



Forth Mobility Fund entered into a contract with Oregon Department of Environmental Quality in August 2018. This report summarizes the activities carried out by Forth Mobility Fund and any approved subcontractors from August 22, 2018 through December 31, 2018. That work is based on a workplan developed based on the aggregation 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.

## **1. Monetization of Credits**

For credits generated during 2016 and 2017, Forth Mobility Fund received 7,223 credits as the Backstop Aggregator. These credits were monetized through a subcontractor, CleanFuture, on two occasions. The total revenue generated was \$780,711.08. Some of this revenue was put to work right away in 2018 but much of it would be planned to spend in 2019.

## **2. Summary of Expenses**

The following table summarizes all expenses undertaken for work as the Backstop Aggregator of the Oregon Clean Fuels Program in 2018. Forth Mobility Fund is a 501 (c)(3) nonprofit closely affiliated with Forth, which is a 501 (c)(6) trade association. Forth Mobility Fund, the Backstop Aggregator, receives and then deposits revenues generated from the monetization of the Clean Fuels credits while Forth carries out the scope of work outlined in the work plan and the activities described in the annual report. The funds Forth Mobility Fund receives are recognized as a separate revenue source titled Clean Fuels in our accounting system. Forth generates expenses relevant to carrying out the Clean Fuels work such as employee salaries and contracts. These expenses are identified in the Forth accounting system as work specific to the Clean Fuels contract. On a monthly basis, these Forth expenses are outlined in an invoice to Forth Mobility Fund and a transfer between the two entities is completed. Forth then recognizes the revenue source as Clean Fuels funding. An audited report, consolidated for both organizations, is provided along with this report.

The annual audit for year ending December 31, 2018 includes “Clean Fuels Program” revenue listed as a separate revenue source and outlines that 30% of Forth Mobility Fund’s revenue was derived from the State of Oregon’s “Clean Fuels Program”. Forth Mobility Fund will implement changes as part of the audit for year ending December 31, 2019 to include a greater level of detail in the notes to consolidated financial statements. This note will include detail about the percentage of revenue that is derived “Clean Fuels Program” and will elaborate on the specific activities funded by the “Clean Fuels Program”.



Expense Category	Expense
Personnel	\$ 42,397.53
Contract Services	\$ 20,129.89
Travel & Meals	\$ 342.51
Event Expense	\$ 563
Occupancy & Telecommunications	\$ 5,022.39
Supplies & Materials	\$ 254.20
Equipment Lease & Maintenance	\$ 3,651.77
Insurance (Included in Indirect)	\$ 0
<b>Total Direct Expenses</b>	<b>\$ 72,361.29</b>
<b>Indirect/Overhead Expenses</b>	<b>\$ 56,319.93</b>
<b>Administrative Expenses (Capped at 10%)</b>	<b>\$ 4,273.91</b>
<b>Total Expenses (with Indirect Overhead)</b>	<b>\$ 132,955.13</b>

Aside from the breakdown of expenses outlined above, Forth Mobility Fund is unable to provide a summary of expenses specific to Statewide Consumer Engagement (Task 2) or Utility Engagement (Task 3). Given that the contract was finalized and activities began in late 2018, our budget setup at the time did not allow us to track these programs specifically. Forth Mobility Fund adjusted our budget accounting procedures to accommodate additional program cost tracking for 2019. As such, we expect to be able to report more accurately the spending between these programs for the 2019 Annual Report.

#### **a) Detailed Summary for Focused Local Programs (Task 4)**

During the fall of 2018, following the execution of our contract, Forth Mobility Fund spent time developing a workplan for the remainder of 2018 and a larger amount of time planning for work to be completed in 2019. Given this, there was only a short opportunity of time to commit to Task 4, Focused Local Programs. Early on, Forth Mobility Fund decided to partner with The Environmental Center, located in Bend, OR, given our previous history with this organization and their demonstrated preparedness and enthusiasm for promoting EVs in Central Oregon. We entered into a contract with the Environmental Center for \$25,000 which would be paid through monthly invoices with work performed. A thorough description of work performed is included in Section 3c of this report. In summary, the Environmental Center hosted two ride and drive events, coordinated a group buy, hosted a 'Power Hour' event specifically focused on electric vehicles, and conducted surveys of the general public to better



understand the level of awareness and support of electric vehicles in the greater Bend community. The following table outlines expenses that were utilized each month via The Environmental Center. As with Tasks 2 and 3, Forth Mobility Fund did not have accounting procedures in place to account for Forth Mobility Fund’s expenses directly associated with Focused Local Programs. This has been corrected for 2019 and will be reflected in the next annual report.

Time Period	Expense Description	Expense Amount
September	Personnel Time	\$3,432.67
October	Personnel, Event Expenses	\$5,287.25
November	Personnel time, travel expenses	\$3,272.54
December	Personnel Time	\$3,775.60
<b>Total</b>		<b>\$15,768.06</b>

**b) Detailed Summary for Program Administration (Task 5)**

Program Administration costs in 2018 only consisted of personnel time and associated overhead allocations. Personnel time was spent securing a third-party contractor (CleanFuture) to monetize credits, working with that contractor to do so, producing both the 2018 and 2019 workplans, and preliminary work and planning for the 2018 annual report. In addition, subcontracting costs associated with monetizing the credits are also shown. Please note these costs were not directly incurred by Forth Mobility Fund but were claimed by our subcontractor, CleanFuture, at the point of the sale of the credits.

Expense Category	Expense Amount
Personnel	\$ 2,352.90
Indirect/Overhead Expenses	\$ 1,921.01
Third Party Contractor Costs*	\$ 13,836.43
<b>Total*</b>	<b>\$ 18,110.34</b>
<b>Total less contractor costs</b>	<b>\$ 4,273.91</b>

**3. Description of Activities Performed**



Tasks specifically defined in the 2018 Work plan are listed below in italics and described in further detail in the text that follows. Please note that there are activities described that were not included in the work plan submitted to Oregon Department of Environmental Quality but are included here to provide a more complete picture of the activities Forth Mobility Fund is able to carry out utilizing Clean Fuels Program revenue. Prior to the execution of the contract to become the Backstop Aggregator, the geographic and programmatic scope of our work was limited. As Backstop Aggregator, Forth Mobility Fund is able to significantly increase its geographic reach across Oregon and particularly into rural communities that previous funding sources were not sufficient to support. The benefits of transportation electrification certainly, and in some ways more so, extend to areas that have traditionally been underserved in access to and information about electric vehicles. As such, Forth Mobility Fund and its community partners look forward to a continued increase in capacity.

**a) Statewide Consumer Engagement (Task 2)**

*Tasks: Deliver electric vehicle outreach & education throughout Oregon  
National Drive Electric Week R&D Event: Eugene  
National Drive Electric Week R&D Event: Portland (Wilsonville)  
Oregon People's Utility District Association Conference R&D (Springfield)*

Throughout 2018, Forth Mobility Fund delivered electric vehicle outreach & education throughout Oregon via the standalone and mobile Go Forth Electric Showcase. This entails providing general information related to electric vehicles, charging, and financial incentives through in-person interactions, distribution of physical and digital resources, and online webinars. Additionally, the Go Forth Electric Showcase features five different plug-in vehicles available for test drives. As mentioned above, we look forward to extending the reach of our Statewide Consumer Engagement work to include a greater proportion of the State in 2019 and beyond. The workplan that informed the activities described below was created to cover the greater Portland Metro region at the end of 2018, with the intention that these efforts would expand more broadly in 2019.

There were a total of 555 visitors to the Go Forth Electric Showcase between September and December 2018, including 214 test drives. Over the course of this period, Forth Mobility Fund hosted a total of six ride and drive events with a total of 163 test drives at these events alone. In addition, Forth Mobility Fund hosted seven events at the Go Forth Electric Showcase for a total of 186 visitors, including a school group from a traditionally underserved community in Portland.

Community education and outreach in the Portland Metro region also occurred throughout the fall of 2018. This included tabling and static vehicle displays at community events. Forth Mobility Fund appeared at the following events:

- Garden Home Fix-It & Sustainability Fair, Portland: October 12, 2018



Forth Mobility Fund provided general outreach and educational materials about electric vehicles. A representative from Platt Auto brought a Nissan Leaf to provide test drives. A total of 10 visitors were engaged. Low visitation is largely attributed to the fact that Forth Mobility Fund's exhibit was the only one outside, other exhibitors were inside a gymnasium.

- EV 101 Presentation at Hacienda Community Development Corporation, Portland: November 14, 2018

Forth Mobility Fund led a presentation in English and Spanish about electric vehicles, charging, and financial incentives. We provided general outreach and educational materials about electric vehicles in English and Spanish and brought a vehicle to display. A total of 8 people attended this event.

- Madison High School Fix-It Fair, Portland: November 17, 2018

Forth Mobility Fund provided general outreach and educational materials about electric vehicles. There was no event on display as this was an indoors only event. A total of 79 people were engaged.

### Ride and Drive Events

In fall of 2018, Forth Mobility Fund alone facilitated six ride and drive events across Oregon, delivering 163 test drives.

- Gateway Cruise-In, Portland: September 1, 2018

Forth Mobility Fund provided a Chevy Bolt for test drives as well as general education and outreach at a table. One test drive was completed at this event.

- Home and Garden Fair, Eugene: September 9, 2018

Forth Mobility Fund provided a Chevy Volt for test drives at this event during National Drive Electric Week as well as general education and outreach at a table. A total of 40 test drives were completed at this event.

- Pacific Power Employee Ride and Drive, Portland: September 12, 2018

Forth Mobility Fund provided a Chevy Bolt and Honda Clarity EV for this event as well as general education and outreach at a table. A total of 30 test drives were completed at this event.

- National Drive Electric Week, Wilsonville: September 15, 2018

Forth Mobility Fund provided a Honda Clarity for this National Drive Electric Week event, participated in a raffle by providing prizes, and provided general education and outreach at a table. A total of 78 test drives were completed at this event.

- Oregon People's Utility District Association Conference, Springfield: September 20, 2018

Forth Mobility Fund provided a Chevy Bolt and a Chevy Volt for test drives during an OPUDA Annual Meeting for utility staff and general managers from across the state. A total of 6 test drives were completed at this event.

- Lyft Headquarters, Portland: December 11, 2018

This event was intended to serve Lyft drivers that were interested in possibly obtaining an electric vehicle as a future car to drive on the platform. This was the first event of a larger campaign that would be formally launched in Portland in 2019. In addition to providing an EV101 presentation with general education about EVs to roughly 40 people, Forth Mobility Fund provided a Honda Clarity EV and a Chevrolet Bolt for demonstrations and test drives. A



representative from Portland General Electric provided a presentation about charging infrastructure and a veteran Lyft EV driver spoke about his experience in driving for Lyft in his Nissan Leaf. Due to limited staff available at this event and particularly wet weather, only eight test drives were conducted.

### Other Activities

Forth Mobility Fund recognizes the importance of electrifying transportation network companies (TNCs) and educated the drivers is crucial in transportation electrification. In addition to our engagement with TNC drivers through a ride and drive event, Forth Mobility Fund also deployed a number of educational resources for riders in plug-in Lyft and Uber vehicles in late 2018 to increase awareness to the general public.

The nature of our consumer engagement work naturally engages with an unknown number of employers. Forth Mobility Fund hosted a webinar series on Workplace Charging in November 2018, of which the audience was intended to be employers. The first was on November 13, 2018 and had 22 attendees. The second took place on November 20, 2018 and also had 22 attendees.

Aside from general outreach to employers, the following were directly engaged with in late 2018 either by Forth Mobility Fund or The Environmental Center in the course of planning and outreach surrounding the Oregon Clean Fuels Program: Pacific Power, Portland General Electric, City of Bend, City of Eugene, City of Corvallis, City of Ashland, City of Hillsboro, Hacienda Community Development Corporation, Oregon Food Bank, Eugene Water and Electric Board, Emerald People's Utility District, Columbia River People's Utility District, Salem Electric, Midstate Electric, Central Electric Cooperative, Smolich Nissan, Blachly-Lane Electric Cooperative, Idaho Power, Wasco Electric Cooperative, Daimler, Lane County Council of Government, Lane Electric, Portland State University, Verde, Home Forward, Benton Community Foundation, Casa Latinos Unidos, Oregon Community Foundation, Oregon People's Utility District Association, Northwest Public Power Association, Oregon Municipal Electric Utility Association, Oregon Rural Electric Cooperative Association, Bonneville Environmental Foundation, Bonneville Power Administration, and Northwest Requirements Utilities.

In addition to general consumer engagement that occurs via the stand-alone and mobile Go Forth Electric Showcase described above, marketing and awareness campaigns undertaken by Forth Mobility Fund occurred across our various social media channels and our website, newsletter, and event promotions. Our Facebook page has greater than 600 followers and 52 posts were made during the months of September-December 2018. The Forth Mobility Fund Twitter account has greater than 2,800 followers and featured greater than 9,000 posts between September and December. Our Instagram account, with greater than 400 followers, had roughly 40 posts.

Forth Mobility Fund's e-mail newsletter is sent to over 7,600 people each month and is regularly opened by over 1,000 of those recipients. These recipients include consumers but



also representatives from regional employers, industry professionals, and transportation electrification advocates. In addition to a monthly newsletter, there were 13 separate event blasts to this newsletter group between September and December 2018. Forth Mobility Fund's website received between 1,500-2,000 visits per month, with about one-third of those visits being directed to the page about the Go Forth Electric Showcase. In addition to information about the Showcase, the website features information about EVs, charging, financial incentives, and access to our webinars and events calendar. Forth Mobility Fund also hosted monthly networking events with speakers that discussed many of the challenges facing EV consumers. These events feature about 45 attendees each month.

### **b) Utility Engagement (Task 3)**

*Tasks: Initial contact to all utilities that are in Backstop Aggregator program  
Webinar for Utility Working Group (Q4)*

Following the execution of our contract, the remainder of 2018 was spent deepening existing relationships and fostering new ones with utilities throughout Oregon. This included outreach to utilities that had and had not opted-in to the Clean Fuels Program already. In talking with utilities and community partners across the State about ways to accelerate transportation electrification among consumers, our focus was to set ourselves up for work to be completed in 2019. Direct contact and engagement occurred with the following Oregon utilities: Portland General Electric, Pacific Power, Eugene Water & Electric Board, Emerald People's Utility District, Columbia River People's Utility District, Salem Electric, City of Ashland, Midstate Electric Cooperative, Central Electric Cooperative, Blachly-Lane Electric Cooperative. In many cases, conversations with utilities across the state led to questions that were best answered by one of Forth Mobility Fund's network of industry experts. We feel the role of making introductions within this space for technical questions and experiential advice is a huge value that Forth Mobility Fund is able to provide to utilities. In other cases, Forth Mobility Fund is able to provide direct advice to utilities on program design, consumer engagement strategies, and general best practices.

Forth Mobility Fund was also invited to participate in a regional EV coalition call to talk about the Oregon Clean Fuels Program and its role as Backstop Aggregator, organized by Eugene Water & Electric Board, which convenes quarterly to share updates, strategies, and challenges associated with transportation electrification in the utility space. In October, there were representatives on the call from Central Lincoln People's Utility District, City of Ashland, Emerald People's Utility District, Oregon Department of Transportation, University of Oregon, Lane County Council of Government, City of Eugene, Lane Electric, Springfield Utility Board, and Tillamook People's Utility District. On this call, Forth Mobility Fund identified a need and desire for utility-branded resources about electric vehicles and offered to co-brand Forth Mobility Fund's existing resources for any partners interested.



The task 'Initial contact to all utilities that are in Backstop Aggregator program' is still in progress as Forth Mobility Fund continues to conduct outreach in 2019. Part of this outreach process has included engaging with utility associations across the region such as Oregon People's Utility District Association, Northwest Public Power Association, Oregon Municipal Electric Utility Association, and Oregon Rural Electric Cooperative Association, among others. These organizations in addition to partnerships with Bonneville Environmental Foundation, Bonneville Power Administration, and Northwest Requirements Utilities will guide much of our work in engaging with utilities across the state.

Forth Mobility Fund also continued to convene a quarterly Utility Working Group Webinar. The webinar for the 4<sup>th</sup> Quarter of 2018 took place on November 6<sup>th</sup>, 2018. In total, 219 people were invited from utilities or utility-related associations across the country, 42 attended to hear speakers from Austin Energy and City of Burlington, Vermont. This and all Forth Mobility Fund-hosted webinars are available as recordings on our YouTube channel.

#### **c) Focused Local Programs (Task 4)**

In 2018, focused local programs were designed for Central Oregon, serving the utility customers of Central Electric Cooperative. Given the territories of utilities in this part of the State, we recognized that our efforts in Central Oregon would also benefit the customers of Midstate Electric Cooperative and Pacific Power.

Forth Mobility Fund also spent time in 2018 developing relationships with utilities and other partners in other parts of Oregon that would be incorporated into our focused local programs in 2019. For example, a need was identified to partner with a local organization in Southern Oregon to help facilitate our work in the Ashland area in 2018. Additionally, initial contacts were made to several community-based organizations in the areas surrounding Corvallis, which is served by Consumers Power, Inc. These areas, among others, will be receiving targeted local programs in 2019 as the best partners are identified. Forth Mobility Fund seeks to launch at least one rural transportation equity project in 2019, most likely in Southern Oregon, Central Oregon, or the Corvallis area.

*Tasks: Subcontractor agreement complete for Central Oregon Community-Based Organization  
National Drive Electric Week R&D Event: Bend  
Vehicle R&D and awareness campaign in Central Electric Co-Op service territory  
Conduct research and focus groups to understand most effective tactics to raise awareness and support; identify infrastructure needs  
Deliver an electric vehicle "group buy" in Central Oregon*

For our work in Central Oregon, Forth Mobility Fund subcontracted with The Environmental Center, based in Bend. This organization is well respected in the community and we felt confident in their ability to increase awareness and adoption of electric vehicles. The





Environmental Center leveraged existing contacts and resources and made new ones to begin work right away. The work completed by the Environmental Center follows. Forth Mobility Fund was kept aware of the activities of the Environmental Center through bi-weekly check-in phone calls as well as occasional in-person visits.

### Ride and Drives

- Elkibou's Food Cart, Sunriver: September 10, 2018

Partners included Midstate Electric Cooperative, Clipper Creek, local EV owners, Smolich Nissan, and Bend Kia. Roughly 25 people were engaged and fewer than 5 test drives completed.

- Compass Park, Bend: September 12, 2018

Partners included Bend EV Club, The Environmental Center, Central Electric Cooperative, Smolich Nissan, Arcimoto, and local EV owners. Vehicles included: 2019 Leaf, Arcimoto FUV, BMW i3, Volkswagen e-Golf, Kia Soul Electric, Tesla Model S and Model 3, Nissan LEAF, Chevy Bolt and a Zero FXS electric motorcycle. Roughly 50 people were engaged and 15-20 test drives completed.

### Research and Focus Groups

A large part of The Environmental Center's strategy for 2018 was to get a better sense of the awareness of EVs in Bend and any concerns or misconceptions people had. They began conducting formal and intercept surveys in September 2018. In total, 27 formal responses, and 30 informal intercept surveys, for which data was not recorded, were conducted. In addition to common EV concerns such as range anxiety, price, and availability of charging, Central Oregonians were concerned about switching from an AWD vehicle to an EV with 2WD. A general concern existed about a lack of robust charging infrastructure network for both CCS and CHAdeMO DC Fast Charging in order to travel south and east in the State. Current Drivers suggested many local and regional EV charging destinations.

### Group Buys

From October through December 2018, The Environmental Center organized a group buy in partnership with Smolich Nissan and the area utilities to allow for \$4000 off any new Nissan Leaf purchased or leased. This offer was available for Central Electric Cooperative, Midstate Electric Cooperative, and Pacific Power through the end of November and then Pacific Power only for the month of December. The Environmental Center also coordinated for Central Electric Cooperative to join Pacific Power in offering utility group buy discounts in Q1 of 2019.

### Other Events

The Environmental Center hosted a Green Home Tour on September 29, 2018 which featured homes that produced enough energy themselves to power electric vehicles. A 2019 Nissan Leaf was provided by Smolich Nissan for test drives as well. In total, over 300 visitors attended the event and 4 test drives were conducted. In addition, an electric bicycle demonstration was included in the tour which allowed for 20 test rides.



Fall Fest took place in Bend on October 6<sup>th</sup> and 7<sup>th</sup>, 2018. This event featured public outreach to local residents and visitors from around the state, engaged the public in charging demonstrations, discussions about vehicles available in Oregon, and shared information about the group buy. This took place over two 8-hour days and allowed for 200+ direct impressions (conversations).

On October 11, 2018 The Environmental Center hosted an event, “Power Hour: Shifting the Electric Vehicle Market Into High Gear.” This event, held in Bend, featured speakers from The Environmental Center, Jessica Reichers from Oregon Department of Energy, and Kelly Yearick of Forth Mobility Fund. Guest speakers discussed the benefits of electric vehicles, the state of the market, financial incentives, and answered audience questions. In total, there were 60 attendees.

The Environmental Center also established a relationship with Mt. Bachelor to start building out an electric vehicle plan and secure funding to install public charging in an effort to alleviate the identified gap in regional charging.

Lastly, The Environmental Center encouraged Central Electric Coop to focus on building out an electric vehicle strategy in 2019.

#### **d) Program Administration (Task 5)**

*Tasks: Contract signed with DEQ*

*Work plan approved by DEQ (2018)*

*Planning for 2019 EV education & outreach*

*Prepare Work plan for 2019*

Forth Mobility Fund signed a contract with Oregon Department of Environmental Quality in August 2018 to be the Backstop Aggregator for the Oregon Clean Fuels Program and received the credits from 2016 and 2017 in September of 2018. Forth Mobility Fund subcontracted with a third party, CleanFuture, to assist with monetizing credits. Time was spent facilitating the contract agreement and transferring credits to be sold by CleanFuture. Once the credits were monetized, Forth Mobility Fund spent time developing the 2018 Work plan which was approved by Oregon Department of Environmental Quality in September 2018. In addition, time was spent developing the 2019 Work plan. Forth Mobility Fund submitted the 2019 Work plan to Oregon Department of Environmental Quality in December 2018.

Program administration was only a small component of the work conducted by Forth Mobility Fund in 2018. A change in our accounting methods for 2019 will allow for a more detailed breakdown of tasks being covered by the 10% (maximum) of total revenue.

