

FY 2009-2011

Clean Vehicle Rebate Project Final Report



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California Center for Sustainable Energy

FY 2009-2011

Clean Vehicle Rebate Project

Fiscal Year 2009-2011 Final Report

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Abstract

The mission of the California Air Resources Board (ARB) is to promote and protect the health and welfare of the residents of California by establishing air quality standards and developing programs to reduce harmful greenhouse gas emissions and air pollutants. The state has initiated several policy directives to encourage and expand the use of alternative fuel vehicles. The Clean Vehicle Rebate Project (CVRP) was created and funded through Assembly Bill 118, authored by Speaker Fabian Nunez (D-Los Angeles). Through increases in vehicle and vessel registration fees, AB 118 generates approximately \$120 million to advance the development and acceptance of alternative and renewable fuel and vehicle technology.

The CVRP is an incentive program that provides rebates for the purchase or lease of new eligible vehicles including electric, fuel cell, and plug-in hybrid electric throughout the state of California. The scope of work included the creation of a website with program information, applications, filing instructions and tracking mechanism for program funding availability.

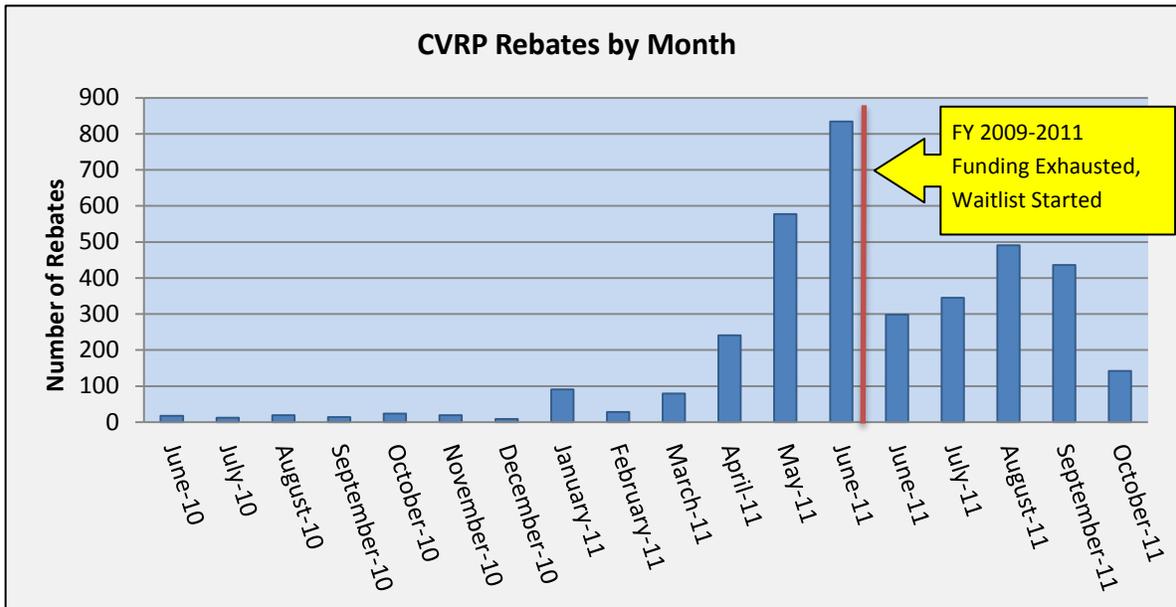
In the first two years of the program, the CVRP distributed \$10,292,750 in cash rebates to owners and lessees of 1,980 eligible electric, plug-in electric and fuel cell vehicles in California.

Executive Summary

Overview

The Clean Vehicle Rebate Project (CVRP) is an incentive program that provides rebates toward the purchase or lease of fuel cell, plug-in hybrid electric and battery electric vehicles, collectively referred to as plug-in electric vehicles (PEV) throughout the state of California. Funding for the project is provided by the California Air Resources Board (ARB) via vehicle and vessel registration and smog abatement fees. Each year ARB conducts a competitive solicitation process to select an administrator of the CVRP. Since the program began in March 2010, the California Center for Sustainable Energy (CCSE) has been chosen to manage the project. This report is the final component of the FY 2009-2010 and 2010-2011 grant agreement between ARB and CCSE.

While project funding became available in March of 2010, the number of rebate applications per month was consistently low until the launch of the Nissan LEAF in early 2011. From April to June 2011, rebate applications doubled each month resulting in approximately 82% of total FY 2009-2011 rebate funds allocated during this four month period. As a result of this tremendous growth in rebate applications, the CVRP exhausted rebate funding for FY 2009-2011 in mid June of 2011. After rebate funding was depleted, CCSE started a waiting list for applicants with the understanding that FY 2011-2012 funding would be available in late 2011.



Program Results

CVRP FY 2009-2011 funds provided the opportunity for 1,980 applicants to purchase or lease an eligible fuel cell vehicle or PEV. Overall, \$10,292,750 was distributed in rebates from March 15, 2010 to approximately June 19, 2011. The tables below display more detailed information regarding program participation, including participation by applicant type, vehicle type,

and a summary of funding per vehicle category and rebates per vehicle category.

Type of Application	Rebates	Percentage of Total
Private individual or sole proprietor	1852	94%
California licensed business	108	5%
Non-profit organization	6	0.30%
Federal government agency	1	0.05%
Local government agency	4	0.20%
State government agency	9	0.45%
Total	1980	100%

Vehicle Type	Rebates Issued	Percentage of Total	Total Dollars Allocated	Percentage of Total
Commercial zero emission vehicle	49	2%	\$980,000	10%
Light-duty zero emission vehicle	1849	93%	\$9,195,500	89%
Neighborhood electric vehicle	38	2%	\$52,650	1%
Zero emission motorcycle	44	2%	\$64,600	1%
TOTAL	1980	100%	\$10,292,750	100%

Rebate Distribution

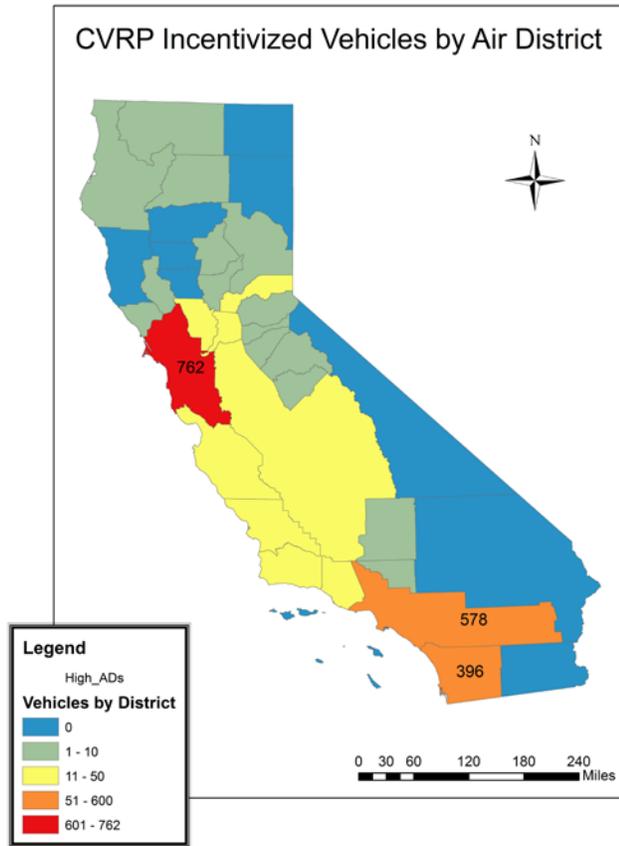
Rebates were distributed throughout the state with 27 Air Pollution Control Districts (Air Districts) being represented. The table below displays the number of rebates per Air District. The majority of rebates were focused on three major Air Districts—Bay Area Air Quality Management District, South Coast Air Quality Management District and San Diego County Air

<i>Air District</i>	<i>Number</i>	<i>Air District</i>	<i>Number</i>
AMADOR COUNTY APCD	1	NORTHERN SONOMA COUNTY APCD	1
ANTELOPE VALLEY AQMD	2	PLACER COUNTY APCD	15
BAY AREA AQMD	766	SANTA BARBARA COUNTY APCD	24
BUTTE COUNTY AQMD	2	SISKIYOU COUNTY APCD	1
CALAVERAS COUNTY APCD	2	SOUTH COAST AQMD	600
EL DORADO COUNTY AQMD	6	SAN DIEGO COUNTY APCD	398
EASTERN KERN APCD	2	SHASTA COUNTY AQMD	3
FEATHER RIVER AQMD	1	SAN JOAQUIN VALLEY APCD	26
LAKE COUNTY AQMD	1	SAN LUIS OBISPO COUNTY APCD	13
MONTEREY BAY UNIFIED APCD	34	SACRAMENTO METRO AQMD	20
MARIPOSA COUNTY APCD	1	TUOLUMNE COUNTY APCD	1
MOJAVE DESERT AQMD	1	VENTURA COUNTY APCD	35
NORTH COAST UNIFIED AQMD	4	YOLO-SOLANO AQMD	17
NORTHERN SIERRA AQMD	3	TOTAL	1980

Pollution Control District.

In addition to the previous table, the map below also provides information on the geographic distribution of CVRP rebates. There is a significant gap compared to the three leading Air Districts and the next closest region, regarding PEV adoption.

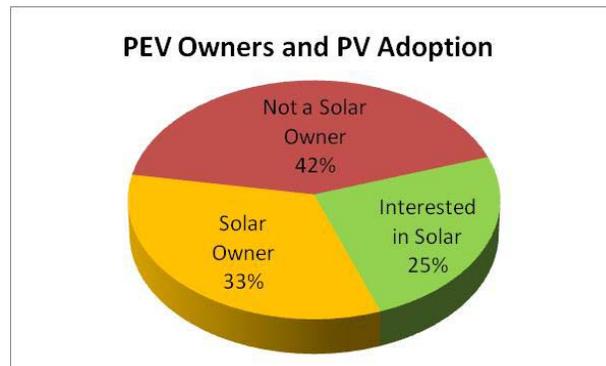
This disparity in CVRP distribution is likely due to three factors; OEM targeted marketing, the demographic of early adopters and additional incentives. Each of these areas was targeted by OEMs, specifically Nissan for their first-tier marketing efforts. In addition to possessing a high concentration of key demographic early adopters—tech professionals, well educated and higher level income—these areas also had significant incentives vis-à-vis charging infrastructure through the federally funded EV Project.



CVRP and Solar Adoption

Early in the administration of the CVRP, CCSE noticed a consistent theme among applicant questions regarding the link between PEVs and renewable energy. In an effort to quantify this link, CCSE added a brief survey to the CVRP application. When individuals apply for a rebate, they are asked if they are a solar owner and if not are they interested.

As a result of this basic survey, CCSE learned that 33% of CVRP zero emission vehicle applicants are already solar owners and, beyond that, 25% are interested in adding solar to their homes. While this survey cannot ascribe a causal link to PEV ownership and propensity for solar, it does signal a strong relationship.



CVRP Introduction

On December 1, 2009, the Air Resources Board (ARB) awarded the California Center for Sustainable Energy (CCSE) a grant to administrate the Clean Vehicle Rebate Project (CVRP), a state wide incentive program for the purchase or lease of new electric, plug-in hybrid and fuel cell vehicles. Incentives under this program included rebates up to \$1,500 for zero emission motorcycles (ZEM) and neighborhood electric vehicles (NEV), \$5,000 for zero emission vehicles (ZEV), and up to \$20,000 for commercial zero emission vehicles (CZEV). Eligible applicants include individuals, businesses, public agencies, private organizations and non-profit organizations.

For FY 2009-2010, the CVRP final grant budget was \$4.1 million with \$3,723,456 allocated to vehicle rebates and \$376,544 for administrative costs. CCSE was again chosen to administrate the CVRP for FY 2010-2011 on January 19, 2011, with a final grant budget of \$5 million. This budget includes \$307,707 for administrative costs and \$4,692,923 allocated towards vehicle rebates. In addition to ARB funding, the California Energy Commission (CEC) provided \$2 million in supplementary funding for the CVRP, which included \$123,000 toward administrative costs and \$1,877,000 in vehicle rebates, specifically for light-duty ZEVs capable of freeway operation and certified for four or more passengers.

The additional funding from the CEC was in response to the sharp increase in demand for the CVRP. While project funding became available in March of 2010, the number of rebate applications was consistently low until the launch of the Nissan LEAF in early 2011. From April 2011 to June 2011, rebate applications doubled each month resulting in approximately 82% of total FY 2009-2011 rebate funds being allocated during this four month period. As a result of this tremendous growth in rebate applications, CCSE has combined the final report for FYs 2009-2010 and 2010-2011 (see Exhibit 1 in the appendix).

This report is the final component of the Clean Vehicle Rebate Project Grant Number G09-AQIP-02 and is structured in four sections. First, the report describes the steps involved in developing the program. The second section reviews CCSE's outreach efforts. The third section covers implementation challenges and the final section contains recommendations for program improvement.

Program Development

Directly after being awarded the grant to administrate the CVRP, CCSE worked closely with ARB to develop the first components of the CVRP. In the first stage of the contract, CCSE and ARB created the CVRP Implementation Manual (IM), an online and paper application form and built out the framework for the CVRP website. A brief summary of each of these milestones is provided below.

Implementation Manual

CCSE and ARB worked closely together to produce the IM, a comprehensive document that provides clear and concise information to a diverse group of stakeholders. The IM is essential to both the development and management of the CVRP. Consumers, vehicle manufacturers and dealerships use the document as a guide to navigate through the program. Overall the IM includes information on eligible vehicle types, participant requirements, rebate structure, and administrator responsibilities.

Through the course of the project, CCSE and ARB amended the IM twice to adapt to newly presented information about vehicle delivery schedules. The first amendment updated the disbursement schedule for vehicle rebates to provide CCSE with adequate funds to quickly and efficiently process rebate requests. Second, CCSE amended the disbursement schedule for administrative funds to better reflect the rate and timing of CCSE's public outreach activities necessary for successful project implementation. Each amendment allowed CCSE to better and more efficiently manage the program.

Application and Supporting Documents

After the IM was completed, CCSE produced a series of marketing materials to provide further clarifications on both the application process and eligibility requirements. Each of these documents was designed to be used on both a print and web format. This allowed CCSE to provide consistent messaging on programmatic information to potential applicants, such as rebate process instructions, eligibility requirements and important application milestones.

In conjunction with the marketing collateral previously described, CCSE developed a web and print based application. The print version was created to ensure the program was accessible for those without internet access. Offering an online application enabled CCSE a more streamlined system to gather applicant information as well as increase the overall application throughput. Between FY 2009-2011, the overwhelming majority of applications were submitted online.

Website Development

CCSE created www.energycenter.org/cvrp, a website dedicated to the CVRP on November 6, 2009, well before the beginning of the program. The website consists of three main functional components. The first, the content management system, allows for the timely and responsive incorporation of changing data and content about the program. The second, the customer relationship management component, securely captures and stores all participant information. The final piece, the database management system, organizes the control and distribution of documents related to the project and assists CCSE staff in tracking total funds available and expended in real time.

Outreach Efforts

The heart of the marketing and outreach plan for the CVRP is composed of an engaging user-friendly website, multi-stakeholder workshops, a strong and growing network of original

equipment manufacturers (OEM)/dealer relationships and outreach targeting federal non-attainment areas. Additionally, the plan includes the development of CVRP marketing material and participation in a number of statewide automobile events.

Website

The CVRP website is the greatest tool available for educating consumers and is likely the first place that consumers visit to learn about the program as well as apply for a rebate. As a result, CCSE worked diligently to build a site that was user friendly as well as inclusive of key program information. CCSE created several different sections on this site to provide transparent and up-to-date information including: available funds page, frequently asked questions and CVRP news feeds. For more detailed information of these components, see Table 1 below.

Table 1: Description of Website Components

Website Component	Function
Main Page	Project home page containing CVRP application steps overview, links to online application, current funding levels, and project frequently asked questions
About the CVRP	Project overview and background, current funding levels, a downloadable CVRP Implementation Manual, CVRP news, application requirements, utility contact information and project administrator contact information
Eligible Vehicles	List of eligible vehicles including vehicle type, manufacturer, models, rebate amount and links to manufacturer web sites
CVRP Available Funding	Real time data display of current pending applications, waiting list totals, reserved funds, rebates issued, funds remaining and number of rebates by vehicle type
Frequently Asked Questions	Questions and answers regarding the CVRP application process, additional PEV infrastructure incentives, available rebate funding, program changes and general CVRP issues
Other Incentives	Details local rebate incentives, tax incentives and other clean vehicle incentives
CVRP Glossary	Definitions for terminology relating to the CVRP
CRVP Resources	Downloadable project forms including CVRP Implementation Manual, CVRP Applicant Requirements, Vehicle Manufacturer Application, Eligible Vehicle List
Clean Vehicle Updates	Summarized CVRP updates in the form of concise blog articles and news related to the clean vehicle technology advancement

The CVRP website continues to provide consumers with a central location for CVRP information. Additionally, the website offers consumers in California a clearing house of information about PEV technology and incentives. The popularity for PEVs along with the website improvements

has contributed to the CVRP becoming the most frequently visited page on the CCSE website. To date the CVRP page has seen 30,000 viewers.

Brochures and Flyers

To accompany the website, CCSE created numerous pieces of marketing materials including a brochure, flyers and meeting agendas. These materials covered information about the program as well as general plug-in electric vehicle (PEV) information. The brochure was designed to provide an overview of the program, highlighting information about program funding, vehicle and applicant eligibility requirements as well as the application process. Overall, the goal of the brochure was to direct consumers to the website and, specifically, the rebate application.

CCSE created a general agenda to provide greater information and promote workshops to prospective participants. Agendas were modified to represent the various partners represented at each workshop. Further, CCSE created flyers covering a wide range of topics from basic information about the CVRP to the benefits of purchasing a PEV. Each of these flyers complemented the brochure at workshops and events CCSE staff attended. Examples of the brochure, agenda and flyers can be found in the appendix (Exhibits 1-4).

Events and Workshops

CCSE has completed an extensive public outreach plan as part of the administration of the CVRP. To accomplish the plan, CCSE used a combination of workshops and presentations at events such as conferences and auto shows to promote the CVRP and build consumer awareness regarding PEVs.

CVRP & PEV Workshop

Over the past year, CCSE developed a successful model for CVRP workshops that served as a “one stop shop” for PEV consumers. By bringing together multiple PEV market stakeholders, CCSE was able to provide information to consumers on each aspect of purchasing and owning a PEV. Each stakeholder and their contributions are listed in Table 2.

Table 2: Workshop Stakeholders

Stakeholder	Key Message to Consumers:
CCSE	Provide framework for the presentation, description of CVRP and the need and benefit of PEVs.
Utilities	PEV utility rates and EV impact to the grid.
Air Quality Management Agencies	Provide information of the local air quality issues for each region. Description of additional local incentives if available.
Electric Vehicle Supply Equipment (EVSE) Providers	Describe the technology available and walk consumer through the installation process.
Municipalities	Provide consumers with in-depth information on the permitting and inspection process necessary for EVSE installation
OEMs or Local Dealers	Enable consumers to view and potential test drive CVRP eligible vehicles.

Throughout the course of the FY 2009-2011 CVRP, CCSE held workshops across the state. In an effort to match PEV deployment with incentives offered via the CVRP, workshop locations followed key markets targeted by vehicle manufacturers. In addition to targeting these areas, CCSE also collaborated with stakeholders in the South Coast and San Joaquin Valley Air Districts. Both of these areas have been identified as federal non-attainment areas regarding ground level ozone, and thus were given additional attention to promote the use of PEVs and maximize the benefit to air quality. Table 3 lists the location of these workshops as well as the number of participants.

Table 3: Workshop Location

Region	Workshop Location	Attendance
Northern	Sacramento	40
Bay Area	San Francisco	100
Central Coast	Santa Barbara	75
Central Valley	Fresno	25
Southern	San Diego, Los Angeles, Diamond Bar	150
Total Number of Workshop Participants		390

Auto Shows

CCSE attended many of the auto shows in the state providing interested consumers with information about the CVRP. At each show CCSE managed a table with marketing brochures and flyers as well as provided consumer feedback regarding PEV incentives, EVSE installation and other general PEV questions. Table 4 includes a list of these auto shows, dates in attendance and the estimated number of consumer interactions.

Table 4: Auto Shows

Auto Show	Dates	Consumer Interaction
Alt Car Expo (Santa Monica)	Oct. 1-2, 2010	2,000
Orange County Auto Show (Anaheim)	Oct. 8-9, 2010	2,000
San Francisco International Auto Show	Nov. 19-22, 2010	1,000
Los Angeles International Auto Show	Nov. 19-20, 2010	2,500
San Diego International Auto Show	Dec. 30-Jan. 2, 2011	500
Santa Barbara Green Auto Show	Apr. 16-17, 2011	3,000
Estimated Total Number of Consumer Interactions		11,000

Dealer Outreach and Education

Due to the ability to reach a large number of consumers during the same event, PEV dealer relationships and education are extremely important to CCSE’s marketing and outreach efforts. Dealership education and relationship building with the OEMs are also critical to maximizing the use of the CVRP budget. CCSE has forged multiple successful relationships with OEMs and dealers throughout the state. These relationships have allowed CCSE to deliver CVRP messaging at a variety of events in California, including Nissan’s Electric Drive Tour which enabled CCSE to reach approximately 10,000 consumers with minimal administrative costs. Additionally, during the administration of the FY 2009-2011 CVRP, CCSE partnered with Toyota, Mitsubishi, Tesla, Vectrix and General Motors to showcase each of their PEVs.

Over the past two years, CCSE has leveraged OEM relationships to partner with a number of dealerships and introduced a series of dealer webinars. Dealer webinars provided funding level updates, rebate process and procedure clarification and general project information. These webinars have proven to be valuable in delivering a clear and consistent message to dealers who are communicating directly with the consumer. As a result of this communication, CCSE is regularly contacted by dealerships across the state for program information as well as general questions regarding PEVs.

Social Media

In an effort to maximize the CVRP administration budget, CCSE utilized low-cost methods to reach PEV consumers. For example, CCSE has been an active contributor to mynissanleaf.com, an online forum organized by consumers interested in the Nissan LEAF. The forum has enabled the organization to effectively communicate important project messages, like rebate availability, development of the waiting list and future funding directly to consumers via a dedicated thread titled “Tracking the \$5k California CVRP Fund”¹. To date the thread has 578 replies with over

¹ Note: this thread has been renamed as a result of the reduction in the maximum rebate amount. It is now titled “Tracking the \$2.5K California CVRP Fund”.

21,000 views. CCSE will continue to be an active member of this and future forums as they develop.

Program Results

The following section provides a brief summary of CVRP results. A detailed summary of program results can be found in the appendix (Exhibits 5-9).

Rebate Summary

CVRP FY 2009-2011 funds provided the opportunity for 1,980 applicants to take advantage of the incentive. Overall, \$10,292,750 was distributed in rebates from March 15, 2010 to approximately June 19, 2011. Of the total number of applications, private individuals received the overwhelming majority at 92% of total rebates. Rebates for California businesses, governments and non-profit organizations were significantly lower at 6%, less than 1% and less than 1% of the rebate applications, respectively.

The most popular vehicle category over the past two years of the CVRP was ZEVs. Overall, ZEVs were responsible for 93% of the rebates issued and 89% of program funds allocated. Within this vehicle category, 94% of vehicles rebates went to the Nissan LEAF at approximately \$8.6 million. CZEVs were the next largest vehicle category at 10% of total program funds and 2% of total rebates issued. After a significant gap, ZEMs and NEVs followed with less than 1% of total program funds issued and approximately 2% of total rebates issued, respectively. Detailed information on rebates by vehicle type and model can be found in the appendix (Exhibit 8).

Rebate Distribution

Rebates were distributed throughout the state with 27 Air Pollution Control Districts (Air Districts) being represented. A majority of the rebates were focused on three major Air Districts: Bay Area Air Quality Management District, South Coast Air Quality Management District and San Diego County Air Pollution Control District. This distribution is highly likely due to OEM marketing efforts, the presence of additional incentives and a high percentage of early adopter demographics.

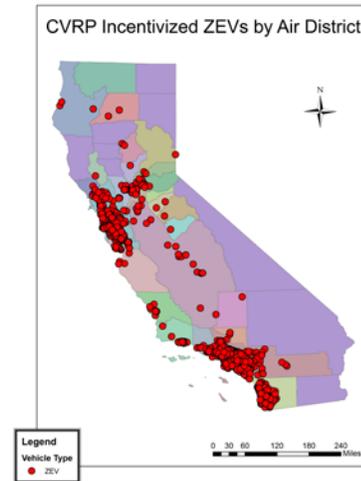
Each of these areas was targeted by OEMs, specifically Nissan for their first tier marketing efforts. In addition to possessing a high concentration of key demographic early adopters—tech professionals, well educated and higher level income—these areas also had significant incentives vis-à-vis charging infrastructure through the federally funded EV Project. A complete list of rebates by Air Districts can be found in the appendix (Exhibits 5-6).

Light-Duty Zero Emission Vehicles

Out of the 1,980 vehicles rebated under the CVRP for FY 2009-2011, 1,849 of these were light-duty ZEVs. While ZEVs took up the bulk of rebates, within this vehicle category the Nissan LEAF was the leader with 87% of the total vehicles rebated. Next to the Nissan LEAF, the Tesla Roadster was the second most popular ZEV with 107 rebated vehicles, with the third and fourth going to the Honda FCX-Clarity and the Smart USA ED Cabriolet and Coupe at 8 and 4 rebates,

respectively. The disparity of rebates between vehicle models in the ZEV category is likely due to cost and availability. Even with a rebate of \$5,000 the over \$100K price tag on the Tesla roadster is a considerable barrier for many consumers. In addition to the cost, the Tesla Roadster, Honda FCX-Clarity and Smart USA ED Cabriolet and Coupe were produced in a limited quantity compared to the LEAF.

Geographically we have seen clustering of these vehicles into three areas—Bay Area, greater Los Angeles metropolitan area and San Diego County. While these three areas continue to be market leaders with respect to ZEVs, there are growing pockets in the greater Sacramento area and the Central Valley.



Commercial Zero Emission Vehicles

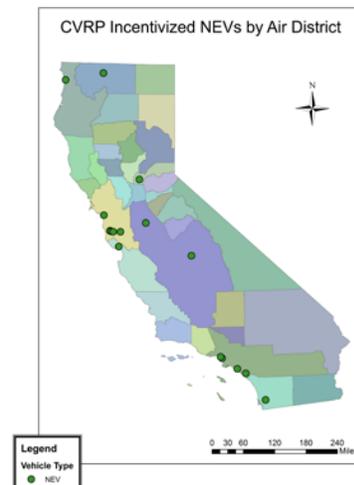
CZEVs were eligible for a rebate of \$20,000 from the CVRP throughout the duration of FY 2009-2010. However, by mid February of 2011, this category of vehicles transitioned to the Hybrid Voucher Incentive Program (HVIP), which is currently administered by CALSTART (<http://www.californiahvip.org/>). In contrast to the direct to consumer rebates offered via the CVRP, the HVIP program provides vouchers to vehicle dealers or distributors, which is ideal for fleet purchasers who are the majority of CZEV consumers.

In all 49 CZEVs were rebated between three California businesses. Two of these businesses were located within the jurisdiction of the Bay Area Air Quality Management District with the remaining one in the South Coast Air Quality Management District. While four models were eligible for the rebate, only two models were rebated under the CVRP. The bulk of CVRP CZEZ rebates at 80% went to the Smith 2009/2010 Newton 1-9. The resulting 20% went to the Navistar 2010 eStar 300 series. This disparity in rebate distribution in vehicle manufacturer is likely due to additional incentives offered from Smith as part of separate Department of Energy funding.

Neighborhood Electric Vehicles

Overall, NEVs represented 2% of vehicles rebated under the CVRP, the equivalent of 38 vehicles. Within this category, the distribution of funding was split between two manufacturers. Approximately 55% of CVRP NEV consumers chose a Miles NEV with 45% choosing one of the five GEM models eligible for the program.

The majority of the NEVs rebated under the program were distributed within the Bay Area and the greater Los Angeles

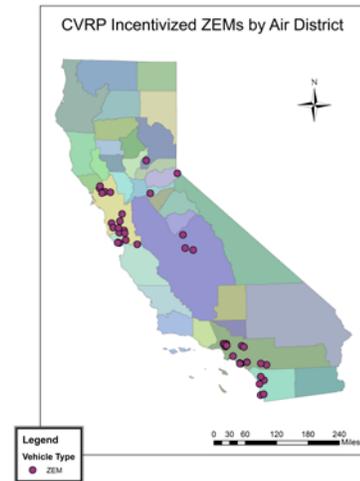


metropolitan area. However there was also minimal representation in the Central Valley and Northern California.

Zero Emission Motorcycles

Similar to NEVs, ZEMs represented roughly 2% of vehicles rebated under the CVRP or 44 vehicles. Within this category 77% of funding went to Zero DS 2009-2011. The remaining funding was split between the Brammo 2010 Enertia with 15% and the Vetrax MaxiScooter VX-1 2007-2011 with 6%.

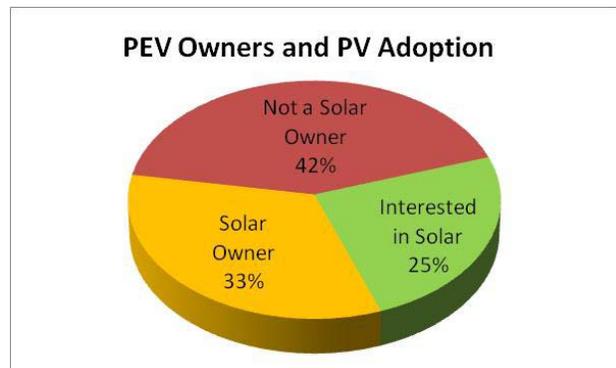
Again, the majority of the vehicles rebated were distributed within the Bay Area, the greater Los Angeles metropolitan area and San Diego County. There were also pockets in the greater Sacramento area as well as the Central Valley.



CVRP and Solar PV Adoption

Early in the administration of the CVRP, CCSE noticed a consistent theme among applicant questions regarding the link between PEVs and renewable energy. In an effort to quantify this link, CCSE added a brief survey to the CVRP application. When individuals apply for a rebate, they are asked if they are a solar photovoltaic (PV) owner and, if not, are they interested. As a result of this basic survey, CCSE learned that 33% of CVRP zero emission vehicle applicants are already solar owners and, beyond that, 25% are interested in adding solar to their homes.

While this survey cannot ascribe a causal link to PEV ownership and propensity for solar, it does signal a strong relationship. These results have also helped CCSE cater specific information to CVRP participants' highlighting the PEV/solar PV link as well as the benefits of energy efficiency retrofits to PEV ownership through a series of pilot workshops. The main objective of these workshops is to educate consumers on the benefit of renewable energy and energy efficiency as well as direct them to existing incentive programs in these areas (e.g. California Solar Initiative and Energy Upgrade California). Further, CCSE plans on incorporating a more refined renewable/energy efficiency question into the planned CVRP charging behavior survey due out in FY 2011-2012.



Implementation Challenges and Program Improvements

The CVRP is a dynamic program that is continuously refined as it matures. This section highlights three main implementation challenges related to the rebate process, resale of a rebated vehicle and communication to consumers. In each of the examples listed below, CCSE

made every effort to remedy these challenges. When possible, CCSE staff created standard operating procedures (SOPs) to ensure that lasting systems were in place helping to mitigate future impacts. It is also important to note that on several occasions, the close working relationship with ARB liaison Meri Miles was instrumental to finding solutions to these challenges.

Rebate Process

Processing rebates accurately, efficiently and quickly is central to the success of the program. The complete Rebate Process SOP can be found in the appendix (Exhibit 10). Through keen foresight and detailed planning, CCSE was able to adapt the rebate process to absorb the exponential growth in rebate applications. While CCSE processed approximately 82% of project funding in a period of four months, rebate applicants received incentives well before the 60-day period specified in the CVRP contract. However, this sharp increase in rebate demand was definitely a challenge to implementing the program.

In an effort to reduce the administrative burden to the CCSE accounting department, program staff specified a specific day to process CVRP rebate incentives. This schedule enabled program staff to send the accounting department a consistent a stream of rebate claims per week. In addition, this modification allowed for more reliable data on the turnaround time for rebate checks, which proved to be valuable piece of information for consumers.

Vehicle Resale

Soon after the release of the Nissan LEAF CCSE learned that a rebate applicant had violated the conditions of the CVRP by re-selling their rebated vehicle without contacting CCSE or ARB. CCSE immediately created a case file regarding this applicant and informed ARB of the information. This case highlighted the need for an enforcement mechanism to mitigate similar actions in the future. CCSE relied heavily on ARB to create this mechanism.

Through their strong relationship with the Department of Motor Vehicles, ARB was able to administer quarterly checks of CVRP applicant information and their associated vehicle registration. These checks enabled ARB to identify any inconsistencies, such as change in vehicle registrations from CVRP applicant data provided by CCSE. Pending an inconsistency with rebate applicant information, ARB has tasked CCSE with following up with the applicant. Furthermore, ARB will take any necessary measures to retrieve rebate funds. While this process is necessary to mitigate consumer abuse of the project, CCSE and ARB understand that resale of a vehicle or return to a dealer will be necessary for a small number of consumers.

Taking this into consideration, CCSE and ARB worked together to create a SOP for the resale of a rebated vehicle. The complete Vehicle Resale SOP can be found in the appendix (Exhibit 11). Through a collaborative effort, CCSE and ARB staff were able to identify a simple and straightforward process. This SOP, as well as future CVRP SOPs, will be provided as attachments to the CVRP IM and available on the CVRP website in order to provide greater program transparency.

Consistent Program Communication

Providing clear and consistent messaging to CVRP consumers has been a challenge over the life of the project. As the program has grown, CCSE has utilized several methods to ensure that this objective is being met. One strategy has been to leverage existing social media sites like mynissanleaf.com. Rather than inundating consumers with a deluge of emails, posting on this site has allowed CCSE staff a direct channel to a wide group of PEV adopters as well as CVRP applicants. The site has also provided CCSE staff with greater understanding of the main issues concerning PEV owners.

In addition to taking advantage of social media, CCSE has utilized the dynamic features of the CVRP website to provide real time information on project funding to consumers via the Available Funding page. This microsite has been extremely useful to consumers throughout the project but especially leading up to program funds being exhausted and informing consumers of the waitlist procedures.

In addition to these measures, CCSE worked closely with ARB staff to outline a messaging strategy regarding program funds being depleted. CCSE launched a pop-up window informing applicants of decreasing rebate funds and specific language regarding the waiting list provision at each step of the online application process. Additionally, CCSE created a program update page providing users a snapshot of relevant changes and modifications to the program as well as any future updates that may occur. For users that want more detailed information, each of the changes/updates was also linked to a more comprehensive description on the CVRP Blog. Each of these measures helped to provide clear and consistent information to consumers.

Recommendations for Program Improvement

CCSE successfully administered the CVRP for FY 2009-2011 through education, outreach, and distribution of rebates in a timely and efficient manner. Upon reflection of the past two years administrating the CVRP, CCSE has several recommendations for program improvement.

Removal of Wet Signature Provision

CCSE recommends removing the requirement of a wet signature for the CVRP application. This requirement significantly increases the overall processing time by requiring applicants to mail in their application. Removing this provision and accepting a digital signature would reduce the overall processing time and improve program efficiency.

CCSE understands the need to ensure adequate integrity, security and confidentiality of applicant information when using an electronic signature on the CVRP application. Thus CCSE recommends working with ARB to adopt control processes and procedures to certify the security of these signatures. Additionally, CCSE will leverage the lessons learned on both the state and federal level regarding the use of electronic signatures. For example, in Utah signors of a petition have to enter a security code that corresponded to the last four digits of their driver

license number before their signature would be counted. Examples like these will help both ARB and CCSE ensure the security of CVRP applicant information.

Website

CCSE recommends strengthening the CVRP webpage by adding the following new components:

Revamp Additional Incentives: CCSE will leverage the work that ARB continues to manage with the drivecleanca.gov website; this will ensure that consumers in California have the most up-to-date information regarding incentives in their respective areas.

PEV Nexus Page: Informing consumers with additional air quality improvements as well as GHG reduction technologies. This page will also include links to complimentary incentive programs and targeted case studies that show the benefit of combining PV, energy efficiency and PEVs.

PEV Regional Readiness Page: Linking consumers with the work that each region is doing vis-à-vis PEV regional planning². CCSE will provide brief updates and/or links to permitting and inspection processes, upcoming work shops or events, as well as mapping of planned and available EVSE public infrastructure.

Outreach

CCSE recommends coordinating workshop efforts with marketing and outreach associated with regional EV planning throughout the state. CCSE will also expand outreach efforts in federal non-attainment areas. It is also recommended to again partner with Nissan and for the first time with Mitsubishi on their marketing efforts. Additionally, it is suggested that CCSE expand to work with Ford, providing consumers with CVRP information at each of their “ride & drive” events throughout the state. Participating in OEM-hosted events allows for maximum CVRP message exposure with minimum impact to the CVRP administrative budget. CCSE also recommends continuing statewide workshops and including municipalities and OEMs or local dealers during the FY 2011-12 administration of the CVRP.

Dealer Webinars

Over the past two years, CCSE has leveraged OEM relationships to partner with a number of dealerships and introduced a series of dealer webinars. Dealer webinars provide funding level updates, rebate process and procedures clarification and general project information. CCSE recommends institutionalizing the webinars and ensuring every effort is made to include interested EV dealers throughout the state. These webinars will be held quarterly and CCSE recommends coordinating additional webinars with release dates of new PEVs.

² The Department of Energy (<http://energy.gov/articles/awards-advanced-vehicle-development>) and the California Energy Commission (www.energy.ca.gov/contracts/PON-10-602/PON-10-602_NOPA.pdf) have awarded several grants throughout the state focused on planning for PEV infrastructure. Each of these grants is also focused on PEV consumer education.

Focus on Federal Non-attainment Areas

CCSE will focus a significant amount of marketing and education resources to the South Coast and San Joaquin Valley Air Districts which include designated federal non-attainment areas for ground level ozone.

CCSE recommends collaborating with key stakeholders including the South Coast and San Joaquin Air Districts, Pacific Gas & Electric, Southern California Edison and several local governments as part of upcoming CEC and Federal Department of Energy PEV planning and market expansion plans. CCSE will leverage our strong relationship with local partners, as well as the advisory role in the San Joaquin Valley CEC grant, to coordinate CVRP marketing with PEV planning outreach. Partnering with these organizations on their education efforts is both cost effective and mutually beneficial. CCSE will also incorporate additional local incentives into CVRP workshops and messaging. Repackaging the CVRP with local incentives will help to attract additional OEM investment and marketing efforts in regions with underrepresented PEV ownership.

Cross Program Collaboration

As administrators of the California Solar Initiative (CSI) and Energy Upgrade California (EUC) for the San Diego region, CCSE has the unique ability to effectively coordinate outreach efforts from these programs as well as the CVRP to help the state meet complimentary goals of greenhouse gas reduction and air quality improvements.

CCSE recommends collaborating with CSI and EUC program administrators to coordinate incentive messaging and educate consumers about the benefits and nexus of solar PV, energy efficiency and PEVs. CCSE will implement a pilot project that will include workshops and combined marketing materials to deliver this message in the San Diego region. Following, CCSE will provide ARB with a detailed report of effectiveness of the pilot project (see Monitoring and Evaluation section below). The findings we receive from participant evaluations will help ARB and sister agencies in possibly expanding these efforts statewide.

Monitoring and Evaluation

The CVRP presents a unique opportunity in that it has access to consumer data from the largest deployment of PEV and fuel cell vehicles in recent history. Information from these applicants on charging behavior, vehicle performance and program evaluation will help ARB and the state shape future policies promoting the market expansion of PEVs.

CCSE recommends the CVRP take advantage of this valuable data set by facilitating the development of applicant surveys. This will build on current progress made through collaboration with University of California, Davis in developing a charging behavior survey. CCSE will also develop and implement a program evaluation survey to measure the effectiveness of the program.

To better evaluate the effectiveness of CVRP workshops, CCSE recommends developing and implementing a workshop evaluation system. CCSE will continue to minimize impacts to the administration budget by building off of the proven model refined over the last six years

administering the CSI program. Special attention will be paid assessing the efficacy of cross promotional marketing between CSI, EUC and the CVRP.

Appendix

Exhibit 1: Number of Rebates by Month

Exhibit 1 displays the number of rebate applications processed from the beginning of the project up to October 14, 2011. As the graph shows, the trend in rebate applications steadily increased beginning in February of 2011, nearly doubling each month until FY 2009-2011 rebate funds were exhausted in the middle of June 2011. Once rebate funds were exhausted, CCSE began a waitlist in the anticipation of FY 2011-2012 funding, which is depicted by the data to the right of the red bar. There has been an average of 400 rebate applications per month since the waitlist began.

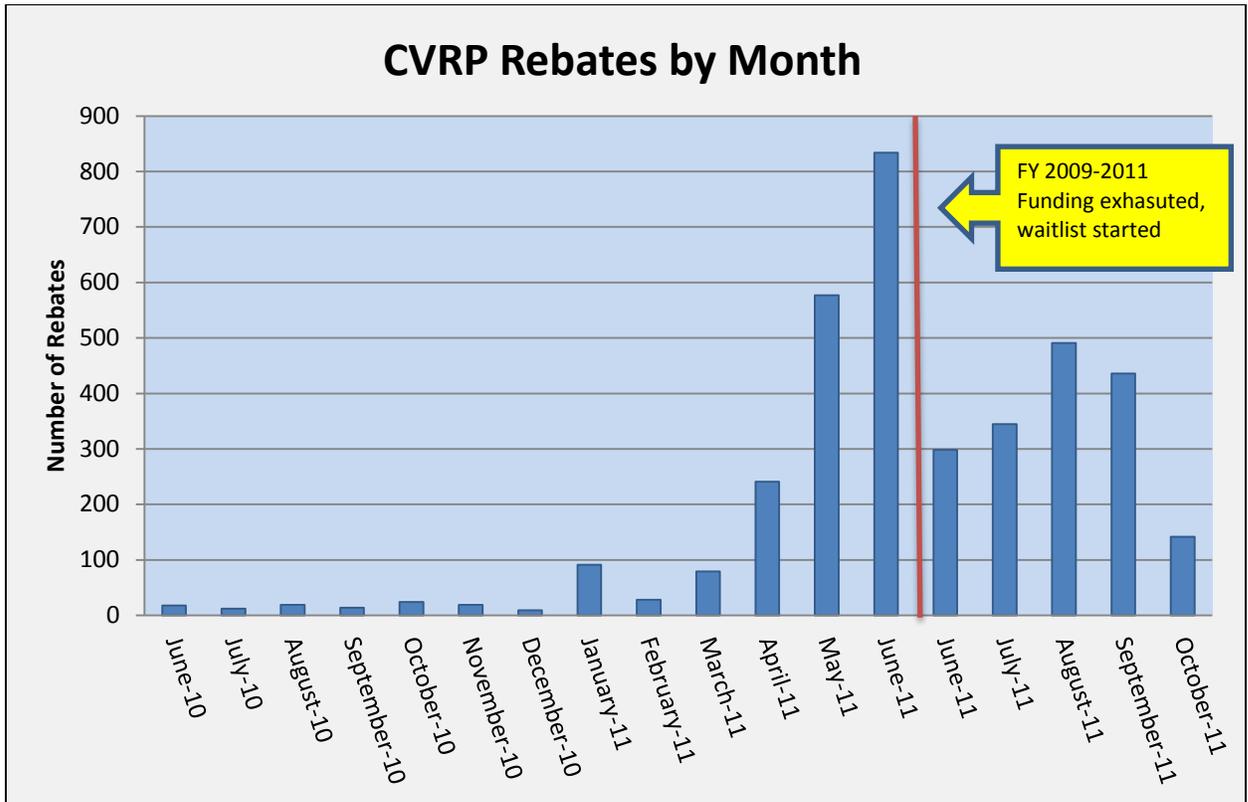


Exhibit 2: CVRP Brochure

Exhibit 2 displays the external view of the CVRP brochure for FY 2009-2011.

Reasons to Buy a Clean Vehicle:

- **Less Air Pollution** – Zero tailpipe emissions mean cleaner air to breathe.
- **Reduced Gasoline Use** – Electricity replaces foreign oil, lowering the effects of spikes in oil prices and providing energy security.
- **Save Money** – Cut your vehicle fuel bills by 50% or more.
- **Less Service** – Fewer mechanical parts means less service and no more oil changes.
- **Meeting Higher Standards** – Eligible vehicles exceed the nation's strictest fuel-economy and air standards, including smog-forming particles and greenhouse gas emissions.
- **Driving Range** – More than 70 percent of Americans drive less than 40 miles per day, which is well within the range of most commercial electric cars.

Best of all, it's affordable. The Clean Vehicle Rebate Project provides cash incentives for a wide variety of zero-emission cars and motorcycles.





About CCSE

The California Center for Sustainable Energy is a nonprofit organization that helps people adopt greener practices and save energy and money through rebates, technical assistance and education. The center fosters public policy and programs that facilitate renewable, sustainable and efficient energy technologies and practices. An independent, unbiased voice, CCSE is a trusted resource on energy issues throughout the community and California.

CLEAN VEHICLE REBATE PROJECT

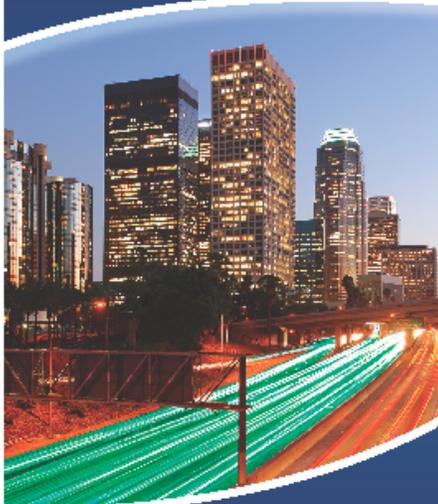
California Environmental Protection Agency | AIR RESOURCES DIVISION



California Center for Sustainable Energy
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(866) 5DENERGY
www.energycenter.org
Hours: 8 a.m. - 5 p.m., Monday-Friday




Clean Vehicle Rebate Project
Providing incentives to promote alternative transportation in California




California Environmental Protection Agency | AIR RESOURCES DIVISION

CLEAN VEHICLE REBATE PROJECT

www.cvrp.energycenter.org
www.DriveClean.ca.gov

Exhibit 3: CVRP Brochure

Exhibit 3 displays the internal view of the CVRP brochure for FY 2009-2011.

WWW.ENERGYCENTER.ORG

Clean Vehicle Rebate Project

Accelerating the adoption of zero-emission vehicles, creating cleaner air for all Californians

Transportation is in a period of transition away from gas-guzzling vehicles to cleaner ones that run on alternative fuels with no polluting emissions. To help encourage and accelerate development of vehicles powered by electricity and fuel cells, California created the Clean Vehicle Rebate Project (CVRP), a program funded by the state's Air Resources Board and managed by the California Center for Sustainable Energy.

The need for cleaner transportation is clear. Californians drive 825 million miles daily, producing 5.4 million tons of smog-forming pollutants and more than 350,000 tons of greenhouse gas emissions. This creates a serious health hazard and is a major contributor to climate change. Zero-emission vehicles present a solution, while costing you less to drive, reducing your carbon footprint and contributing to cleaner air. Now, that's something we can all enjoy.

QUALIFYING IS EASY
Qualifying for a clean vehicle rebate is straightforward. Any individual, business, nonprofit or government entity based in California who buys an eligible vehicle and operates it in the state for a minimum of 36 months qualifies. The vehicle may be electric, plug-in hybrid electric or fuel cell.

Four types of zero-emission vehicles (ZEVs) earn rebates:

- **Plug-in Hybrid Electric Vehicles** - Vehicles that operate on both gas and electricity
- **Zero-Emission Vehicles** - Any car certified to zero-emission standards, including battery electric and fuel cell
- **Neighborhood Electric Vehicles** - Low-speed vehicles with four wheels and a weight of 3,000 pounds or less
- **Zero-Emission Motorcycles** - Two- or three-wheeled electric vehicles meeting the California Vehicle Code definition of a motorcycle

GO ELECTRIC AND SAVE
Rebate amounts vary depending on the vehicle purchased. Generally, ZEV passenger cars earn \$5,000 and neighborhood ZEVs and ZEV motorcycles from \$1,000 to \$1,500.

You can check the CVRP website for a complete listing of eligible vehicles, rebate amounts and the status of available rebate funds. Once you purchase your vehicle, you simply fill out the online application. You will receive an e-mail stating the required supporting documents that need to be mailed in, along with your signed application.

Funding is provided on a first-come, first-served basis and is limited to the dollar amount allocated by the Air Resources Board each year. CVRP funding is expected to continue through 2015.

Just imagine: Each mile you drive minimizes harm to the planet and contributes to a greater good - cleaner air for us all!

ADDITIONAL SAVINGS
Federal tax incentives for full-function electric-drive vehicles range from \$2,500 to \$7,500. There is also a federal tax credit for up to 30 percent of the cost of residential and commercial electric vehicle charging equipment and installations. For vehicle tax incentives visit the Department of Energy website at www.fueleconomy.gov and for charging equipment go to www.afdc.energy.gov/afdc.

YOUR CHARGING OPTIONS
ZEVs employ a variety of technologies to achieve their energy requirements. Typical plug-in electric vehicles charge on both standard 120-volt house current and higher 240-volt outlets that fully charge batteries two to three times faster. Home recharging times vary greatly between types of vehicles and manufacturers. While home charging in the evening will meet most drivers' needs, public charging stations will become more widely available in the near future.

An ideal situation is to add renewable energy to your home or business to charge electric vehicles. You can collect free power from the sun with a solar photovoltaic system, draw electrochemical power from a fuel cell, use wind power or any other renewable source.

GET STARTED TODAY
For a list of currently eligible vehicles, rebate amounts available and details about the program and applying, visit the CVRP website:
www.cvrp.energycenter.org



Exhibit 4: CVRP Workshop Flyer

Exhibit 4 is an example from a CVRP workshop held in San Francisco, in November of 2010. This template was used in each of the workshops held across the state throughout the duration of FY 2009-2011.



Clean Vehicle Rebate Project



The California Center for Sustainable Energy administers California's Clean Vehicle Rebate Project funded by the California Air Resources Board. The goal of the CVRP is to promote the production and use of zero-emission vehicles, including electric, plug-in hybrid electric and fuel cell vehicles. Learn more about vehicle rebates by visiting: www.cvrp.energycenter.org

Join CCSE, the Bay Area Air Quality Management District, Business Council on Climate Change and the San Francisco Clean Cities Coalition for a free workshop on

Electric Vehicles: Innovation, Incentives and Infrastructure

Tuesday, November 23
2 p.m. to 4 p.m.

The San Francisco Port Ferry Building
1 Ferry Bldg. Port Commission Hearing Room
San Francisco 94111

This workshop is a one-stop shop for information on the new line of electric vehicles hitting the market. Learn about:

- the Clean Vehicle Rebate Project (CVRP) funding process, important dates and frequently asked questions
- information about local utility programs and air district programs
- the rapid build out of California's new electric vehicle charging infrastructure

Register today at
www.energycenter.org/cvrp-events















For Further Information
Clean Vehicle Rebate Project | California Center for Sustainable Energy
www.energycenter.org | (858) 244-1177

8690 Balboa Ave., Suite 100
San Diego, CA 92123
(866) SDENERGY
www.energycenter.org

Exhibit 5: CVRP Workshop Agenda

Exhibit 5 is an example from a CVRP workshop held in San Francisco, in November of 2010. Similar to the flyer in Exhibit 4, this template was replicated across the state.



Clean Vehicle Rebate Project

Rebates for Zero Emission Vehicles Agenda

Tuesday, November 23 | 2:00 p.m. to 4:00 p.m.

2:00 p.m. - 2:10 p.m.	Opening Remarks Introduce the topic, speakers and describe the format of the workshop.	David Almeida, CCSE
2:10 p.m. - 2:20 p.m.	Clean Vehicle Rebate Project Provide overview of the CVRP highlighting the application process, project funding and frequently asked questions.	David Almeida, CCSE
2:20 p.m. - 2:40 p.m.	Bay Area EV Incentives Introduce the Bay Area Air Quality Management District's proposed electric vehicle infrastructure incentive program, which includes \$5 million in funding for residential and public charging stations.	Karen Schkolnick, Bay Area AQMD
2:40 p.m. - 3:00 p.m.	EV Impact to Grid and Utility Bills Describe PG&E's electric vehicle program, including necessary infrastructure upgrades, potential EV rates for customers and other services offered.	Jim Larson, PG&E
3:00 p.m. - 3:20 p.m.	EV Charging Infrastructure Discuss the approach behind Better Place's battery switching and charging stations. Additionally, provide more information about the EV taxi demonstration project in the Bay Area.	Vandana Bali, Better Place
3:20 p.m. - 3:40 p.m.	EV Charging Infrastructure Discuss the technology behind GE's WattStation and offer more detail on consumer interaction with private and public charging stations.	David Wang, General Electric
3:40 p.m. - 4:00 p.m.	Panel Questions and Answers Participants will have an opportunity to ask individual questions to the presenters in a panel format.	All, Moderated by David Almeida





For Further Information
Clean Vehicle Rebate Project | California Center for Sustainable Energy
www.energycenter.org | (858) 244-1177

8690 Balboa Ave., Suite 100
San Diego, CA 92123
(866) SDENERGY
www.energycenter.org

Exhibit 6: CVRP Rebate Summary FY 2009-2011

The tables in Exhibit 6 display a summary of rebate information for the FY 2009-2010 and FY 2010-2011. The data in the tables below also include rebates for the additional funding provided by the California Energy Commission. For information specific to funding from the California Energy Commission see Exhibit 9.

Rebates by Applicant Type

Type of Application	Rebates
Private individual or sole proprietor	1852
California Licensed Business	108
Non-profit organization	6
Federal government agency	1
Local government agency	4
State government agency	9
Total	1980

Rebates by Vehicle Classification

Vehicle Type	Rebates Issued	Total Dollars Allocated	Percentage of Total Dollars Distributed
Commercial Zero Emissions	49	\$980,000	10%
Light-Duty Zero Emissions	1849	\$9,195,500	89%
Neighborhood Electric	38	\$52,650	<1%
Zero Emissions Motorcycle	44	\$64,600	<1%
TOTAL	1980	\$10,292,750	100%

Rebates by Air District

<i>Air District</i>	<i>Number</i>	<i>Air District</i>	<i>Number</i>
AMADOR COUNTY APCD	1	NORTHERN SONOMA COUNTY APCD	1
ANTELOPE VALLEY AQMD	2	PLACER COUNTY APCD	15
BAY AREA AQMD	766	SANTA BARBARA COUNTY APCD	24
BUTTE COUNTY AQMD	2	SISKIYOU COUNTY APCD	1
CALAVERAS COUNTY APCD	2	SOUTH COAST AQMD	600
EL DORADO COUNTY AQMD	6	SAN DIEGO COUNTY APCD	398
EASTERN KERN APCD	2	SHASTA COUNTY AQMD	3
FEATHER RIVER AQMD	1	SAN JOAQUIN VALLEY APCD	26
LAKE COUNTY AQMD	1	SAN LUIS OBISPO COUNTY APCD	13
MONTEREY BAY UNIFIED APCD	34	SACRAMENTO METRO AQMD	20
MARIPOSA COUNTY APCD	1	TUOLUMNE COUNTY APCD	1
MOJAVE DESERT AQMD	1	VENTURA COUNTY APCD	35
NORTH COAST UNIFIED AQMD	4	YOLO-SOLANO AQMD	17
NORTHERN SIERRA AQMD	3	TOTAL	1980

Exhibit 7: FY 2009-2011 CVRP Incentivized Vehicles by Air District

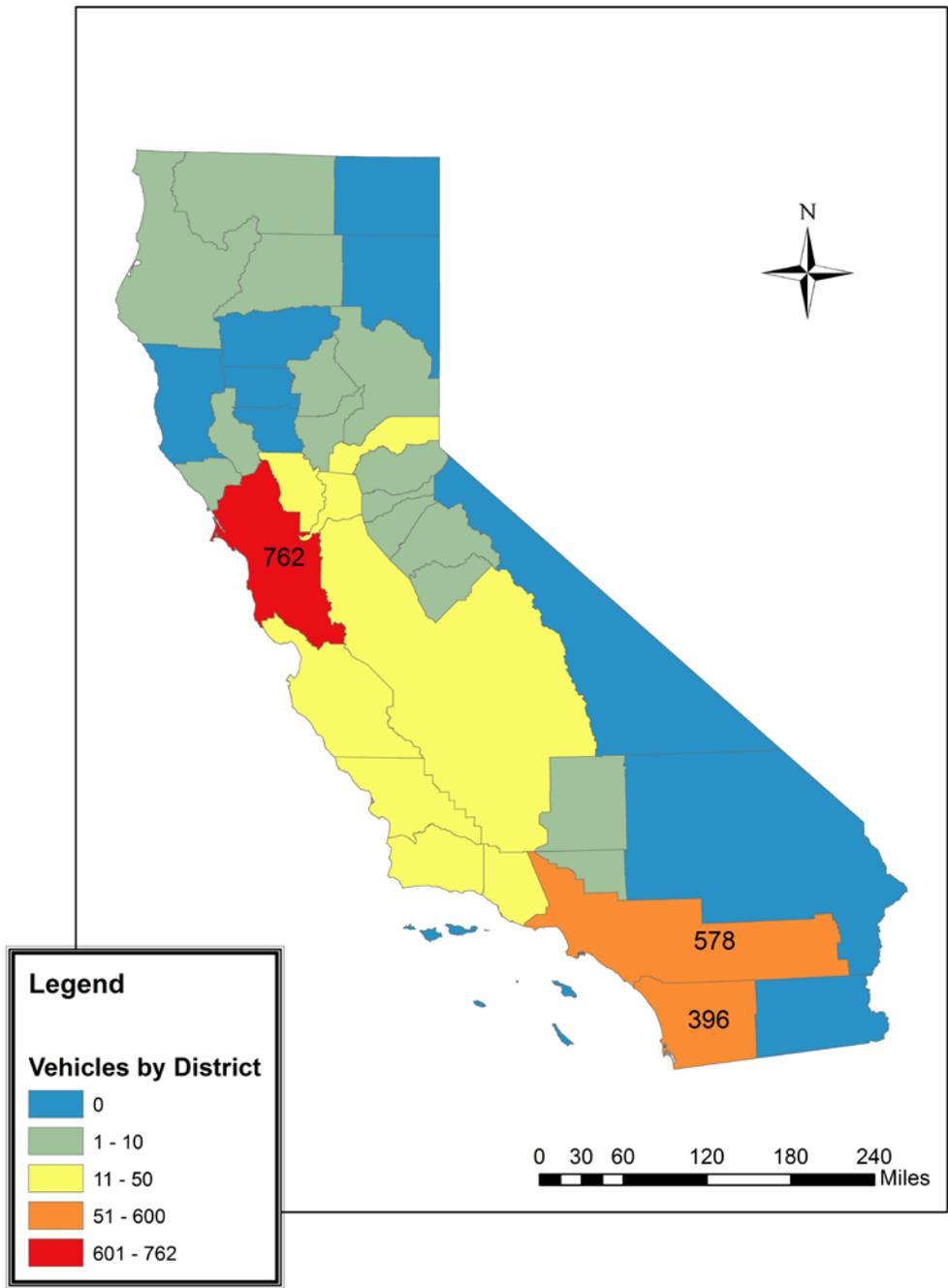


Exhibit 8: FY 2009-2011 CVRP Rebates by Vehicle Type and Model

Exhibit 8 shows CVRP rebates by vehicle type and model throughout the duration of FY 2009-2011, inclusive of funds provided by the California Energy Commission. As the table shows, the majority of rebates went to one vehicle category and one vehicle model, light duty zero emission vehicles and the Nissan LEAF, respectively.

Vehicle Type by Model	Number of Rebates	Percentage of Total Rebates	Total Dollars Allocated	Percentage of Total Dollars Allocated
Commercial Zero Emissions Vehicles	49	2.5%	\$980,000	10%
Navistar 2010 eStar 300 series	10	0.5%	\$200,000	2%
Smith 2009/2010 Newton1-9	39	2%	\$780,000	8%
Light-Duty Zero Emissions Vehicles	1849	93%	\$9,195,500	89%
Nissan LEAF SV/SL 2011	1730	87%	\$8,604,500	84%
Tesla Roadster 2009-2011	107	5%	\$535,000	5%
Honda 2010 FCX-Clarity	8	0.4%	\$40,000	0.39%
Smart USA ED Cabriolet and Coupe 2011	4	0.2%	\$16,000	0.16%
Neighborhood Electric Vehicles	38	2%	\$52,650	0.51%
GEM 2009-2011 e2	3	0.2%	\$3,000	0.03%
GEM 2009/2010 e4	3	0.2%	\$3,900	0.04%
GEM 2009/2010 eL	3	0.2%	\$4,050	0.04%
GEM 2009/2010 eS	3	0.2%	\$3,300	0.03%
GEM 2009/2010 eL-XD	4	0.2%	\$5,400	0.05%
Miles EV ZX40SAD 2009	21	1%	\$31,500	0.31%
Vantage 2010 EVX1000	1	0.1%	\$1,500	0.01%
Zero Emissions Motorcycles	44	2.5%	\$64,600	0.63%
Brammo 2010 Enertia	7	0.4%	\$10,500	0.10%
Vetrix MaxiScooter VX-1 2007-2011	3	0.1%	\$4,500	0.05%
Zero DS 2009-2011	34	2%	\$49,600	0.48%
TOTAL	1980	100%	\$10,292,750	100%

Exhibit 9: Summary of Rebates from California Energy Commission Funding

The tables in Exhibit 9 display a summary of rebate information for the additional funds provided by the California Energy Commission. The funding from the California Energy Commission was specifically dedicated to light-duty zero emission vehicles capable of freeway operation and certified for four or more passengers, which explains the lack of variation in vehicle type.

Rebates by Applicant Type

Type of Application	Number of Rebates
Private individual or sole proprietor	371
California Licensed Business	8
Non-profit organization	1
State government agency	1
Total	381

Rebates by Vehicle Classification

Vehicle Type	Number of Rebates	Total Dollars Allocated
Light-Duty Zero Emissions	381	\$1,877,000
TOTAL	381	\$1,877,000

Rebates by Air District

<i>Air District</i>	<i>Number</i>	<i>Air District</i>	<i>Number</i>
AMADOR COUNTY APCD	0	NORTHERN SONOMA COUNTY APCD	0
ANTELOPE VALLEY AQMD	1	PLACER COUNTY APCD	4
BAY AREA AQMD	139	SANTA BARBARA COUNTY APCD	4
BUTTE COUNTY AQMD	0	SISKIYOU COUNTY APCD	0
CALAVERAS COUNTY APCD	0	SOUTH COAST AQMD	124
EL DORADO COUNTY AQMD	1	SAN DIEGO COUNTY APCD	84
EASTERN KERN APCD	0	SHASTA COUNTY AQMD	1
FEATHER RIVER AQMD	1	SAN JOAQUIN VALLEY APCD	5
LAKE COUNTY AQMD	1	SAN LUIS OBISPO COUNTY APCD	1
MONTEREY BAY UNIFIED APCD	5	SACRAMENTO METRO AQMD	3
MARIPOSA COUNTY APCD	0	TUOLUMNE COUNTY APCD	0
MOJAVE DESERT AQMD	0	VENTURA COUNTY APCD	7
NORTH COAST UNIFIED AQMD	0	YOLO-SOLANO AQMD	0
NORTHERN SIERRA AQMD	0	TOTAL	381

Exhibit 10: CVRP Rebate Process Standard Operating Procedures

To ensure the timely redemption of rebates, CCSE will continue to process CVRP applications following the steps listed below:

- After an online application is received, CCSE staff evaluates and determines if the application is complete by verifying vehicle eligibility, purchase date, application date and vehicle identification number are provided.
- Once verified, CCSE staff use the online application system to reserve funds and send applicant an email notification with instructions to mail supporting documents to CCSE within 14 calendar days.
- After supporting documents are received, CCSE staff time stamps the application as complete.
- If the application is complete, CCSE staff assigns an account/approval number and stores the application in a secure on-site location. CCSE staff will also update the online file with the application received and approval date.
- Once the rebate check is prepared by the CCSE Controller, CCSE staff mails the rebate check to the applicant and updates the website to confirm completed application.
- If the application is incomplete, the applicant is contacted by phone, email or letter and informed of the information or documents needed in order to complete the application. Upon receipt of missing information or documents, the application is deemed complete and processing continues as outlined above.
- If the application is ineligible, the applicant is contacted by phone, email or letter denying the rebate and indicating the reason for the denial. At this time, CCSE staff will provide necessary information to individuals or organizations that wish to appeal a rebate denial.

Accounting Rebate Process

CVRP staff creates an invoice spreadsheet that includes application number, vehicle type, vehicle rebate amount, application name and address. On a weekly basis this invoice is reviewed by CVRP Program Manager, signed and sent to the CSSE Accounting Department.

- Checks are processed by Accounting Department and sent to Executive Director for signature.
- After checks have been signed, they are sent back to the Accounting Department where copies are made before being sent to CVRP staff.
- CVRP staff verifies the check contains the proper information and the check, including an approval letter prepared by CCSE staff, is sent to the applicant.

Exhibit 11: CVRP Vehicle Resale Standard Operating Procedures

The language below outline the necessary steps involved for the California Center for Sustainable Energy (CCSE) and the California Air Resources Board (ARB) to follow if notified of the resale of a rebated vehicle.

Step One: Notify CCSE of Vehicle Resale Request

If ARB is notified of vehicle resale request, ARB will contact CCSE with the applicant email and phone information and a brief description of the request.

Step Two: CCSE Document Vehicle Resale Request

Once notified by ARB or by a rebate recipient of interest in reselling a CVRP funded vehicle, CCSE will document the case on a resale request form which will then be provided to ARB:

1. Applicant contact information
2. Date when the individual applied for CVRP
3. Original rebate amount received
4. Vehicle Identification Number
5. Reason for vehicle resale
6. Status of vehicle resale

Step Three: ARB Review and Rule on Vehicle Resale Request

ARB program staff will review the resale request and any supporting documentation, and inform CCSE of staff's decision within 10 working days. If the resale request is granted, ARB will provide CCSE with the prorated rebate amount using the formula below.

Step Four: CCSE Notifies Applicant of ARB Ruling

CCSE will communicate ARB's decision to the individual requesting resale, including instructions for refunding the prorated amount of the rebate to CCSE if the resale request is granted.

Refunded rebates will be added back into the rebate funding pool.

Step Five: CCSE Notifies ARB of Applicant Refund

Once the prorated rebate amount is refunded back to the CVRP, CCSE will inform ARB. Additionally, CCSE will provide regular status reports until the refund is received.

Step Six: Coordination with Enforcement of CVRP Ownership Terms

ARB program staff is responsible for coordination with staff conducting periodic VIN checks of the DMV database for ownership compliance. Individuals that received resale approval from ARB will not be in violation of the CVRP ownership terms.