

Appendix B Sample Draft Scope of Work

DRAFT Scope and Description of Work

The Grant Recipient is responsible for providing Electric Vehicle (EV) charging hardware, installation services, maintenance, network operations and ongoing provision of EV charging services to consumers at selected host sites along designated corridors in Washington State.

The Scope of Work includes hardware, software and related equipment and infrastructure to install and operate DC Fast-Charging and Level 2 Charging Stations; Site Selection, Design, Engineering, Construction and Installation of the specified Charging Stations; Network Operations; and Maintenance and Support through the Period of Performance (July 1, 2017 through June 30, 2019). Detailed Task Objectives, Deliverables, Timelines, Technical Specifications/Requirements, and Payment Provisions are provided in subsequent sections of this Statement of Work.

Project or Task Objectives and Deliverables

The Grant Recipient will work closely with the Contract Manager and WSDOT management and staff to achieve consensus before proceeding to the next task as outlined in the project requirements. Target dates to accomplish each Task are further detailed Section III below.

1. Site Evaluation, Planning and Acquisition

1.1 Identify Candidate Sites

Using the Host Site Eligibility and Screening Criteria developed by WSDOT and additional factors the Grant Recipient identifies as relevant, the Grant Recipient will survey, screen and make recommendations for candidate host sites to serve as DC Fast-Charge Stations. Grant Recipient will shall give heavy weight to host site owners that propose cost-sharing or other advantageous co-investments in support of electric vehicles. Grant Recipient will coordinate and attend site visits and obtain documentation when required.

Deliverables: Candidate host sites, with supporting data; and site visits as requested or necessary.

1.2 Utility Coordination and Cost Estimating

The Grant Recipient will coordinate all cost estimating, work orders, and interconnection issues with the power utility serving the host site. Cost estimates for any necessary power utility upgrades must be included in the Host Site Feasibility data package presented to WSDOT.

Deliverables: Cost estimates, timelines and other information related to electric power utility upgrades and interconnection work.

1.3 Lease Negotiation and Execution

Grant Recipient shall complete any additional investigations, including but not limited to environmental analysis, traffic and/or engineering feasibility, power interconnection issues, and the financial viability of the proposed host site owner. Upon presentation of these additional details and WSDOT approval, the Grant Recipient shall manage lease negotiations on behalf of WSDOT, and provide WSDOT with an executable lease. Primary leasing considerations should include cost-sharing or co-investments in supporting use of EVs; future opportunities for expansion; long term commitment (restrictive

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termination parameters), value for all parties, project visibility, indemnification and insurance requirements, utility access easements, and ownership of improvements.

Deliverables: Site Feasibility Package that incorporates all site details; and an executable lease for each site location.

1.4 Land Use, Building, Electrical and Environmental Permits

The Grant Recipient shall manage the entitlement process, including land use and building permits. Grant Recipient shall meet with the jurisdictions as needed and attend meetings and hearings when required. Grant Recipient shall coordinate the preparation of application materials required for submittal. Grant Recipient shall collect, organize, and deliver land use and permitting approval documentation and submit this information to WSDOT. Grant Recipient may coordinate and attend site visits association with the preparation and completion of construction related applications as required.

Grant Recipient shall prepare and deliver all zoning and permitting application packages that may be required by state or local jurisdictions. Grant Recipient shall coordinate modifications to any materials, including construction drawings, and submit the package. Grant Recipient shall deliver zoning approvals and completed permits from the governing jurisdiction for the site, and a complete copy of the application package to WSDOT.

Upon completion of all site acquisition tasks, including a fully executed lease, land use approvals and an approved building permit, Grant Recipient shall provide a site book detailing associated materials utilized in the process.

Deliverables: All permit applications and supporting materials; final land use, environmental and building approvals as required; construction, design and engineering drawings necessary to obtain approvals; fully executed lease and site book for each location.

2. Design, Engineering, Construction and Installation

2.1 Design & Engineering

Grant Recipient shall provide all architectural and engineering services supporting site design and the development of approved zoning and construction drawings suitable for land use and permitting submission. Site design should include the site location (including square footage, and longitude/latitude coordinates for GIS database needs), identification of all easements, licenses and other use rights; utility routing, additional meter placement, additional circuit placement; station layout including curbs, wheel stops/bollards, canopy and other structures, and setbacks; designation of any adjoining structures; continuous and sufficient access from the nearest public right-of-way to the premises, underground trenching (if required); landscaping; erosion control; and retaining walls.

Grant Recipient shall prepare land use drawing(s) ("Zoning Drawings") in preliminary and final form, acceptable for submittal to the applicable governing agency. Primary considerations for these drawings may include, but is not limited to: (a) vicinity map, property corners and boundary lines; (b) access road (existing or proposed); (c) elevations; (d) existing and proposed equipment and structural improvements; (e) utility lines and meter locations; (f) legal description of the property; (g) signage and

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lighting; (h) traffic patterns; and (i) any other information submissions required or requested by the government agency. Upon completion of the final zoning drawings, Grant Recipient will provide to WSDOT a hard copy of the final zoning drawings at the size of 11" x 17".

Grant Recipient shall prepare site-specific engineering and construction drawings and specifications ("Construction Drawings"). All Construction Drawings shall be wet stamped by a licensed engineer and prepared for submittal and review by any applicable governmental agency necessary for the construction and operation of the subject site. Grant Recipient shall submit to WSDOT for preliminary approval all construction drawings prior to the appropriate due dates. Upon completion of the final Construction Drawings, Grant Recipient shall provide to WSDOT a copy of the final Construction Drawings in hard copy at the size of 11" x 17". Grant Recipient shall perform minor revisions to the Construction Drawings to accommodate site design modifications required by the application jurisdiction or requested by WSDOT. A major revision is defined as a design change required by the jurisdiction or by WSDOT that requires a level of effort to revise the drawings substantially equivalent to preparing a new drawing.

If required, Grant Recipient shall visit the site and create all required landscaping plans, plant specifications and irrigation plans.

If required, Grant Recipient shall prepare accurate, quality photo simulations of a proposed site for use in obtaining zoning or other approvals as may be required from time-to-time. Photos must be of adequate magnification, size and scale to allow visual interpretation of all critical details necessary for review for zoning and other approvals.

If required, Grant Recipient shall provide surveys as required by the site specific scope of work or as requested by the Host Site Owner or WSDOT. Prior to any survey work being performed, Grant Recipient will gain approval from WSDOT for this additional level of work.

Deliverables: All permit zoning, and construction drawings; and any necessary surveys in support of land use-related permits and construction services.

2.2 Site Preparation

After all land use and building permits have been obtained, Grant Recipient shall make all site preparations in advance of construction activities. Such preparations may include (but are not limited to): traffic and pedestrian controls to ensure public safety; locating and marking utilities; conducting surveys; providing for appropriate environmental controls to prevent erosion, stormwater runoff, etc.; creating protected areas for equipment and materials staging; notifying adjacent property owners of construction activities, if required; etc.

2.3 Construction

The Grant Recipient shall provide all construction-related services and materials necessary to successfully deliver the Scope of Work, including but not limited to: mobilization of work force and materials; saw cutting asphalt or concrete for trench; excavate or trench for conduit and utility pull box; place utility hand hole and conduit; backfilling of trench; placement of forms for poured concrete for meter cabinet, EV-unit, footings for structural improvements/canopy, and other project site requirements such as curbs, wheel-stops, bollards, etc.; pour concrete, patch asphalt and site cleanup;

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installation of EV Charging equipment on cured concrete pad; installation of wheel-stops, bollards, area lighting, beacon signs and canopies where appropriate; installation of meter cabinet and breakers; pull wire and connect power to EV charging equipment; site clean-up and demobilization; etc.

Deliverables: Construction materials and services for all EV Charging sites in quantities and locations as mutually determined based on budget availability.

2.4 Utility Integration

The Grant Recipient shall arrange for, coordinate and oversee the successful integration of all utility connections, including but not limited to transformer upgrades and three-phase power connection from utility power source.

2.5 Installation

Grant Recipient shall install all EV charging equipment and associated structures in locations and quantities as mutually agreed and subject to budget capacity. All installed EV charging equipment, structures and site improvements must be approved by the appropriate permitting and inspection agencies, including electrical inspection.

All installed EV charging station equipment and related site improvements must undergo acceptance testing and validation before WSDOT will deem such stations operationally complete and ready for public use.

Deliverables: Installation of DC Fast-Chargers, Level 2 EVSE and associated structures and site improvements at number of (#) locations

3. Project Management and Reporting

3.1 Project Management

Grant Recipient will provide complete project management, oversight and reporting for all elements related to information technology, equipment provision and performance, installation and construction services, marketing, accounting, production and operations. Grant Recipient is responsible for the timely and on budget performance of all employees, contractor and suppliers.

Grant Recipient will manage and track the project budget against actual and projected expenditures, and provide periodic expenditure-to-budget reports to WSDOT as requested. Management reports must be provided that track compliance and deviations, and identify areas for corrective action. Grant Recipient will provide or allow access to WSDOT to reports that track shipment and follow the progress of individual installations.

Grant Recipient shall maintain frequent and concise communications with WSDOT by establishing response timelines, redundant confirmation procedures, reminder notices, and strong documentation procedures throughout the period of performance.

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Grant Recipient will manage and serve as the point of contact for interaction with Host Site owners/landlords, governing bodies, utilities, and third-party vendors necessary to obtain full entitlement; to develop a program schedule; to coordinate bids, awards, and work efforts of construction contractors and original equipment manufacturers; to coordinate materials delivery; to coordinate utilities and telecommunications; to provide quality control and close-out services in support of this project.

Deliverables: Quarterly expenditure-to-budget reports; project management reports.

3.2 Financial Accounting, ARRA and Other Reporting

At the conclusion of each task outlined in this section, the Grant Recipient will present a written task report to the WSDOT. If the submitted task reports are satisfactory, preliminary approval will be given for work to continue to the next task without delay. Final approval of each task will reside with WSDOT.

Grant Recipient will provide all financial, budget and expenditure information that may be required by WSDOT.

Grant Recipient must provide ongoing information and reporting on the costs to operate each EV charging station, the energy dispensed at each location, and vehicle-related data related to consumer use of the EV charging stations detailed by month. Grant Recipient shall monitor charger performance and fault indications on an ongoing basis and report the same to WSDOT during the full period of performance.

Deliverables: Task reports; financial reporting, including prevailing wage survey data and other reporting data as required by state government; ongoing station operations reports.

4. Operational Acceptance Testing

4.1 Field Test Evaluation and Validation

Before accepting an EV charging station as operationally complete and open for public charging services, Grant Recipient must conduct field tests of the charging equipment and networking functionality. Grant Recipient must prepare a checklist of all equipment functions to test and validate safe and functional operations.

4.2 Point of Sale and Transaction Processing

All EV charging stations to be provided under this contract must support multiple Point-of-Sale methods, including pay per use and subscription methods. No EV charging station can be declared operationally complete until all Point-of-Sale capabilities, including the accurate processing of transactions, back-office support and account management and reconciliation functions, have been validated by Grant Recipient and WSDOT.

4.3 Customer Service Call Center

The customer service call center must prove capable of providing ready customer support to consumers at each EV charging station deployed under this contract. Such services must be provided 24 hours per day, 7 days per week every week of every year during the period of performance. All EV charging

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stations must provide easy identification and instructions for using the Customer Service Call Center. No EV charging stations can be declared operationally complete until such stations include clearly visible instructions for contacting the Call Center, and the Call Center proves capable of providing or dispatching services to each specific EV charging station.

4.4 Web Portal and Information Communication Technology Services

Grant Recipient shall provide Information Communications Technologies including a fully-functioning web portal that is active and ready for use by consumers. The web portal and mobile web portal features must be fully operational and accessible to consumers before the EV charging stations can be declared operationally complete. Grant Recipient shall also provide its EV Data system, to be integrated to communicate with drivers, owners of the public chargers, and with utilities.

5. Training and Software

During the Period of Performance, Grant Recipient must provide all necessary training in station operations, point-of-sale or other transaction-related operations, and any other training necessary for Host site staff to assist consumers in the operation of the charging equipment and the processing of transactions. Grant Recipient must hold such training sessions within a reasonable driving distance from the Host sites, to allow Host site staff from multiple charging station locations to attend the same training session, if Grant Recipient prefers a consolidated training regimen. Grant Recipient is responsible for all costs of training Host Site staff.

6. Operations and Support Services

6.1 Financial Transaction Processing & Management at Charge Station

Grant Recipient must provide DC Fast-Charging and Level 2 EVSE and back-office/networking and transaction support that allows Point-of-Sale payment using a credit or debit card swipe at the Charging Station without incurring any additional fees, inconvenience or delays versus other payment or access control methods. Grant Recipient may offer additional payment mechanisms, such as RFID or Smart card that is linked to a credit card. The Point-of-Sale and supporting network must use an open protocol to allow subscribers of other EV charging system networks to access the charging station.

6.2 Cost Responsibilities

As Owners/Operators of the DC Fast Charging equipment and Level 2 EVSE co-located with the DC- Fast Charge stations, Grant Recipient shall be legally responsible for ensuring payment of all operating costs, including but not limited to payment of leases, rents, royalties, licenses, fees, taxes, revenue-sharing, utilities, and electric power supply for the Charging equipment and supporting elements, such as area lighting.

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6.3 Consumer Support

Grant Recipient must provide customer support service that is accessible 24/7 via a toll-free telephone number clearly posted near the charging equipment that is available to EV drivers accessing the charging equipment, and to host site staff.

6.4 Maintenance and Service Levels

During the Period-of-Performance, Grant Recipient must provide complete maintenance and operation services for both DC Fast Charge and Level 2 charging equipment. Grant Recipient is responsible:

- a. To maintain all components of the electric vehicle charging station which includes but is not limited to the charging station pedestals, ancillary equipment, and any awnings, canopies, shelters and information display kiosks or signage associated with the charging station. "Maintain," as used in this agreement shall mean "to provide all needed repairs or desired and approved alteration, as well as to clean the equipment and keep it safe, clean, and presentable."
- b. To ensure all charging station components are operational 24 hours per day, 365 days per year and meet all applicable federal, state, and local electrical and building codes for construction and use of this equipment in a public accessible venue.
- c. To provide phone and email contact information for consumers and appropriate personnel or offices to address any issues such as but not limited to malfunctions, repairs, or vandalism. All issues must be addressed within 24 hours of the initial notice and the resolution must be approved by designated WSDOT or Host Site personnel, depending upon the location of the EV charging station. This information must be displayed and visible on or very near the charging station pedestal and in any information kiosk.
- d. To provide on-going liability insurance that protects WSDOT in the event of any claim from charging station users from any damage to personal property or harm caused to persons resulting from the any of the electric vehicle charging station components.
- e. To coordinate any repairs, alterations, or other maintenance items for any of the electric vehicle charging station components and gain approval from the Site Host or, in the case of stations located at state-owned rest areas, from WSDOT personnel, prior to performing any work on site.
- f. To provide the electrical power service and supply needed to power DC Fast Charge and all Level 2 charging stations at least through the Period-of-Performance.

6.5 Warranty Service

Grant Recipient shall provide warranty on all DC Fast Chargers and Level 2 charging equipment for a minimum period of three years, commencing upon the date of acceptance by WSDOT. The warranty shall include repair or replacement of EVSE as necessary to correct any defects or failures. The warranty must include all materials, equipment, tools, labor and incidentals necessary to complete such repairs or replacements.

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7. Marketing and Communications

7.1 Co-Branding of Equipment and Consumer Web Portal

Grant Recipient shall work with WSDOT to incorporate its West Coast Electric Highway branding into the front-end consumer Web portal design prior to deployment and activation. Grant Recipient shall work with WSDOT on any co-branding of the EV charging equipment housing. WSDOT retains final approval over branding and use of corporate logos and graphics on the exterior housing of the EV charging equipment and associated structures, kiosks or displays during the full Period-of-Performance.

7.2 Messaging Content Approval and Retention of Display Rights

During the Period-of-Performance, WSDOT retains final approval authority over 100 % of the content of messaging at EV charging stations, whether such messaging is static display or variable messaging. WSDOT reserves 25% of all messaging capacity for project related information and announcements of its own design and purpose. For purposes of this section, "messaging content" refers to all forms of visual or audio communication, whether commercial or non-commercial in nature that is displayed or broadcast for public consumption.

7.3 Marketing and Communications Support

Grant Recipient shall support the promotions, marketing and communications related to the EV charging stations. Grant Recipient and WSDOT shall work collaboratively on media and public events, issuance of press releases and materials, and project-related announcements during the Period-of-Performance.