GREEN VEHICLE GRANT FUNDING SOURCES

Richard Battersby, CPFP, CAFM
University of California, Davis
East Bay Clean Cities Coalition
If you only write down one thing........

www.cleancitieseastbay.org
Funding Strategies 101

- Funding sources
- Locating opportunities
- Keeping up to date
- Applying for funding
Funding Strategies 101

- Clean air vehicles cost more
- Internal funding mechanisms (you pay for it)
- External funding sources (somebody else pays for it!)
- Public vs. private fleet
Funding Strategies 101

- Grants
- Vouchers/Incentives
- Rebates/tax credits
- Leasing?
**Grant Types**

- **Competitive**: Multiple entities vying for a limited amount of funding (e.g. Clean Cities Petroleum Reduction)

- **Formulaic**: No competition; distributed based upon established percentages (population, etc.)
  (e.g. Energy Efficiency and Conservation Block Grant EECBG)

- **Categorical**: For specific projects, may require match

- **Block**: Formulaic grants, as provided to states for further award

- **Earmark**: Awarded through legislation
THE FUNDING PYRAMID

Federal

State

Local
THE INVERTED FUNDING PYRAMID

$ $$
Threshold
Effort
Paperwork

Federal
State
Local
FUNDING SOURCES
FEDERAL

- Department of Energy (DOE)
  - EERE, VTP, SEP, Clean Cities

- Environmental Protection Agency (EPA)
  - National and Regional, NCDC and DERA clean diesel
  http://www.epa.gov/otaq/diesel/index.htm

- Department of Transportation (DOT)
  - FTA, FHWA, TCSP, FAA (VALE), etc.

- Department of Agriculture (USDA)
  - REAP, Flex Fuel dispensers, biofuel production
FEDERAL GRANT SOURCES (test)

DOE  EPA  DOT  USDA  IRS
For your state energy office, look here:
http://www.naseo.org/members/states/default.aspx

Alternative Fuels Data Center
http://www.afdc.energy.gov/afdc/states/

There may be multiple state level funding entities
Example: CA Energy Commission and Air Resources Board
http://www.naseo.org/members/states/default.aspx
NASEO STATE ENERGY OFFICE LOCATOR

State/Territory Energy Offices

NASEO State & Territory Members
California

California Energy Commission
1516 Ninth Street, MS #39
Sacramento, CA 95814-5512
916.654.4287 fax: 916.654.4423
www.energy.ca.gov

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CALIFORNIA REPUBLIC

Map of California
LOCAL

- Air/Pollution Control Districts
- Metropolitan Planning Organizations (MPO)
- Congestion Mitigation & Air Quality (CMAQ) Funds
- Local Clean Cities Coalition

- Transit/Transportation Authorities
- Utilities
- Cy pres, non-profits, and corporate philanthropy
- Carbon/pollution offsets and credits (?)
MPO LOCATOR

http://www.bts.gov/external_links/government/metropolitan_planning_organizations
LOCAL CLEAN CITIES COALITIONS

Click on a coalition for more information.

http://www.afdc.energy.gov/cleancities/coalitions/coalition_locations.php
MISCELLANEOUS/NON-TRADITIONAL

• Cy pres legal settlement funds
  (Petroleum spills, emissions, environmental damage, etc.)

• Carbon/pollution offsets (?)
  (TerraPass, Carbonfund.org, etc.)

• Corporate philanthropy
  (Google RechargeIT, AAA Greenlight Initiative, etc.)

• Public Charities
  (example: The Rose Foundation, Northern California)
Cy pres legal settlement funds

- Meaning “As near as possible”
- Sources: legal settlements or trusts
- Funding limited to a specific issue
- Project criteria may be less specific
- No routine notification process
MISCELLANEOUS/NON-TRADITIONAL

Carbon/pollution offsets

• Entities pay to offset carbon or pollution
• Payments then used to fund green projects
• Funding typically limited to specific issues
• Projects not directly fleet related (yet....)
  – TerraPass http://www.terrapass.com/
  – Carbonfund.org http://www.carbonfund.org/
INFORMATION RESOURCES
INFORMATION RESOURCES

- Local Clean Cities Coalition (!)
- Websites (Clean Cities, AFDC, grants.gov)
- List serves, newsletters, and e-bulletins
- Industry/trade organizations (NGVA, NBB)
- Vendors
- Fuel providers
- Peers
LOCAL CLEAN CITIES COALITION

Grants.gov

Recovery.gov

Department of Energy (DOE)

Environmental Protection Agency (EPA)

Department of Transportation (DOT)

Department of Agriculture (USDA)

FEDERAL CLEAN AIR VEHICLE FUNDING SOURCES

The East Bay Clean Cities Coalition provides the latest information on funding for alternative fuel vehicles (AFV) and related clean air projects.

Search for funding opportunities for alternative fuel vehicle (AFV) and other related clean air vehicle and transportation projects using the links provided. You may also search for related laws and regulations using the the Laws and Incentives link. You may wish to bookmark this page or add it to your "Favorites" to make it easier for you to check back often for the latest updates. This page is updated regularly as we become aware of the latest funding opportunities. While you are here, please subscribe to our East Bay Clean Cities electronic newsletter to remain up to date on all the latest funding opportunities and consider subscribing to the various funding advisories and DOE national Clean Cities newsletters using the convenient links provided below:

STAY UP TO DATE ON THE LATEST AFV NEWS

You may subscribe to various funding advisories and DOE national/local East Bay Clean Cities newsletter using the links provided below:

- FREE- Subscribe to East Bay Clean Cities e-bulletins
- FREE- Subscribe to DOE Clean Cities News newsletter
- FREE- Subscribe to monthly "Solicitations" email advisory bulletin (to subscribe send blank email using link above)
- FREE- Subscribe to US EPA funding email notifications
- FREE- Subscribe to CA Energy Commission ARRA list serve
- FREE- Subscribe to CA Energy Commission solicitations list serve
- FREE- Subscribe to CA Air Resources Board list serves

www.cleancitieseastbay.org/federal.html
LOCAL CLEAN CITIES COALITION

CA Energy Commission

Air Resources Board

CalRecycle

EPA Region 9

Federal Funding

Local Funding

STATE CLEAN AIR VEHICLE FUNDING SOURCES

The East Bay Clean Cities Coalition is your single source provider for the best information on clean air vehicle and associated clean air and petroleum displacement funding opportunities. We are pleased to provide the latest information on funding for alternative fuel vehicles (AFV) and related clean air projects listed below. You may wish to bookmark this page or add it to your “favorites” to make it easier for you to check back often for the latest updates. This page is updated regularly as we become aware of the latest funding opportunities.

The California Energy Commission (CEC) provides numerous alternative fuel vehicles and clean air funding sources through the State Energy Program (SEP), the Energy Efficiency and Conservation Block Grant (EECBG) Program, the Public Interest Energy Research (PIER) Program, and other transportation related funding opportunities. The 2010-2011 Investment Plan for CEC’s Alternative and Renewable Fuel and Vehicle Technology Program is specifically authorized by Assembly Bill 118. A list of all current California Energy Commission funding opportunities is found here: current CA Energy Commission Funding Opportunities.

The California Air Resources Board (CARB) provides numerous alternative fuel and clean air vehicle related funding opportunities including a hybrid truck and bus voucher incentive project and a zero emission and plug-in hybrid light duty vehicle rebate project under the Air Quality Improvement Program. CARB also administers the Enhanced Fleet Modernization Program. Both of these funding opportunities are authorized by Assembly Bill 118. A listing of all current California Air Resources Board funding opportunities is found here: current CA Air Resources Board Funding Opportunities.

www.cleancitieseastbay.org/state.html
LOCAL CLEAN CITIES COALITION

Bay Area AQMD

Yolo/Solano AQMD

EPA Region 9

Metropolitan Transportation Commission

Federal Funding

State Funding

LOCAL CLEAN AIR VEHICLE FUNDING SOURCES

The East Bay Clean Cities Coalition is your single source provider for the best information on clean air vehicle and associated clean air and petroleum displacement funding opportunities. We are pleased to provide the latest information on funding for alternative fuel vehicles (AFV) and related clean air projects listed below. You may wish to bookmark this page or add it to your "Favorites" to make it easier for you to check back often for the latest updates. This page is updated regularly as we become aware of the latest funding opportunities.

The Bay Area Air Quality Management District (BAAQMD) is the public agency entrusted with regulating stationary sources of air pollution in the nine counties that surround San Francisco Bay: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, southwestern Solano, and southern Sonoma counties. BAAQMD represents the majority of the geographical region covered by the East Bay Clean Cities Coalition. BAAQMD also sponsors numerous clean air vehicle and related funding programs including:

- Carl Moyer Program
- Climate Protection Grant Program
- Greenhouse Gas Reduction Grant Program
- Heavy Duty Engine Projects
- Lower Emissions School Bus Program
- Goods Movement Program
- Transportation Fund for Clean Air Vehicles (TFCA)
- Vehicle Buy Back Program

www.cleancitiestheastbay.org/local.html
NATIONAL CLEAN CITIES (DOE)

Financial Opportunities

Securing funding is critical to the success of efforts to reduce petroleum use in transportation. Financial opportunities for Clean Cities projects are available from many sources inside and outside the U.S. Department of Energy (DOE).

When applying for funding, contact your Clean Cities coordinator for help navigating the process successfully.

Current Financial Opportunities

Find current transportation-related financial opportunities, including Clean Cities Funding Opportunity Announcements issued by DOE, when available.

Related Financial Opportunities

Learn about related financial opportunities to pursue through organizations and federal agencies outside Clean Cities.

Funded Clean Cities Projects

Clean Cities has awarded more than $300 million to fund hundreds of projects across the country that reduce petroleum use in transportation.

http://www1.eere.energy.gov/cleancities/financial_opps.html
Related Financial Opportunities

Transportation-related financial opportunities from organizations and federal agencies outside Clean Cities are listed below. Some of the government agencies listed have ongoing funding available; others issue funding notices periodically or assist in forming partnerships that can provide funding opportunities for transportation-related projects.

Congestion Mitigation and Air Quality Improvement

The Congestion Mitigation and Air Quality Improvement (CMAQ) program, administered by the Federal Highway Administration and the Federal Transit Administration, funds projects and programs that reduce transportation-related emissions and relieve traffic congestion. Funds are distributed locally through metropolitan planning organizations.

Environmental Protection Agency

The U.S. Environmental Protection Agency (EPA) offers transportation-related financial opportunities through several avenues:

- National Clean Diesel Campaign: EPA provides funding for idle reduction, cleaner fuels, vehicle replacements, and other strategies that reduce human exposure to diesel exhaust.
- Grants and Fellowship Information: EPA provides links to grant programs and information about applying for EPA grants.
- EPA Regions: EPA regional offices can issue funding for projects in their respective geographic areas, which is the case for programs such as Clean School Bus USA.
- Environmental Education Grants Program: EPA’s Office of Environmental Education supports projects that enhance public awareness, knowledge, and skills to help citizens make informed decisions that affect environmental quality.

Grants.gov

Grants.gov is an information hub for more than 1,000 grant programs of 25 federal government agencies. Grants.gov allows organizations to search and apply for competitive grant opportunities online. Search for grant opportunities on Grants.gov.

State Energy Offices

State energy offices research, demonstrate, and deploy renewable energy and energy-efficient technologies; spur energy-related economic development; and promote energy security and emergency preparedness. These offices can help you locate project funding. Find your state energy office from the National Association of State Energy Officials website.

Additional Funding Leads

Explore additional funding opportunities from federal government agencies.
http://www.afdc.energy.gov/laws/
Federal Incentives and Laws

Listed below are federal incentives, laws and regulations, funding opportunities, and other federal initiatives related to alternative fuels and vehicles, advanced technologies, or air quality. Additional incentives may also be available through Clean Cities Financial Opportunities. For more information, see the points of contact section or refer to:

- Key Federal Legislation Summaries
- Recent Federal Actions

Incentives, Laws, and Programs

The information in this list is updated after legislation is enacted.

Sort by: Category Agency

Incentives
- Advanced Biofuel Feedstock Incentives
- Advanced Biofuel Production Grants and Loan Guarantees
- Advanced Biofuel Production Payments
- Advanced Energy Research Project Grants
- Advanced Technology Vehicle (ATV) Manufacturing Incentives
- Alternative Fuel Tax Exemption
- Bipolar Transportation Research Funding
- Bipolar Education Grants
- Biomass Research and Development Initiative
- Cellulosic Biofuel Producer Tax Credit
- Ethanol Infrastructure Grants and Loan Guarantees
- Fuel Cell Motor Vehicle Tax Credit
- Hydrogen Fuel Excise Tax Credit
- Hydrogen Fuel Infrastructure Tax Credit
- Hydrogen Fuel Mixture Excise Tax Credit
- Idle Reduction Equipment Excise Tax Exemption
- Improved Energy Technology Loans
- Qualified Plug-In Electric Drive Motor Vehicle Tax Credit
- Value-Added Producer Grants (VAPG)
AFDC STATE RESOURCE DIRECTORY

State Incentives and Laws
To view a state’s incentives and laws related to alternative fuels and advanced vehicles, select a state from the map or menu below. For examples of incentives and laws developed on a local level and that apply to cities and counties instead of an entire state, learn about local incentives and laws.

http://www.afdc.energy.gov/laws/state
AFDC STATE RESOURCE DIRECTORY

California Incentives and Laws
Listed below are incentives, laws, and regulations related to alternative fuels and advanced vehicles for California. Your Clean Cities coordinator at your local coalition can provide you with information about grants and other opportunities. You can also access coordinator and other agency contact information in the points of contact section.

Information in this list is updated annually after California’s legislative session ends. Last Updated May 2011

State Incentives
- Hybrid Electric Vehicle Purchase Vouchers
- Plug-in Hybrid and Zero Emission Light-Duty Vehicle Rebates
- Alternative Fuel and Vehicle Research and Development Incentives
- High Occupancy Vehicle (HOV) Lane Exemption
- Alternative Fuel Vehicle (AFV) and Fueling Infrastructure Grants
- Emissions Reductions Grants
- Heavy-Duty Vehicle Emissions Reduction Grants
- Natural Gas Vehicle (NGV) Home Fueling Infrastructure Incentive - South Coast
- Low Emissions School Bus Grants
- Alternative Fuel and Advanced Technology Research and Development
- Advanced Transportation Financing
- Compressed Natural Gas (CNG) Tax Exemption for Transit Use
- Vehicle Emissions Reduction Grants - Sacramento
- Employer Invested Emissions Reduction Funding - South Coast
- Technology Advancement Funding - South Coast
- Low Emission Vehicle Incentives and Technical Training - San Joaquin Valley
- Air Quality Improvement Program Funding - Ventura County

Utility/Private Incentives
- Electric Vehicle Supply Equipment (EVSE) Incentive - Coulomb Technologies
- Electric Vehicle Supply Equipment (EVSE) Rebate - LADWP
- Electric Vehicle Supply Equipment (EVSE) Incentive - ECOTality
- Alternative Fuel Vehicle (AFV) and Hybrid Electric Vehicle (AFV) Insurance Discount
- Electric Vehicle (EV) Charging Rate Credit - SMUD
- Electric Vehicle (EV) Charging Rate Reduction - LADWP
- Electric Vehicle (EV) Charging Rate Reduction - SCE
- Clean Vehicle Electricity and Natural Gas Rate Reduction - PG&E
- Electric Vehicle (EV) and Natural Gas Infrastructure Charging Rate Reduction - SDG&E
- Natural Gas Rate Reduction - SoCalGas
- Refuel Volume Rebate Program - Propel Fuels
Local Incentives and Laws

There are a variety of local incentives and laws that support reducing U.S. petroleum consumption by encouraging or requiring individuals and/or public and private organizations to use alternative fuels, advanced vehicles, and strategies to decrease fuel use or increase fuel economy. Local city and county governments create such incentives and laws to ensure people use vehicles and transportation fuels safely and efficiently.

The featured incentives and laws below are a small sampling of existing incentives and laws that local governments have created. For specific incentives and laws in your area, contact your local government.

Incentives
- Vehicle Purchase & Infrastructure Development Incentives
- Fuel Use Incentives
- Parking Incentives
- Technical Assistance

Laws and Regulations
- Vehicle Acquisition Requirements
- Promotion Initiatives
- Decline Reduction Requirements
- Renewable Fuels Mandates & Standards
- Infrastructure Requirements

http://www.afdc.energy.gov/laws/local#1
# All Laws and Incentives Sorted by Type

The tables below summarize the number of clean transportation laws, regulations, and funding opportunities in a particular jurisdiction. By selecting the tabs above the table, you can view summary information by technology/fuel, incentive, regulation, or user type.

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Technology/Fuel</th>
<th>Incentive</th>
<th>Regulation</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>29</td>
<td>26</td>
<td>22</td>
<td>21</td>
</tr>
<tr>
<td>Alabama</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Alaska</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Arizona</td>
<td>7</td>
<td>6</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Arkansas</td>
<td>5</td>
<td>4</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>California</td>
<td>15</td>
<td>12</td>
<td>25</td>
<td>17</td>
</tr>
<tr>
<td>Colorado</td>
<td>7</td>
<td>9</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Connecticut</td>
<td>5</td>
<td>4</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Delaware</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Dist. of Columbia</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Florida</td>
<td>9</td>
<td>10</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

AFDC PROJECT ASSISTANCE

Alternative Fuels Data Center

Project Assistance

Through a nationwide network of local coalitions, Clean Cities provides project assistance to help stakeholders in the public and private sectors deploy alternative and renewable fuels, idle-reduction measures, fuel economy improvements, and emerging transportation technologies.

Projects undertaken by Clean Cities coalitions and stakeholders result in significant environmental, economic, and energy security benefits. For examples of project successes, explore alternative transportation case studies.

Clean Cities is the deployment arm of the U.S. Department of Energy's (DOE) Vehicle Technologies Program.

Connect With a Coalition

Contact a Clean Cities coalition coordinator in your area or a DOE regional manager for assistance with your projects to deploy alternative fuels and advanced vehicles.

- Networking Opportunities: Clean Cities coalitions help stakeholders network to learn from one another's experiences and identify potential project partners. Stakeholders include businesses, fuel providers, utilities, vehicle fleets, state and local government agencies, industry partners, and community organizations.

- Technical Assistance: Clean Cities offers technical assistance and individual consultation to help stakeholders overcome obstacles to deploying alternative fuels and advanced vehicles. Many coalitions offer training and workshops to educate stakeholders about the latest technologies and practices.

- Project Funding: Clean Cities coalitions can help identify funding to support transportation projects. Learn about Clean Cities financial opportunities.

http://www.afdc.energy.gov/project_assistance.html
MORE INFORMATION RESOURCES

SUBSCRIBE

– “Clean Cities Now” & local coalition newsletters (free)
  http://www.afdc.energy.gov/cleancities/ccn/

– “National Idling Reduction Network News” monthly (free)
  Email “subscribe” to: tlevinson@anl.gov

– “Fleets & Fuels” bi-weekly e-newsletter ($397/yr)
  http://www.fleetsandfuels.com/
# National Idling Reduction Network News

## July 2012

### Solicitations for Funding and Awards

[Brown text indicates a new entry, or updated information, since last month.]

<table>
<thead>
<tr>
<th>Organization</th>
<th>Project</th>
<th>Funding</th>
<th>Deadline</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay Area Air Quality Management District (BAACMD)</td>
<td>Carl Moyer Memorial Air Quality Standards Attainment Program</td>
<td>$14 million</td>
<td>First come, first served.</td>
<td><a href="http://www.baacmd.gov/?sc_itemId=E0BF9594F-BF34-4A2A-8D38-9A3D00CFF8F8">Link</a></td>
</tr>
<tr>
<td>Cascade Sierra Solutions</td>
<td>Shorepower Truck Electrification Project (STEP) Rebate Program</td>
<td>Rebates for battery HVAC systems are the only remaining</td>
<td>First come, first served.</td>
<td><a href="https://csswebform.org/WebForm/TSE_homenew_add">Link</a></td>
</tr>
<tr>
<td>North Carolina Department of Environment and Natural Resources</td>
<td>2011 Idle Reduction Devices Rebate Program</td>
<td>$50,000 (as of July 10, 2012)</td>
<td>First come, first served, but no later than September 30, 2012.</td>
<td><a href="http://dags.state.nc.us/motor/Rebates/">Link</a></td>
</tr>
<tr>
<td>California Air Resources Board (CARB)</td>
<td>On-Road Heavy-Duty Vehicle Loan Program</td>
<td>~$48 million for loan guarantees</td>
<td>Rolling deadline until funds are awarded.</td>
<td><a href="http://www.arb.ca.gov/oarloan/onroad/documents/fdyloanprogram.pdf">Link</a></td>
</tr>
<tr>
<td>Minnesota Pollution Control Agency</td>
<td>Small Business Auxiliary Power Unit (APU) Loan Program</td>
<td>$110,000</td>
<td>Rolling deadline until funds are awarded.</td>
<td><a href="http://www.pca.state.mn.us/index.php/topics/small-business-environmental-assistance-program/small-business-embodiments/small-business-auxiliary-power-unit-apu-loan-program.html">Link</a></td>
</tr>
<tr>
<td>Metropolitan Washington Council of Governments (COG), in collaboration with the District Department of the Environment, the District Department of Transportation, and the Maryland Department of the Environment</td>
<td>Driver Recognition Program—Diesel Idle Reduction Campaign</td>
<td>N/A</td>
<td>Rolling deadline—the 15th of every month.</td>
<td><a href="http://www.turnyoureneff.org/campaign_recognition.html">Link</a></td>
</tr>
</tbody>
</table>
PREPARE

• Identify needed funding, equipment, vehicles
• Draft equipment specifications
• Obtain cost estimates
• Calculate and quantify emission reductions
• Consult previous successful grantees
• Obtain DUNS Number (http://fedgov.dnb.com/webform)
• Register with SAM (https://www.sam.gov/portal/public/SAM)
• Clean Cities (!)

START NOW!!!
NEW! NEW! NEW!

For federal grants:

Central Contractor Registration (CCR) is now the “System for Award Management” (SAM)
NEW! NEW! NEW!

https://www.sam.gov/portal/public/SAM
EXISTING CCR REGISTRANTS

FORMER CCR REGISTRANTS

If you had an active record in CCR, you have an active record in SAM. You do not need to do anything in SAM at this time, unless a change in your business circumstances requires a change in SAM in order for you to be paid or to receive an award. SAM will send notifications to the registered user via email 60, 30, and 15 days prior to expiration of the record. You can search for registered entities in SAM by typing the DUNS number or business name into the search box.
NOTIFICATION UPON EXPIRATION

System for Award Management: Announcement

Additional information about SAM transition

Please note that CCR and ORCA registrations that were set to expire between July 15 and October 15 have been extended 90 days, so there is no action needed at this time. If you have a registration in CCR/FedReg or have completed representations and certifications in ORCA, all your information is being moved to SAM. When it is time to renew, SAM will notify you by email (60, 30, and 15 days prior to the date when your record is set to expire) and tell you how to proceed. If you need to update your record before your expiration date, the quick start guides and webinars in the Help tab of SAM.gov will walk you through the process.

Government staff members who use SAM from a government IP address will automatically have access to SAM For Official Use Only (FOUO)-level data (equivalent to Proprietary in CCR) without having to register for a SAM account. If you were a CCR Tools user who had Sensitive-level access, you will have the opportunity to migrate those permissions to SAM when you go through the process of creating a SAM account.

SAM.gov contains quick start guides, webinars, a User Guide and other materials that provide all the information you need to get started using SAM. For other questions, beginning Monday, July 30, the help desk for SAM will be the Federal Service Desk (FSD). You can reach them at FSD.gov.
CONVERT CCR TO SAM

Quick Start Guide for Migrating Roles

You can migrate your legacy system roles to SAM

What is an Entity?

In SAM, your company/business/organization is now referred to as an "Entity.

- All of your entity’s data in the legacy systems (CCR, ORCA, EPLS, FedReg) will be migrated to SAM. You can migrate your individual roles upon logging into your SAM account.

Your Roles Will Migrate to SAM

You will have the same access to your data in SAM that you had in the legacy systems.

- You will need to create a new username and password.
- This new SAM username and password will work for all of your migrated roles.

Migrating Roles from Phase One Systems

You can migrate roles from CCR, EPLS and FedReg but not ORCA.

- The Reps and Certs data for your entity will be migrated to SAM.
- SAM has combined the CCR and ORCA functionality. When you migrate your CCR account, you will be given access to your organization’s Reps & Certs.
- If you have multiple accounts in one legacy system, you may find that you won’t need all those accounts to do the same business in SAM. You can migrate the roles connected to those accounts into your single SAM user account.

Access to Your Legacy Email Accounts

To migrate your legacy account (CCR, FedReg, or EPLS), you need the email address used for your legacy account.

- SAM uses your legacy email address to validate who you are.

Steps for Migrating Your Roles

1. Go to www.sam.gov
2. Create an Individual Account and Login
3. To begin the migration process click either:
   - “Yes” next to “Would you like to migrate a legacy system account?” on the “My SAM” welcome banner, or
   - “Migrate Legacy System Account” under “Manage My User Roles” on your “My SAM” page.
4. Select the legacy systems where you have accounts
5. SAM checks to see if your SAM account email address matches your legacy account email address.
   - If YES, your legacy roles will be automatically migrated to SAM
   - If NO, SAM will send an email to your legacy account email address. Click the link in the email and log back in using your SAM username and password. Your roles will now be active.

How do I get more information? Take a look at the SAM User Guide.

Go to Our Website: www.sam.gov
Contact the SAM Help Desk: www.fbo.gov

RESEARCH FUNDING PROVIDER

- Attend grant workshops and meetings
- Make yourself known to funding provider
- Review previous successful proposals
- Review previous funding solicitations
- Identify solicitation areas that match your needs
- Tailor your proposal to match solicitation
- Clean Cities (!)
PROPOSAL WRITING

- Keep it simple and easy to follow
- Follow solicitation sequence
- Include ALL requested data
- Stick to solicitation parameters
- Explore collaborations/look for synergies
- Emphasize unique qualities
- Seek third party input- **Clean Cities**
BE PREPARED TO CALCULATE EMISSIONS

• http://www.epa.gov/cleanenergy/energy-resources/calculator.html
• http://www.afdc.energy.gov/afdc/vehicles/ emissions.html
• http://www.fueleconomy.gov/feg/findacar.htm
• http://www.epa.gov/otaq/stateresources/tools.htm
• http://www.arb.ca.gov/msprog/bus/manualcalc.htm
• http://www.arb.ca.gov/msprog/onrdiesel/compliance tool.htm
• http://www.arb.ca.gov/msei/onroad/ latest_version.htm
• http://www.arb.ca.gov/msprog/onroad/cert/cert.php
• http://greet.es.anl.gov/carbon_footprint_calculator
• http://greet.es.anl.gov/
### 2009 AVAILABLE GRANT AWARDS

- **$300 million** Department of Energy/ARRA
- **$156 million** EPA/National Clean Diesel Funding
- **$30 million** EPA/SmartWay Clean Diesel
- **$25.6 million** EPA/Emerging Technologies Clean Diesel
- **$23.3 million** CA Energy Commission AB118
- **$19 million** CA Energy Commission AFV production
- **$20.4 million** CA Air Resources Board HVIP vouchers
- **$4.1 million** CA Air Resources Board AFVIP rebates
- **$7 million** Reformulated Gasoline Settlement Fund
- **$20 million** Bay Area AQMD TFCA program
- **$31 million** MTC Innovative Grants (GHG reduction)
SUCCESS!
SUCCESS!
WHAT IF YOU ARE NOT SUCCESSFUL?
FOLLOW-UP EVEN IF NOT SUCCESSFUL

• Send thank you to grant provider
• Ask for recommendations for improvement
• Review successful proposals
• Remain in contact with grant provider
• Consult successful applicants
• Seek third party input- **Clean Cities (!)**
Vehicle Leasing

- Common in private industry
- Fresh interest by public/municipal fleets
- No capital expenditure
- Programmable lifecycles
- Tax credits could be a factor
- Check with lease providers
Extra Credit!

Don’t Overlook Tax Credits/Rebates

- PEV’s- IRS Form 8834/8936/8910
- Infrastructure- IRS Form 8911?
- Alternative fuels?
- Changes frequently

Tips:
- Include as specific language in contract or specifications
- Discuss with potential bidders PRIOR to going out to bid
- Leasing companies may be able to pass savings on to you in lease
- Read and become familiar with IRS instructions
Qualification Plug-In Electric Drive Motor Vehicle Tax Credit
Successful bidder agrees to take the Internal Revenue Service (IRS) Qualified Plug-In Electric Drive Motor Vehicle Tax Credit of $________ on behalf of purchaser in accordance with IRS Form 8936 and will offer a vehicle purchase discount of $________ for each _________________ vehicle purchased.

Yes______No_______

TIP:
Request a discount of less than the full tax credit amount
Exception. If you are the seller of a qualified plug-in electric drive motor vehicle to a tax-exempt organization, governmental unit, or a foreign person or entity, and the use of that vehicle is described in section 50(b)(3) or (4), you can claim the credit, but only if you clearly disclose in writing to the purchaser the amount of the tentative credit allowable for the vehicle (from line 6 of Form 8936).
More resources on following slides:

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More resources on following slides:
EXAMPLE 1- DOE/ARRA GRANT

- Source- Federal DOE/ARRA funding solicitation
- Notice- Clean Cities, fleet publications
- Criteria- Alternative fuel vehicle/station/education
  - Governmental entity/partnership
  - Emissions reduction
  - Petroleum fuel displacement
- Project- Construct 75 biofuel stations in California
- Partners- Propel Fuel & CA State General Services
- Award- $6.9 million DOE/$4 million CA Energy Commission
- Notes- $16 million cost share, jobs, shovel ready, quantify
- Status- Project started, 9 stations constructed in 2010
EXAMPLE 2- RGSF CY PRES GRANT

• Source- Reformulated Gasoline Settlement Fund (cy pres)
• Notice- Clean Cities
• Criteria- Fuel or air emissions benefits to CA consumers
  – Non-profit organizations or partnerships
  – Emissions reduction
  – Petroleum fuel use reduction
• Project- Altamont CNG station to fuel CNG refuse trucks
• Partners- Waste Management/Linde North America
• Award- $500,000
• Notes- $600,000 cost share, school age/elderly, quantify
• Status- In contract, to be completed by 2012
EXAMPLE 3- AIR DISTRICT CLEAN AIR FUND

- Source: Yolo/Solano Air Quality Management District
- Notice: Clean Cities
- Criteria: Reduce emissions from motor vehicles
  - Entity within district boundaries
  - Clean technology/low emission vehicles or fuels
  - Alternative transportation/transit programs or public education
- Project: 6 NEV's replacing gasoline vehicles
- Partners: University of California, Davis sole applicant
- Award: $42,000
- Notes: $66,000 cost share, cost effective, quantify
- Status: 6 vehicles fielded
LINKS

- **Federal**
  - [http://www.fbo.gov](http://www.fbo.gov)
  - [http://www.recovery.gov](http://www.recovery.gov)

- **DOE specific**
  - [http://www.energy.gov/recovery/funding.htm](http://www.energy.gov/recovery/funding.htm)
  - [http://www1.eere.energy.gov/wip/eecbg.htm](http://www1.eere.energy.gov/wip/eecbg.htm)
  - [http://www.energy.gov/recovery/index.htm](http://www.energy.gov/recovery/index.htm)
  - [http://www1.eere.energy.gov/recovery/](http://www1.eere.energy.gov/recovery/)

- **Alternative Fuels Data Center**

- **State Organizations**
  - **State Energy Offices**
    - [http://www.naseo.org/members/states/default.aspx](http://www.naseo.org/members/states/default.aspx)
  - **Metropolitan Planning Organizations**
American Public Works Association (APWA)
http://www.apwa.net/

National Conference of State Fleet Administrators (NCSFA)
https://www.ncsfa.net/

NAFA Fleet Management Association
http://www.nafa.org/

Association of Equipment Management Professionals (AEMP)
http://www.aemp.org/

Rocky Mountain Fleet Managers Association (RMFMA)
http://www.rmfma.org/
NATIONAL BIODIESEL BOARD (NBB)
http://www.biodiesel.org/

ETHANOLRETAILER.COM
http://www.e85fuel.com/index.php

ALTERNATIVE FUEL PRICING
http://www.eere.energy.gov/afdc/price_report.html
http://gasprices.mapquest.com/index.jsp

BAF TECHNOLOGIES- EPA/CARB, CNG/LPG (Ford & GM)
http://www.baftechnologies.com/index.htm

BAYTECH CORP- EPA/CARB, CNG/LPG (mostly GM)
http://www.baytechcorp.com/

CONVERSION AND OTHER VENDORS IN GENERAL
http://www.eere.energy.gov/afdc/progs/related2.php
DOE
http://www1.eere.energy.gov/cleancities/
http://www.doe.gov/energyefficiency/transportation.htm
http://www1.eere.energy.gov/vehiclesandfuels/

EPA
http://www.fueleconomy.gov/

Alternate Fuel Vehicle Institute (AFVi)
http://www.afvi.org/

HybridCars.com
http://www.hybridcars.com/frontpage

NGVC
http://www.ngvc.com/