

Plug-In Thunder Bay Applicant's Guide

1.1 Description and Objective of the Program

The Pan-Canadian Framework on Clean Growth and Climate Change was introduced on December 9, 2016, as a roadmap to assist Canada's federal and provincial governments to achieve a 2030 target of a 30% reduction below 2005 levels of greenhouse gas emissions for the country as a whole.

Since transportation accounts for a quarter of Canada's greenhouse gas emissions, of which almost half comes from cars and light trucks, the Government of Canada is steadfast in its belief that a shift to cleaner energy sources in transportation is a key part of Canada's transition to a low carbon economy. This is why the Government of Canada set ambitious federal targets of zero-emission vehicles (ZEVs), reaching 10% of light-duty vehicles sales per year by 2025, 30% by 2030, and 100% by 2040.

The Plug-in Thunder Bay objective is to address the lack of charging and refueling stations in Thunder Bay, one of the key barriers to ZEV adoption, by increasing the availability of localized charging opportunities where Canadians live, work, and play.

1.2 Purpose of this Program

This Program is seeking applications from ultimate recipients to distribute funding to install electric vehicle charging infrastructure projects in public places, on-street, in multi-unit residential buildings, at workplaces, or for light-duty vehicles fleets.

Public Places:

Public places are defined as parking areas intended for public use. Parking areas can be privately or publicly owned and operated. Examples of public places include, but are not limited to service stations, retail, restaurants, arenas, libraries, medical offices, parks, and rides, etc.

On-Street:

On-street charging is considered curbside charging infrastructure for public use and is managed by local governments.

Workplaces:

A workplace is defined as a location where employees perform duties related to a job. Charging infrastructure must be primarily used by the employees. Charging infrastructure installations at a private residence, even if a business is registered at the same address, are not included in this category.

Light-Duty Vehicle Fleets:

A light-duty vehicle is considered to have a gross vehicle weight rating (GVWR) of less than or equal to 3,856 kg. Light-duty fleet vehicles are owned or leased by an organization and used in support of organizational or business operations and activities. Light-duty vehicle fleets are composed of multiple vehicles and are managed by common ownership. Examples of light-duty vehicle fleets include a fleet of taxis, car rentals, municipal vehicles, car sharing, etc.

Multi-Unit Residential Building (MURB):

MURB charging is defined as infrastructure in parking spaces where people live. For the purpose of this program to be designated as a MURB, the building must include a minimum of three (3) dwelling units.

1.2.1 Definitions

The following provides definitions for key terms and expressions used throughout this document.

Charging Connector

Is the plug on the power cord that connects the supply device to the charging outlets on the electric vehicle.

Charging Station

Is the device used to provide electricity to an electric vehicle for the purpose of charging the vehicle's onboard battery.

Connected EV Chargers

Defined as having the ability to communicate to other stations and/or to a server or the cloud through cellular/wireless signal or connected vehicle communications using software to report on usage and/or other capabilities such as providing real-time status of charging stations.

Ultimate Recipients

Those organizations that receive a component of the Plug-in Thunder Bay funding from the Thunder Bay Community Economic Development Commission to undertake activities as described in Section 1.7 Eligible Projects. The Ultimate Recipients will be selected by the Thunder Bay Community Economic Development Commission.

1.3 Roles and Responsibilities

1.3.1 Thunder Bay Community Economic Development Commission (CEDC)

The CEDC is responsible for the delivery of a component of the Plug-In Thunder Bay funding. The CEDC has independence in selecting Ultimate Recipients and will not act as an agent of the government in the redistribution of program funding.

1.3.2 Ultimate Recipients

Ultimate Recipients apply for funding through the CEDC to receive a component of the Plug-in Thunder Bay funding. The accountability, roles, and responsibilities of an Ultimate Recipient will be established through a funding agreement between the CEDC and the Ultimate Recipient.

Delivery Organizations are not acting as agents of the Crown and have full independence as to the choice of Ultimate Recipients. To ensure all parties are conducting their projects according to the Program requirements, minimum requirements of the contribution agreement that will be established between the CEDC and its recipients.

1.4 Eligible Recipients

The eligible recipients under this program are Ultimate Recipients defined as Legal entities validly incorporated or registered in Canada, including not-for-profit and for-profit organizations such as:

- Electricity or gas utilities
- Companies
- Industry associations
- Research associations
- Standards organizations
- Indigenous and community groups
- Academic institutions
- Provincial, territorial, regional, or municipal governments or their departments or agencies

1.5 Maximum Funding Amount

The program will fund up to 50% of total project costs, up to maximum amounts as shown in the following table:

Table 1: Maximum funding

Type of Charger	Technology Requirement	Maximum Funding
Level 2 (208 / 240 V) connectors 3.3 kW to 19.2 kW	Any EV charger is commercially available and CSA, ULC, UL or Interlink certified for use in Canada. The charger must have a SAE J1772 standard plug head or be a proprietary** connector type rated for a minimum of 3.3 kW power output.	Up to 50% of total project costs, to a maximum of \$5,000 per connector*
Fast charger 20 kW to 49 kW	Any EV fast charger is commercially available and CSA, ULC, UL or Interlink certified for use in Canada. The fast charger must have at least one (1) charger connector that is CHAdeMO compliant and one (1) charger connector that is SAE Combo or be a proprietary** connector type rated for a minimum of 20 kW power output.	Up to 50% of total project costs, to a maximum of \$15,000 per fast charger
Fast charger 50 kW and above	Any EV fast charger is commercially available and CSA, ULC, UL or Interlink certified for use in Canada. The fast charger must have at least one (1) charger connector that is CHAdeMO compliant and one (1) charger connector that is SAE J1772 Combo (CCS) or be a proprietary** connector type rated for a minimum of 50 kW power output.	Up to 50% of total project costs, to a maximum of \$50,000 per fast charger

* For level 2 charging stations: In order to consider the funding per connector, each connector must be able to charge a vehicle and support a parking space simultaneously. Fast charging station funding is based on the number of chargers.

1.6 Stacking of Assistance

All Ultimate Recipients are required to disclose all confirmed and potential sources of funding, inclusive of all federal, provincial, territorial or municipal governments (total government assistance) and other sources that are expected to be received. This information can be reported at any time during the project or quarterly when progress reports and payment claims are submitted.

Total funding cannot exceed 75% of the total project costs unless the proponent is a provincial, territorial or municipal government or their departments or agencies, in which case the stacking limit is 100% of total project costs.

If the proposed total assistance exceeds the limits set out above, CEDC reserves the right to reduce its contribution to the project until the stacking assistance limit is met. If total assistance exceeds the limits set out above on the project completion date, CEDC

reserves the right to recover the excess contribution from the recipient.

Note: The government assistance referred to in these stacking limits does not include loans from governments or Crown agencies. For example, loans to the project from governments or Crown agencies are not included in this calculation; however, if a preferential interest rate were obtained through government loans, the cost savings due to the preferential rate would be included. Clarifications will be provided on a case-by-case basis.

1.7 Eligible Projects and Technologies

In order to be considered for funding. Ultimate Recipients must meet the following requirements:

- Be an eligible technology as described in Table 1 of this Guide;
- Be located in Canada;
- Be a permanent installation (mounted or fixed models);
- Be new and purchased equipment (not leased);
- Be for a new installation or expansion of an existing installation (not for the replacement of an existing installation);
- Be connected as defined in Section 1.2.1 of this Guide;
- Increase localized charging opportunities in public places, on-street, in multi-unit residential buildings, at workplaces, or for light-duty vehicle fleets, as defined in Section 1.2 of this Guide;
- The work performed must be in compliance with all applicable local codes (for example, building and electrical) and bylaws (for example, zoning and parking);
- Charging infrastructure targeting general public use must be installed in a parking space clearly identified for the purpose of charging electric vehicles; and
- The project timeline must show completion as outlined in the issuance of the funding decision (Letters of Approval). Applicants of successful projects will have two (2) months after the date of the Letter of Approval (LOA) to sign a contribution agreement.

1.8 Application and Project Timelines

Applicants must submit a full application package using the templates provided in the Applicants' Package available on the Program's website.

The following is the Program's schedule.

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Initiate the Program	April 2023
Submission deadline	June 30 th , 2024 or when funds have been committed.
Assessment of applications	Ongoing
Funding decisions, Letters of Approval, and Letters of Regret	Ongoing
Begin negotiation and signature of Contribution Agreement (CA)	Ongoing

Project completion date	The project timeline must show completion by August 31 st ,2024. Applicants of successful projects will have two months after the date of the Letter of Approval (LOCA) to sign a contribution agreement.
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The above schedule is subject to change. Any changes will be communicated to applicants via the Program’s website.

1.9 Eligible Expenditures

Eligible Expenditures for an approved project from an Ultimate Recipient must be directly related to the installation of EV chargers and will include:

- Salary and benefits;
 - Professional services (e.g., scientific, technical, management; contracting; engineering; construction; installation, testing and commissioning of equipment; training; marketing; data collection; logistics; maintenance; printing; distribution);
 - Capital expenses, including informatics and other equipment or infrastructure;
 - Rental fees or leasing costs;
 - License fees and permits;
 - Costs associated with Environmental Assessments; and
 - GST, PST, and HST net of any tax rebate to which the recipient is entitled.
- Costs not considered Eligible Expenditures under this Program include:
- In-kind;
 - Land costs;
 - Legal costs;
 - Ongoing operating costs (e.g., electricity consumption, operation, maintenance, networking fees, subscription fees, etc.), and;
 - Costs incurred outside the Eligible Expenditure Period, including those for preparing this application.

1.10 Period for Reimbursement of Eligible Expenditures

Eligible Expenditures will be eligible for reimbursement from the time that CEDC receives an application until the project completion date stated in the contribution agreement.

Following the project selection, a successful Ultimate Recipient will be notified through a Letter of Approval and be invited to begin negotiating a contribution agreement.

CEDC will not accept any changes to the standard provisions of the contribution agreement template unless there exists a legal impediment of your organization to agree to the terms and conditions of the agreement as drafted.

It is important to consult with the Program during this period prior to incurring expenditures.

In all cases, until both parties sign a contribution agreement there is no commitment or obligation on CEDC's part to make a financial contribution to any project, including any expenditure incurred or paid prior to signing such a contribution agreement.

1.11 How to Apply

A complete application package consists of:

- A completed application form including the Word and Excel documents;
- Supporting documentation;
- An attestation dated and signed by a duly authorized officer.

To fully assess the project, CEDC requests that all additional material in support of the project application be limited to only that is directly relevant to the project.

Applicants are required to submit a single copy of the application package by 4:30 pm Eastern Standard Time, **June 30th, 2024**. The application packages can be submitted to CEDC in digital format. **The application portal may close earlier than June 30th, 2024 if all funds have been committed.**

When an application has been submitted, a notification will be sent by the Program acknowledging its receipt. This may take up to (5) business days.

Note: You should consider your application as successfully received only when you obtain the acknowledgment notice from the Program.

1.11.1 Submission of Proposals

Applicants are encouraged to submit their application by e-mail at:

Jamielee.Kostecki@thunderbay.ca

Any questions or inquiries regarding the Program must be sent by email to:

Jamielee.Kostecki@thunderbay.ca

A written response will be provided within five (5) business days.

The word and excel portions of the applications must be submitted. The attestation page must be printed, signed, scanned and sent as a PDF. Additional supporting documentation, saved as Word, Excel or PDF formats, must also accompany the application and be included as attachments to emails.

CEDC is not responsible for the security of the application during e-mail transmission.

It is the applicant's responsibility to retain the proof of the time that the application package was sent to CEDC. This may be required in the event that CEDC does not receive the application package by the deadline for reasons beyond the sender's control.

2. Project Selection Criteria

2.1 Assessment, Due Diligence, and Risk Framework

Each project application will be reviewed for completeness and assessed against mandatory criteria. Applications that do not meet all the mandatory criteria will not be given further consideration.

Applications that meet the mandatory criteria will be then rated and ranked against merit criteria by a review committee. CEDC will then issue final funding decisions on this ranking and city distribution. Unsuccessful project proposals will receive letters of regret, and successful project proposals will receive Letters of Approval.

Applications that have been conditionally recommended for funding will undergo a due diligence assessment. This assessment will look at the financial strength of a proponent as well as their ability to complete the project. CEDC may request that the applicant provide confirmation or clarification to support their project proposal. An independent firm may be contracted to support the program with this process. If an in-depth financial analysis is required, CEDC will inform the proponent and provide details on the next steps. The findings from the due diligence process will be considered in CEDC's ability to enter into a contribution agreement with a proponent for the proposed project.

If an application is successful and the due diligence assessment results are suitable, the proponent will be invited to negotiate a contribution agreement. The findings from the due diligence assessment could determine risk mitigation strategies that will be included in the contribution agreement (for example, monthly progress reports or percentage of risk holdback). Also, monitoring strategies applied during the conduct of the project could be defined by the risk level identified. In this case, the program would inform the proponent in writing.

3. Mandatory Criteria

The following criteria will be used for CEDC to assess applications to select

Ultimate Recipients. The applications must:

- Be an eligible recipient as per Section 1.4 of this guide.
- Provide a project timeline that shows the project can be completed by August 31st, 2024.
- Demonstrate that the EV chargers will be installed in Canada
- Demonstrate that all EV chargers will be new installations or expansions of existing installations (not for the replacement of an existing installation).
- Demonstrate that all EV chargers installed will be connected as defined in 1.2.1 of the Applicant's Guide.
- Demonstrate that all EV chargers will have multiple connectors. Each connector must be capable of charging a vehicle and support a dedicated parking space simultaneously.
- Demonstrate that all EV chargers that will be installed are certified (CSA, ULC, UL, or Interlink) for use in Canada and commercially available, as well as offer one or more of the following connectors:
 - SAE J1772 standard plug head (Level 2 (208/240v));

- SAE J1772 Combo (fast-EV chargers);
- CHAdeMO (fast-EV chargers);
- Proprietary charging connectors (see Section 1.5 of the Applicant's Guide for details on their eligibility for funding).

4. Merit Criteria

Only applications that meet the mandatory criteria will be evaluated against the merit criteria described below. Therefore, applicants are encouraged to provide a detailed and clear description for each criterion.

4.1 Project Rationale and Background

Describe how your organization's rationale for installing charging stations in public places, on-street, in multi-family buildings, workplaces, or for light-duty vehicle fleets.

Highlight your needs assessment, target users, commitments, strategies, benefits to stakeholders, and expected outcome of your project.

Please describe your business model for operating the charging station and outline its pricing scheme.

4.2 Technical Details of the Project

Outline your methodology on site selection and outline if the selected site meets all the technical needs for the charging stations. If a site does not meet all the technical needs, list the steps to ensure all technical requirements are met.

4.3 Capacity to Deliver Projects

Outline the number, qualifications, and relevant experience of personnel to be assigned to your proposed team. You are to include sufficient resources, and other specialties as applicable, with an adequate balance of proposed senior, intermediate, and technical resources.

4.4 Quality Management

Demonstrate your methodology proposed for the performance of work and include what cost and schedule controls are going to be used.

4.5 Project Budget

Complete the detailed budget template that will estimate all costs that are likely to be incurred before the project is completed. You're to show if you have secured funding from other sources.

4.6 Marketing Plan

Describe your marketing plan for your stations, including signage (parking and directional), whether the charging station will be added to any charging station's locator map, and any promotional activities.

4.7 Operation and Maintenance Plan

CEDC understands the importance of proper operation and maintenance of the charging station equipment. Describe your operation and maintenance plan for your

stations. You're to include elements such as service standards, routine maintenance, customer support service, customer payment options, insurance coverage, etc.

5. Additional Information

5.1 Eligible Expenditures

5.1.1 Salaries

Salaries include wages for all personnel with direct involvement in the project, such as engineers, construction staff, and technical advisers. All eligible personnel must be employees on the proponent's payroll. Payments such as shares, stock, stock options, etc., are not eligible. The amount invoiced shall be actual gross pay for the work performed and shall include no markup for profit, selling, administration or financing.

The eligible payroll cost is the employee's gross pay (normal periodic remuneration before deductions). Normal periodic remuneration rates are the regular pay rates for the period, excluding premiums paid for overtime or shift work. The payroll rate does not include any reimbursement or benefit conferred in lieu of salaries or wages. When hourly rates are being charged for salaried personnel, the hourly rates shall be the periodic remuneration (annual, monthly, weekly, etc.) divided by the total paid hours in the period, including holidays, vacation, and paid sick days.

Labour claims must be supported by suitable documentation such as timesheets and records and be held for verification at the time of audit. Management personnel is required to maintain appropriate records of the time devoted to the project.

5.2.2 Benefits

Benefits are defined as a reasonable prorated share of expenses associated with the direct labour cost, such as the employer's portion of the Canada Pension Plan, Quebec Pension Plan and employment insurance, employee benefits such as health plan and insurance, workers' compensation, sick leave, and vacation, plus any other employer-paid payroll-related expenses. Those items with no relationship to the project or that have been charged on an indirect basis are non-eligible. The determination of the fringe benefit amount shall be in accordance with GAAP. In general, the fringe benefit rate provided in the project estimate shall be computed once during the life of the project and agreed on prior to the signing of the agreement. If retroactive adjustments are made, they must be indicated on claims for progress payments for CEDC approval.

5.2.3. Professional Services

Professional services are defined as costs for the purchase of additional support required for the completion of the project. Those costs can cover the following types of services: scientific, technical, management; contracting; engineering; construction; installation, testing and commissioning of equipment; training; marketing; data collection; logistics; maintenance; printing; distribution; audit and evaluation. The amount eligible from a sub-contractor, a consultant or service provider shall be the actual contract amount, and a copy of the contract must be kept on file.

5.2.4 Capital Expenses

Capital expenses are defined as an expenditure that results in an enduring benefit, as required by the project. They can include but are not limited to the purchase of charging equipment, costs associated with site preparation and networking equipment; however, land is not considered an eligible expenditure under this Program. The retrofitting or upgrading of existing capital assets is included under this heading. GST, PST, and HST any taxes claimed must always be net of any tax rebate to which the proponent is entitled.

6. Contact Information

Applicants are to submit their application by email to:

Jamielee.Kostecki@thunderbay.ca

Any questions or inquiries regarding the program must be sent by email to:

Jamielee.Kostecki@thunderbay.ca

A written response will be provided within five (5) business days.

During the application period, program employees and review committee members are not at liberty to meet or discuss proposed projects with applicants.