APPENDIX C:

PLANNING PROCESS RESOURCES

SAMPLE KICK-OFF MEETING AGENDA

[Community, State]
EV Roadmap Kick-off Meeting Agenda

[Date]

Discussion Topics

1) **Welcome & Introductions:** Introduce the project management team, including each person's role and background.

2) **Roles & Responsibilities:** Define the project teams and the tasks each will be responsible for. As an example:

   a. Project Management Team - A small team of municipal staff responsible for project coordination and deliverables.

   b. Stakeholder Team – The larger planning team that provides input during planning workshops. A preliminary list of community stakeholders should be identified at the kick-off meeting.

3) **Schedule/Approach:** Review the planning process schedule including preliminary timing of planning workshops and roadmap approval.

   a. Schedule workshops and PM team meetings

   b. Sample 4-month timeline

   - Month 1: Data Collection & Analysis, stakeholder recruitment
   - Month 2: Workshop #1
   - Month 3: Workshop #2
   - Month 4: Finalize and adopt/approve roadmap

4) **First Workshop Logistics:** For planning processes with a fast timeline, it can be useful to schedule the first workshop during the kick-off meeting.

   a. Date/Time

   b. Location

   c. Refreshments

5) **Community Background and Data:** Determine the data to be gathered to inform the community baseline and decide who will be responsible for requesting and processing data. See step 2 for more details.

6) **Additional topics/questions**

EXAMPLE STAKEHOLDER RECRUITMENT LETTER

[Publish Date]

Dear [Stakeholder Name],

[Community Name] is working to develop an Electric Vehicle (EV) Roadmap to help the [community name] meet its EV goals. The roadmap will help the [community name]:

- Understand the current state of EVs in our community and across the country
- Develop a vision of what the future of EVs looks like in [community name]
- Set goal(s) for EV adoption, to support the identified vision
- Determine the areas of EV adoption that are of highest importance to the community
- Identify and prioritize strategies to promote EV adoption

You have been identified as a member of the community who may have an interest in and/ or expertise to offer this process. As such, we would like to extend to you an invitation to participate on an advisory committee to help develop our plan. This will entail attendance at 2 facilitated workshops over a 4-month period to help us develop goals, strategies, and a plan of action.

If you have questions about the program or would like to discuss your involvement on the planning committee, please contact me at the email address below.

Thank you for your time. Please share your availability so we can schedule our first workshop to launch this exciting opportunity for [community name].

Sincerely,

[SIGNATURE]

[COMMUNITY LEAD NAME]

SAMPLE WORKSHOP 1 AGENDA

[Community, State]
EV Roadmap Workshop 1 Agenda
[Date]
Discussion Topics

1. Welcome, Introductions, & Project Grounding (30 minutes)
2. Baseline Data Summary (15 minutes)
3. Vision Exercise (45 minutes)
4. Preliminary Goal Review (30 minutes)
5. Break (15 minutes)
6. Focus Area Framework (15 minutes)
7. Strategy Brainstorming (45 minutes)
8. Wrap-Up & Next Steps (5minutes)

SAMPLE WORKSHOP 2 AGENDA

[Community, State]
EV Roadmap Workshop 2 Agenda
[Date]
Discussion Topics

1. Welcome (10 minutes)
2. Vision Statement (10 minutes)
3. Focus Areas (15 minutes)
4. Strategy Prioritization (10 minutes)
5. Break (10 minutes)
6. Finalize Strategies (30 minutes)
7. Work Plan Activity (30 minutes)
8. Break (10 minutes)
9. Goal Review (10 minutes)
10. Target Setting (35 minutes)
11. Wrap-up and next steps (10 minutes)

SAMPLE PLAN OUTLINE

[Community, State]

EV Roadmap Plan Outline

1. Executive Summary – Summarizes the plan and outlines the vision, goals, and strategies.

2. Acknowledgements – Lists stakeholders and all other significant contributors to the plan.

3. Introduction

   a. Electric Vehicles 101 – Provides general information about EVs from types of vehicles, types of chargers, and necessary infrastructure.

   b. Why an EV Roadmap? – Supports the development of the plan in the larger context of the nation, state, and community.

   c. The Planning Process – Details the collaborative process between the stakeholders and planning team in the development of the plan.

   d. Vision and Goals – Presents the vision and goals guiding the plan.

4. Baseline – Establishing the starting point for the community to use for benchmarking in terms of characteristics, vehicle data, and greenhouse gas emissions data.

5. Focus Areas and Strategies – Describes the focus areas and strategies the community will use to achieve the desired goals as well as a workplan to guide for implementation.

6. Work Citied – Compiles all sources cited in the plan.

7. Appendix A – Contains all supporting data and information

ELECTRIC VEHICLE BASELINE SURVEY

Adapted from the Plug-In Electric Vehicle Community Readiness Scorecard, developed by the National Renewable Energy Laboratory (Rubin, 2013).

Education and Outreach

1) Does your area host a website for the general public that provides local information about electric vehicles (EVs) and charging infrastructure?

    a) Yes

    b) No

Comments:

2) Do your outreach efforts make use of available educational resources for EVs, such as the Alternative Fuels Data Center website, FuelEconomy.gov, or local coalition websites?

    a) Yes

    b) No

Comments:

3) Is your area connected with a national outreach program to encourage the use of EVs (such as Clean Cities or National League of Cities)?

    a) Yes

    b) No

Comments:

4) Are educational efforts in your area coordinated at the regional or state level?

    a) Yes

    b) No

Comments:

5) Is there electric vehicle supply equipment (EVSE) installer training or certification programs available for electricians in your area?

    a) Yes

    b) No

Comments:

6) Has there been a Ride and Drive Event hosted in your area?

    a) Yes, we have them regularly.

    b) Yes, we have done at least one.

    c) No, but we have plans to do one in the future.

    d) No, we have not and do not have current plans to do one.

Comments:

7) Are you conducting targeted EV outreach campaigns? Select all that apply.

    a) No

    b) Yes - Multifamily developments

    c) Yes - Employers

    d) Yes - Low-income residents

    e) Yes - Other

Comments:

8) Does your area offer a tax incentive, grant, or rebate to purchase highway certified, EVs? If yes, indicate the maximum amount allowable per vehicle.

    a) No

    b) Less than $1000

    c) $1001 to $2000

    d) $2001 to $3000

    e) More than $3000

Comments:

9) Does your area have a tax incentive, grant or rebate for residential of public charging equipment? If yes, indicate the maximum allowable per installation.

    a) No

    b) Less than $250

    c) $251 to $500

    d) $501 to $750

    e) More than $750

Comments:

10) Does your area have any attractive financing or special purchase options for EVs or EVSE?

    a) Yes

    b) No

Comments:

Public Access

11) What low-cost or nonmonetary incentives for EVs does your area offer? Select all that apply.

    a) Free parking

    b) EV-specific parking

    c) Exemption from vehicle testing (e.g., emissions)

    d) HOV lane access or bypassing taxi queues

    e) Free charging

    f) Reduced licensing or registration fees

Comments:

12) Has a charging demand analysis study been conducted in your area?

    a) Yes.

    b) No, but we have one planned.

    c) No.

Comments:

13) Does an EV-specific car share or ride hailing program exist in your area?

    a) Yes.

    b) No.

Comments:

14) Are local establishments offered incentives to allow public charging outside their properties?

    a) Yes.

    b) No.

Comments:

15) Is public equity considered when developing public infrastructure (such as proximity to residents with low availability for at-home charging?

   a) Yes

   b) No, but we are planning to include it in future plans.

   c) No

Comments:

16) How is public EV infrastructure promoted and enforced? Select all that apply.

   a) EV-only parking

   b) Standardized signage and regulations

   c) Locations listed on websites and apps

   d) Others?

Comments:

Light and Heavy-Duty Fleet

17) Does your area have a municipal electrification plan (considering vehicle replacement, infrastructure, etc.)?

   a) Yes, for both light and heavy-duty fleets.

   b) Yes, for light duty fleet only,

   c) Yes, for heavy-duty fleet only.

   d) No.

Comments:

18) Has an EV feasibility inventory been conducted in your area?

   a) Yes, for both light and heavy-duty fleets.

   b) Yes, for light duty fleet only,

   c) Yes, for heavy-duty fleet only.

   d) No.

Comments:

19) Have sites for charging been identified (either criteria for the sites or actual locations)?

   a) Yes, for both light and heavy-duty fleets.

   b) Yes, for light duty fleet only,

   c) Yes, for heavy-duty fleet only.

   d) No.

Comments:

20) Are any of the following employee engagement opportunities offered in your area? Select all that apply

    a) Vehicle type training

    b) Charging station training

    c) Involvement in planning process

    d) Employee incentive program

    e) Others?

Comments:

21) Are there any procurement standards in place? Select all that apply.

    a) Vehicle types

    b) Charging station types

    c) Group buy offerings

    d) Others?

Comments:

Utility Coordination

22) Do utilities in your area have a program in place to address grid infrastructure requirements and operational impacts of charging for EVs?

    a) Yes

    b) No

Comments:

23) Do utilities in your area offer a separate rate for EVs?

    a) Yes

    b) No

Comments:

24) Do utilities in your area offer any tools to help the consumer understand the costs and benefits of EVs under different rate structures?

    a) Yes

    b) No

Comments:

25) How engaged are the utilities in local efforts to deploy EVs and charging infrastructure (for example, participation in planning efforts, working with local jurisdictions to understand building permitting and codes or working with public utility commissions on how to help with EV rollouts)?

   a) Not engaged

   b) Somewhat engaged

   c) Moderately engaged

   d) Highly engaged

Comments:

26) Have the utilities in your area analyzed the impacts of EVs on the local grid or forecasted the location of potential EV concentrations?

   a) Yes

   b) No

Comments:

Policy

27) In your area, what is the average time it takes for an EVSE owner or site manager to complete the permitting, installation, and, if applicable, inspection process?

   a) Less than 1 day

   b) 1 week

   c) 1 to 2 days

   d) 2 days to 1 week

Comments:

28) What are the options for submitting an EVSE permitting application? Select all that apply.

   a) Online

   b) Snail mail

   c) In person

   d) By telephone

Comments:

29) Indicate all the types of EVSE installation permit applications you have that are separate from general electrical work permit applications.

    a) Residential

    b) Commercial/workplace

    c) Public

    d) Fast charger

    e) None

Comments:

30) How is information describing the permitting process made available? Select all that apply.

    a) Online Training sessions

    b) Telephone hotline

    c) Other/not available

    d) Print publications

Comments:

31) Is there an accessible, designated point of contact for questions about the EVSE permitting process?

    a) Yes

    b) No

Comments:

32) What is the average fee for a residential EVSE permit and inspection in your area? If your area charges a separate fee for these two services, add the two together.

    a) $0-50

    b) $51-100

    c) $101-300

    d) $301-500

    e) More than $500

Comments:

33) What is the average fee for a commercial EVSE permit and inspection in your area? If your area charges a separate fee for these two services, add the two together.

    a) $0-50

    b) $51-100

    c) $101-300

    d) $301-500

    e) More than $500

Comments:

34) Have permitting inspectors in your area been trained on the specifics of EVSE installations?

    a) Yes

    b) No

Comments:

35) Does your area have any existing policies that benefit EVs and infrastructure use (for example, local fleet mandates to use EVs, low carbon fuel standards, greenhouse gas emission regulations, planning/zoning requirements for new construction to include EVSE provisions, etc.)?

    a) Yes

    b) No

    c) No, we have laws that restrict EVs

Comments:

36) Are there any future laws, policies, or incentives pending or planned that would affect the deployment of EVs?

    a) Yes, there are laws or incentives that encourage EVs.

    b) No.

    c) No, there are proposed policies that restrict EVs.

Comments:

37) Have EV considerations been incorporated into local/regional planning efforts?

    a) Yes, we have coordinated with surrounding entities to align on EV laws and policies.

    b) We are in the process of coordinating efforts.

    c) No.

Comments:

38) Are there local codes that accommodate EV (such as charging codes, street codes, building codes, parking codes)?

    a) Yes, we have EVs integrated into all municipal codes.

    b) Yes, we have EVs integrated into some municipal codes.

    c) No, but we plan to integrate EVs into the codes in the future.

    d) No, we have codes that restrict EVs.

Comments:

39) Are there policies that regarding the placement of public charging stations?

    a) Yes

    b) No

Comments: