this and given the potential for promoting electric transportation in the Rogue Valley, we have elected to devote a portion of revenue for focused local programs in Southern Oregon. A number of these programming items will be incorporated on a rolling basis; however, we expect they will include the following elements:

- Local electric car “ride and drive” events in the utility service territory
- Targeted local marketing campaigns using traditional and social media
- Targeted outreach to local employers to encourage provision of workplace charging
- Targeted engagement and training for regional fleet managers
- As needed, identifying and collaborating with community organizations, in partnership with local utilities
- Regional “group buy” programs that offer special pricing to local buyers of electric vehicles for a limited time
- Focused outreach incorporating Chargeway to engage with consumers about charging
- At least one targeted demonstration project to provide electric mobility options for traditionally underserved communities

In addition to Focused Local Programs, as described above, we will also be using revenue from aggregated credits to deliver statewide consumer engagement and utility-focused engagement across Oregon.

Statewide Consumer Engagement (Estimated spending \$235,000)

Contract Requirements

- Conduct marketing awareness campaigns using traditional and social media.
- Organize and coordinate electric vehicle ride and drive events.
- Provide on-line materials that shall be made available on <https://forthmobility.org> and <https://goelectricoregon.gov>.
- Perform outreach to employers to encourage investment in workplace charging for their employees.

2019 Plan

- Deliver electric vehicle outreach & education throughout Oregon, via stand-alone and mobile Go Forth Electric Showcase (Estimated 40 hours/week, 50 weeks/year)
- Increase and Amplify Workplace charging outreach
 - Webinars at least quarterly
 - Presentations to key employer groups (x4)
 - Promotion of utility and other programs
- Website updates (Forth + GoElectricOregon)
 - New resources, including list of services



- Statewide utility offerings/programs
- Increase awareness of electric vehicles via social and traditional marketing channels
- Conduct at least 8 Ride and Drive events across state
- Major presence at the Portland International Auto Show
- Assist with regional dealer engagement and host at least two dealership trainings

Utility Engagement (Estimated Spending \$120,000)

Contract Requirements

- Contact each utility for which they serve as the Backstop Aggregator to better understand the utility's needs and goals regarding electric vehicles and encourage greater participation in promoting electric vehicles.
- Provide each utility, upon its request, with a transportation electrification strategy, a model website, or other educational materials.
- Convene and host a workgroup where utilities can: discuss the benefits and challenges of increasing electric vehicle adoption and share ideas about potential incentives they can provide to their customers.

2019 Plan

- Continue to build relationships with all utilities for which we are serving in an aggregation role; complete transportation electrification plans as desired by the utilities
- Consulting on CFP for 'opted-in' utilities, including promoting transportation equity work
- Develop "membership services" package for all Oregon utilities, including exclusive access to photos, collateral, Ride and Drive toolkit, discounted Roadmap Conference registration (waived for aggregated utilities), etc.
- Provide a one day "EV 101" workshop for utility staff in conjunction with Roadmap Conference to provide information on utility program development, charging basics, incorporating equity, and outreach strategies
- Provide a one day "EV 201" workshop for utility staff focused on smart and managed charging
- Develop new and improved resources
 - DC Fast Charging 101
 - Workplace Charging How-To
 - Recommended Installers List
 - Level 2 Charging Best Practices
- Work with utilities to coordinate regional group buys and/or dealership incentive program (x2)
- Connect utilities to dealerships via Chargeway, including promotion at Roadmap Conference
- Resource development: co-branded collateral, revenue and demand-side growth benefits
- Convene quarterly utility work group webinar series



- Partnering with non-opted-in utilities to accelerate transportation electrification

The work plan listed below includes activities and programs to be carried out by the Forth Mobility Fund and contractors through December 31, 2019. This workplan is reflective of anticipated work to be done but is not intended to be all-inclusive. Unanticipated work may supplement this list and some tasks may be modified to accommodate unforeseen situations.

| TASK | SUBTASK | RESPONSIBILITY | DUE DATE | LOCATION |
|--|--|--------------------------------|----------------------|---|
| Backstop Aggregator Role Administration (10% at most) | Workplan approved by DEQ | Forth/DEQ | January 2019 | N/A |
| | Submit Annual Report (2018) | Forth/DEQ | March 31, 2019 | N/A |
| | Monetize credits, market value | Forth/CleanFuture | Ongoing | N/A |
| | Prepare workplan for 2020 | Forth | December 31, 2019 | N/A |
| Deliver consumer electric vehicle outreach & education statewide | Stand-alone and mobile Go Forth Electric Showcase | Forth | Ongoing | Statewide |
| | Deliver at least 8 Ride and Drive events | Forth | Q4 2019 | Statewide- exact locations TBD |
| | Design and implement focused workplace charging outreach and education | Forth | Ongoing | Statewide |
| Focused Local Programs | Renew work agreement for Central Oregon CBO (Environmental Center) | Forth/Environmental Center | Q2 2019 | N/A |
| | Deliver at least 3 Ride and Drive Events in Central Oregon | Forth/ Environmental Center | Q4 2019 | Central Oregon (Central Oregon Coop., |



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|--------------------|--|--------------------------------------|------------|---|
| | | | | Midstate Electric Coop.) |
| | Ride and Drive at Mt. Bachelor to demonstrate EV performance in snow | Forth/Environmental Center | April 2019 | Mt. Bachelor |
| | Seek/offer at least one vehicle "group buy" in Central Oregon | Forth/ Environmental Center/ Dealers | Q4 2019 | Central Oregon |
| | Targeted outreach to Willamette Valley, between Portland and Eugene | Forth | Q4 2019 | Consumers Power territory, Forest Grove territory |
| | Targeted outreach in Southern Oregon (Near City of Ashland and Coos-Curry territories) | Forth | Q4 2019 | Southern Oregon |
| | Scoping and launching of transportation equity project in rural community | Forth, Community Partners | Q4 2019 | Southern or Central Oregon |
| | Focused outreach incorporating Chargeway beacons to engage with consumers about charging | Forth, Chargeway, Dealerships | Q4 2019 | Statewide |
| Utility Engagement | Provide membership services package to all Oregon Utilities | Forth | Q2 2019 | Statewide |



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|--|--|---------------------------|--------------------------|---|
| | Partner with non-opted-in utilities to accelerate transportation electrification | Forth | Ongoing | Statewide |
| | "EV 101" Workshop for utility staff | Forth, industry partners | June 2019 | Roadmap Conference (Portland) |
| | "EV 201" Workshop for utility staff | Forth, industry partners | Q4 2019 | Portland |
| | Webinars for Utility Working Group | Forth | Quarterly, Q1: March 5th | N/A |
| | Consulting on Clean Fuels programming to opted-in utilities | Forth | Ongoing | Statewide |
| | Coordinate at least two group buys or dealership incentive programs | Forth/Utilities | Q4 2019 | Statewide |
| | Promote dealer/utility engagement, with support from Chargeway | Forth/Utilities/Chargeway | Ongoing | Statewide, Pilot in Portland beginning 1/2019 |
| | Transportation Electrification Plan Consulting | Forth | Ongoing | Statewide |
| | Printed/Co-branded collateral for partners | Forth | Ongoing | N/A |
| Assist with regional dealer engagement and host dealership trainings | | Forth | Ongoing | Statewide |



Estimated budget through December 31, 2019

| Expense Category | Expense |
|--|-------------------|
| Personnel | \$ 325,000 |
| Contract Services | \$ 170,000 |
| Travel & Meals | \$ 15,000 |
| Event Expense | \$ 4,000 |
| Occupancy & Telecommunications | \$ 15,000 |
| Supplies & Materials | \$ 16,000 |
| Equipment Lease & Maintenance | \$ 10,000 |
| Insurance (Included in Indirect) | \$ 0 |
| Total Direct Expenses | \$ 555,000 |
| Indirect/Overhead Expenses | \$ 140,000 |
| Administrative Expenses (Capped at 10%) | \$ 65,000 |
| Total Expenses (with Indirect Overhead) | \$ 750,000 |