



Clean Fuels Backstop Aggregator Workplan (September 11, 2018)

Utility Engagement

Over the last few years, Forth has helped dozens of utilities across the region learn more about electric vehicles, develop electric vehicle adoption plans and strategies, and deliver plug-in electric car ride and drive events to utility customers. We have also developed numerous ways to talk about electric vehicles and educate consumers about the need for and benefits to transportation electrification. Using the Backstop Aggregator program Forth will be able to expand this programming and deliver focused trainings, ride and drives, and utility training in areas throughout Oregon. We plan to sell a significant portion, if not all, of the distributed credits by the end of 2018. Unsold credits and unspent monetized funds will carry over to 2019 as necessary but we intend to utilize all monetized credits within 12-15 months.

Focused Local Programs

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. 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
- Regional “group buy” programs that offer special pricing to local buyers of electric vehicles for a limited time
- Local rebates or incentives for electric vehicles or charging equipment
- Targeted local demonstration and pilot projects to promote electric mobility options, particularly for traditionally underserved communities

Outreach and Awareness Program

Forth has a number of electric vehicle and charging education and awareness campaigns that will be implemented state-wide as part of this program. Additionally, the “priority” utilities that have generated a substantial amount of credits will receive targeted engagement designed around their stakeholder and ratepayer needs. Based on our assessment these utilities are Central Electric Co-Op and West Oregon Electric Co-Op.

The work plan listed below includes activities and programs to be carried out by Forth and contractors through December 31, 2018.

TASK	RESPONSIBILITY	DUE DATE	STATUS
Contract signed with DEQ	Forth/DEQ	August 2018	Complete
Work plan approved by DEQ	Forth/DEQ	September 2018	<input type="checkbox"/>
Subcontractor agreement complete for Central Oregon CBO (Environmental Center)	Forth/Environmental Center	September 2018	<input type="checkbox"/>
Deliver electric vehicle outreach & education throughout Oregon	Forth	Q3 2018 - Ongoing	<input type="checkbox"/>
National Drive Electric Week R&D Event: Eugene	Forth	September 9, 2018	Complete
National Drive Electric Week R&D Event: Bend	Forth/Environmental Center	September 12, 2018	<input type="checkbox"/>
National Drive Electric Week R&D Event: Portland (Wilsonville)	Forth	September 15, 2018	<input type="checkbox"/>
Oregon People's Utility District Association Conference R&D: Eugene (Springfield)	Forth	September 20, 2018	<input type="checkbox"/>
Initial contact to all utilities that are in backstop aggregator program	Forth	October 2018	<input type="checkbox"/>
Vehicle R&D and awareness campaign in Central Electric Co-Op service territory	Forth/ Environmental Center	Q4 2018	<input type="checkbox"/>
Conduct research and focus groups to understand most effective tactics to raise awareness and support; identify infrastructure needs	Forth/Environmental Center	Q4 2018/2019	<input type="checkbox"/>
Deliver an electric vehicle "group buy" in Central Oregon	Forth/ Environmental Center	Q4 2018	<input type="checkbox"/>
Webinar for Utility Working Group	Forth	November 6, 2018	<input type="checkbox"/>
Planning for 2019 EV education & outreach	Forth	Q4 2018	<input type="checkbox"/>
Prepare Work plan for 2019	Forth	December 31, 2018	<input type="checkbox"/>

Expected budget through December 31, 2018

EXPENSE CATEGORY	EXPENSE
Ride and Drives (5)	\$ 70,949.00
Contractor (Environmental Center)	\$ 25,000.00
Personnel: Program Manager and Support Staff- Research, General Planning and Program Implementation	\$ 35,879.00
Administration (10%): Time managing contracts, subcontracts, selling credits, etc.	\$ 13,182.80
TOTAL	\$ 145,010.80

Expense breakdown for a typical Ride and Drive event

EXPENSE CATEGORY	EXPENSE	
Personnel	\$ 13,727	Director-5 hours-oversight of ride and drive, contracts, planning Program Manager-66 hours-project management and organization. Includes onsite presence day-of, dealer outreach, etc. and travel Communications Manager-3 hours-development of flier or other materials Program Associate-24 hours-onsite presence and assistance in days leading up to the event from one associate, and travel
Travel & Meals	\$ 984	T&M for 1 Manager and 1 Associate for 2 days at a rate of \$74/day for meals, 1 hotel room for each employee at a rate of \$244/night, and \$50 for travel costs per day (cost of fuel and vehicle wear and tear for 2 vehicles)
Event Expense	\$ 1,800	Includes any equipment or space rental fees, food and drinks for the event, holding costs for equipment and vehicles if they are used, and photographer and/or videographer
Supplies & Materials	\$ 1,000	Includes cost of giveaways, printing costs for literature, and any other supplies that may be needed
Indirect Overhead	\$ 2,627	15%
TOTAL	\$ 20,137	

Notes:

- Above firm fixed total burdened billing rate includes all base labor costs for employee benefits, payroll taxes, payroll related expenses, payroll related insurance, employer contributions, other event related costs, administrative expense and profit
- Personnel time listed is in addition to budgeted personnel requirements for ride and drives