

**PROPOSED AB 118 AIR QUALITY IMPROVEMENT PROGRAM
FUNDING PLAN FOR FISCAL YEAR 2009-10**

APPENDICES

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These Appendices provide additional information regarding staff's proposed FY 2009-10 Funding Plan vehicle and equipment deployment and demonstration projects. A general overview of each of these proposed projects is presented in Chapter IV. Additional information regarding project solicitations, reporting, administration, and oversight can be found in the Proposed AB 118 Air Quality Improvement Program Guidelines, also to be considered by the Board at the April 23-24, 2009 Board meeting.

Appendix A-1: Hybrid Truck and Bus Voucher Incentive Project Q & A

What kind of hybrid trucks and buses are available today?

Dozens of hybrid truck and bus configurations from Freightliner Custom Chassis Corporation, International Truck and Engine Corporation, Kenworth Truck Company, Peterbilt Engine Corporation, and other manufacturers are available. These vehicles can be found in both public and private fleets and serve various functions, such as beverage and package delivery vehicles, utility vehicles, work vehicles, refuse trucks, school and transit buses, and line-haul trucks.

What are the criteria pollutant benefits of hybrid trucks and buses?

Dynamometer test data from a variety of hybrid heavy-duty truck and bus vehicle types indicates these vehicles can significantly reduce NOx emissions relative to their non-hybrid counterparts. The California Interim Certification Procedures for 2004 and Subsequent Model Hybrid Electric Vehicles, in the Urban Bus and Heavy-Duty Vehicle Classes assumes hybrid trucks and buses on average achieve a 25 percent reduction in NOx emissions relative to their non-hybrid counterparts.¹ This NOx emission benefit is consistent with the latest emissions test data for hybrid trucks and buses. Staff proposes continuing to use this assumed NOx benefit for HVIP in FY 2009-10. Staff does not recommend identifying a specific PM or ROG emissions benefit, since the emission benefits for these pollutants are less certain. Staff will utilize emissions test data submitted by manufacturers over the next year to update emission benefit assumptions for the HVIP as needed in the FY 2010-11 AQIP Funding Plan (assuming the Board approves continued funding for the HVIP).

How were vehicle voucher amounts determined?

The proposed HVIP voucher amounts reflect approximately half the current incremental purchase cost of these vehicles. This amount is based on the business case needed induce prospective vehicle buyers to consider buying a hybrid vehicle.

On average, fleets can make the business case to purchase a more expensive vehicle if the investment can be recouped within a three to five year period. Assuming the cost of diesel fuel is \$2.50 per gallon, it would take a typical hybrid truck or bus purchaser six to ten years to recoup the higher purchase cost of a new vehicle from the vehicle's fuel cost savings. An incentive for about half the incremental cost of a hybrid truck and bus purchase is needed to reduce the potential payback period accrued from fuel cost savings from six to ten years to three to five years.

Could local or federal incentive funds be mixed with HVIP funds?

The HVIP is intended to allow public agencies and private fleets to augment HVIP funds with their own funding. Examples of funds that could be combined with the HVIP include:

¹ California Air Resources Board, California Interim Certification Procedures for 2004 and Subsequent Model Hybrid Electric Vehicles, in the Urban Bus and Heavy-Duty Vehicle Classes, October 24, 2002.

- Lower-Emission School Bus Program: The Lower-Emission School Bus Program (LESBP) provides up to \$140,000 per bus to help replace an existing older school bus with a new diesel or alternative-fueled school bus. However, this funding amount is not likely to cover the cost of a hybrid school bus, which is typically about \$200,000. The HVIP would allow for LESBP and HVIP funds to be combined to pay for up to the full cost of a new hybrid school bus.
- Local Air District Funds: Local air districts may opt to augment HVIP vouchers with additional funding for hybrid trucks or buses in their district, effectively offering an additional buy-down of the vehicle incremental cost.
- Federal Stimulus Package: The American Recovery and Investment Act of 2009 has over \$1 billion in funds nationally for energy conservation and air quality improvement incentives. Local air districts, public agencies, and public fleets may combine federal hybrid truck and bus funding with HVIP funding to further buy-down the incremental cost of these vehicles. This ability to combine state and federal hybrid trucks and buses incentive funding will help ensure more federal dollars are directed to California fleets by further reducing the purchase price of these vehicles.

HVIP funds cannot be combined with Carl Moyer Program funds due to the Carl Moyer Program's enabling statute. Details regarding combination of HVIP funds with other funding sources are to be included in the HVIP solicitation.

Would urban transit buses be eligible for HVIP funding?

The Federal Transit Administration (FTA) provides grants for up to 80 percent of the incremental cost of a new urban transit bus. A bus receiving the federal grant is still eligible for the HVIP, but the HVIP voucher would be reduced to reflect half of the remaining incremental cost. For example, an urban bus that receives the full 80 percent grant from the FTA would be eligible for 20 percent of the full HVIP voucher amount.

Would plug-in hybrid trucks and buses be eligible for the HVIP?

Yes, plug-in hybrid vehicles that meet the definition of a hybrid truck or bus identified in Chapter IV are eligible for the HVIP. Staff will work with hybrid technology and vehicle manufacturers to ensure the HVIP solicitation includes project criteria to allow funding for plug-in medium- and heavy-duty hybrid vehicles.

Can truck and bus leasing companies receive an HVIP voucher?

Yes. However a vehicle leasing company that utilizes the HVIP must disclose the voucher amount to the lessee and ensure the lessee meets all applicable program requirements (including that the vehicle remain in California for three years).

Are hybrid trucks and buses required to be ARB-certified to be sold in California?

Medium-duty trucks and buses with 14,000 lbs or less gross vehicle weight rating (GVWR) are required to be ARB-certified to be sold in California. Heavy-duty trucks and buses (i.e. above 14,000 GVWR) are not required to be certified, but must use an ARB-certified engine. While heavy-duty hybrid vehicles are not required to be certified, ARB's certification helps validate the vehicle and engine durability and emission

reductions from the engine and after-treatment as utilized in the hybrid vehicle platform. Two hybrid heavy-duty vehicles (a Navistar utility truck and box van) have been ARB-certified as of March 15, 2009, and several others are undergoing the certification process.

Would ARB require that vehicles be ARB-certified to be eligible for the HVIP?

Medium-duty vehicles between 10,001 and 14,000 GVWR must be ARB-certified to be sold in California. Only ARB-certified vehicles in this medium-duty weight class would be eligible for funding.

Trucks and buses above 14,000 GVWR would have two options for becoming eligible for an HVIP voucher. First, hybrid trucks or buses which are ARB-certified as hybrid vehicles would be eligible for an HVIP voucher. Secondly, trucks and buses on the IRS list of vehicles eligible for a federal tax credit would be eligible for funding if they meet additional ARB criteria to ensure the vehicle emission reductions are achieved and maintained. These additional criteria for non-certified heavy-duty hybrids are:

1. The vehicle must use a California certified engine.
2. The engine and vehicle primary intended service class must match (i.e. a light heavy-duty diesel engine is used in a vehicle with a GVWR of 14,001-19,500 lbs, a medium heavy-duty diesel engine is used in a vehicle with a GVWR of 19,501-33,000 lbs., and a heavy heavy-duty diesel engine is used in vehicle with a GVWR of > 33,000 lbs.). A vehicle whose GVWR is within ten percent of matching the engine's intended service class could still be eligible on a case-by-case basis.
3. No modifications have been made to the engine hardware and related after-treatment. The vehicle must meet the engine manufacturer's build requirements.
4. No modifications have been made to the engine software calibrations. The vehicle must meet the engine manufacturer's build requirements.
5. The hybrid vehicle operation must not change the engine's certified regeneration cycles/events for emission control devices such as filters (vehicle must be representative of engine's regeneration adjustment factors).
6. The hybrid vehicle operation is capable of meeting the engine's temperature requirements.
7. The engine's auxiliary emission control device (AECD) criteria must remain the same during hybrid operations. (The hybrid vehicle must not operate most of the time in modes where AECDs reduce the effectiveness of emission controls.)

ARB staff will work with vehicle manufacturers and other stakeholders prior to issuing the HVIP solicitation to determine how the above criteria can be reported in a simple and user-friendly manner.

What is ARB's process for certifying a medium- or heavy-duty hybrid vehicle?

ARB's medium- and heavy-duty hybrid vehicle certification process is intended to demonstrate the emission control systems durability and emission standards compliance of the auxiliary power unit (APU) and hybrid powertrain and battery systems

for the useful life of the hybrid vehicle. The certification and test procedures for certifying a hybrid medium-duty vehicle (under the chassis test procedure) can be found at: www.arb.ca.gov/msprog/levprog/cleandoc/clean_2003_zev_tps.pdf. The certification and test procedures for certifying a hybrid heavy-duty vehicle is available at: www.arb.ca.gov/regact/bus02/ip.pdf. For more information regarding ARB certification of hybrid trucks and buses, please contact Tom Chang at (626) 575-6809 or ychang@arb.ca.gov, or Tsatsu Nukunya at (626) 350-6424 or tnukunya@arb.ca.gov.

What hybrid truck and bus types have been approved by the IRS to receive a federal tax credit?

Private fleets that purchase a new hybrid heavy-duty truck or bus are eligible to receive a federal tax credit of between \$3,000 and \$12,000, depending upon the vehicle's fuel economy benefits. Appendix A-2 lists the vehicles eligible for this credit as of March 1, 2009. Staff recommends that receipt of this federal tax credit not impact a vehicle's eligibility for an HVIP voucher or the eligible voucher amount.

Why would participating hybrid trucks and buses be required to operate in California 100 percent of the time?

The HVIP is intended to be as straightforward and simple as possible for vehicle purchasers, with the recordkeeping and monitoring requirements needed to ensure program benefits for California. Compliance with a requirement that a vehicle remain in California 100 percent of the time is easier to report, verify, and enforce than a requirement for some lesser percentage. The vast majority of vehicles participating in the HVIP in FY 2009-10 are likely to be urban work vehicles, delivery vans, and other vehicles that wouldn't typically travel out of state. Staff is committed to working with stakeholders prior to issuing project solicitations to evaluate whether to provide case-by-case flexibility for fleets operating near border regions or in other specific situations.

What would the vehicle purchaser reporting requirements be for the HVIP?

Hybrid truck and bus purchasers must submit a usage survey annually for three years. This brief survey will help verify funded vehicles are being kept in California, and be used in estimating program emission benefits.

How can ARB ensure that the voucher amount will be disbursed to dealers or vehicle purchasers quickly?

Dealers are more likely to deduct the HVIP voucher amount from the vehicle purchase price and allow the purchaser to take possession of a vehicle if the HVIP reimburses the dealer within one to two weeks. The HVIP must therefore turn around voucher payment requests from dealers quickly in order for the project to be successful. In order to ensure voucher payments are not delayed, the project administrator would be advanced up to ten percent of HVIP funding at project inception and adequate additional funds as needed monthly from ARB to immediately pay off voucher requests from dealers, without having to go to ARB for payment reimbursement. The HVIP solicitation and grant agreement would include additional criteria to ensure the project is streamlined enough to meet participants needs and that project funds are safeguarded.

Who would be eligible to apply for this project?

ARB would issue an HVIP solicitation to select an entity to implement the HVIP. The HVIP solicitation would be open individuals, federal, state, or local government entities or agencies, and organizations with California heavy-duty vehicle, vehicle incentive program, or air quality expertise. An implementing agency would be chosen by ARB via a competitive solicitation and be responsible for running the HVIP statewide. The selected entity would also be responsible for project outreach, with outreach efforts focused on those air basins with the worst air quality.

Is there a match funding requirement for this project?

The entity selected to implement this project would not be required to provide matching funds. However, applicants could choose to increase their project competitiveness by offering match funds or in-kind services.

What criteria is staff recommending be used to score applications for this project?

Applications to implement the HVIP would be evaluated and scored according to criteria identified in Table A-1.

Table A-1: Scoring Criteria for HVIP Applications

| Scoring Criteria | Points |
|--|---------------|
| Demonstrable Resources and Experience with Hybrid Technology, Manufacturers and Vendors to Successfully Implement a California Statewide Program | 40 |
| Project Implementation Plan | 15 |
| Match Funding/In-Kind Services | 15 |
| Application Completeness | 10 |
| Contribution to Regional Air Quality Improvements | 5 |
| Potential Emission Reductions | 5 |
| Cost-Effectiveness | 5 |
| Ability to Promote the Use of Alternative Fuels and Vehicle Technologies | 5 |
| TOTAL | 100 |

The Proposed Air Quality Improvement Program Guidelines – also to be considered by the Board at the April 23-24, 2009 Board hearing – include additional information regarding project solicitations and project application evaluation and scoring requirements.

**Appendix A-2:
Heavy-Duty Hybrids Eligible for Federal Tax Incentives
(as of March 3, 2009)**

| Azure Dynamics (AZD) | | |
|-----------------------------|--|-----------------------------|
| Model Year | Vehicle Description | Gross Vehicle Weight |
| 2008 | Ford E-450 Stripped or Cutaway Chassis Equipped with an Azure Dynamics Parallel Hybrid Electric System | 14,050 lbs |

| Kenworth Truck Company/Eaton Corporation | | |
|---|--|-----------------------------|
| Model Year | Vehicle Description | Gross Vehicle Weight |
| 2008 | Kenworth Model T270 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2008 | Kenworth Model T370 Utility Boom Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2008 | Kenworth Model T270 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2008 | Kenworth Model T370 Package Delivery Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Kenworth Model T270 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Kenworth Model T270 Utility Boom Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Kenworth Model T370 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Kenworth Model T370 Utility Boom Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Kenworth Model T270 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Kenworth Model T270 Package Delivery Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Kenworth Model T370 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Kenworth Model T370 Package Delivery Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |

**Heavy-Duty Hybrids Eligible for Federal Tax Incentives
(Continued)**

| Navistar, Inc./Eaton Corporation | | |
|---|--|-----------------------------|
| Model Year | Vehicle Description | Gross Vehicle Weight |
| 2008 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13 GSC w/GVW 14,001-26,000 | 14,001-26,000 lbs |
| 2009 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13 GSC w/GVW 14,001-26,000 | 14,001-26,000 lbs |
| 2008 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13 GSC w/GVW 26,000-33,000 lbs | 26,001-33,000 lbs |
| 2009 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13 GSC w/GVW 26,000-33,000 lbs | 26,001-33,000 lbs |
| 2008 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13GSB 14,000-26,000 | 14,001-26,000 lbs |
| 2009 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13GSB 14,000-26,000 | 14,001-26,000 lbs |
| 2008 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13GSB 6,000-33,000 lbs | 26,001-33,000 lbs |
| 2009 | Navistar International DuraStar Hybrid Truck Model MA 02500 Equipped with an Eaton 10 HEV Hybrid System 13GSB 6,000-33,000 lbs | 26,001-33,000 lbs |
| 2008 | Navistar International 3200 Bus Model PC 01500 Equipped with an Eaton 10HEV Hybrid System 13GSB 14,000-26,000 lbs GVW | 14,001-26,000 lbs |
| 2009 | Navistar International 3200 Bus Model PC 01500 Equipped with an Eaton 10HEV Hybrid System 13GSB 14,000-26,000 lbs GVW | 14,001-26,000 lbs |
| 2008 | Navistar International 3200 bus Model PC 01500 Equipped with an Eaton 10HEV Hybrid System 13GSB 26,001-33,000 GVW | 26,001-33,000 lbs |
| 2009 | Navistar International 3200 bus Model PC 01500 Equipped with an Eaton 10HEV Hybrid System 13GSB 26,001-33,000 GVW | 26,001-33,000 lbs |
| 2009 | Navistar IC Bus HC Series Commercial transit Bus Equipped with an Eaton 10HEV Hybrid System 13GSB GVW 14,001-26,000 lbs | 14,001-26,000 lbs |
| 2009 | Navistar IC Bus HC Series Commercial transit Bus Equipped with an Eaton 10HEV Hybrid System 13GSB GVW 26,001-33,000 lbs | 26,001-33,000 lbs |

**Heavy-Duty Hybrids Eligible for Federal Tax Incentives
(Continued)**

| Navistar/IC Bus LLC | | |
|----------------------------|--|-----------------------------|
| Model Year | Vehicle Description | Gross Vehicle Weight |
| 2008 | Navistar IC Bus Model PB10500 CE Series Hybrid School Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 14,001-26,000 lbs | 14,001-26,000 lbs |
| 2008 | Navistar IC Bus Model PB10500 CE Series Hybrid School Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 26,001-33,000 lbs | 26,001-33,000 lbs |
| 2009 | Navistar IC Bus Model PB10500 CE Series Hybrid School Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 14,001-26,000 lbs | 14,001-26,000 lbs |
| 2009 | Navistar IC Bus Model PB10500 CE Series Hybrid School Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 26,001-33,000 lbs | 26,001-33,000 lbs |
| 2008 | Navistar IC Bus Model PC10500 CE Series Commercial Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 14,001-26,000 lbs | 14,001-26,000 lbs |
| 2008 | Navistar IC Bus Model PC10500 CE Series Commercial Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 26,001-33,000 lbs | 26,001-33,000 lbs |
| 2009 | Navistar IC Bus Model PC10500 CE Series Commercial Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 14,001-26,000 lbs | 14,001-26,000 lbs |
| 2009 | Navistar IC Bus Model PC10500 CE Series Commercial Bus Equipped with the Enova Charge Depleting Hybrid Drive System GVW 26,001-33,000 lbs | 26,001-33,000 lbs |

**Heavy-Duty Hybrids Eligible for Federal Tax Incentives
(Continued)**

Peterbilt Motors Co./Eaton Corporation

| Model Year | Vehicle Description | Gross Vehicle Weight |
|-------------------|--|-----------------------------|
| 2008 | Peterbilt Model 330 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2008 | Peterbilt Model 335 Utility Boom Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2008 | Peterbilt Model 330 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2008 | Peterbilt Model 335 Package Delivery Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Peterbilt Model 330 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Peterbilt Model 330 Utility Boom Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Peterbilt Model 335 Utility Boom Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Peterbilt Model 335 Utility Boom Vehicle with GVW > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Peterbilt Model 330 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Peterbilt Model 330 Package Delivery Vehicle with GVW of > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |
| 2009 | Peterbilt Model 335 Package Delivery Vehicle with GVW of 19,501-26,000 lbs and Equipped with Eaton Hybrid System | 19,501-26,000 lbs |
| 2009 | Peterbilt Model 335 Package Delivery Vehicle with GVW > 26,000 lbs and Equipped with Eaton Hybrid System | >26,000 lbs |

Appendix B: Clean Vehicle Rebate Project Q & A

What is the Alternative Fuel Vehicle Incentive Program (AFVIP) and how does it relate to the Clean Vehicle Rebate Project?

Staff's proposed Clean Vehicle Rebate Project would be implemented much like the existing AFVIP. The ARB developed the AFVIP as part of the \$25 million Alternative Fuel Incentive Program in FY 2006-07. The AFVIP made available approximately \$2.9 million in rebates to consumers for the purchase of zero-emission, plug-in hybrid, and alternative fuel light-duty vehicles. The grant was awarded to the Center for Sustainable Energy to conduct public outreach and provides and redeems vehicle rebates. To date the program has been oversubscribed, with funds sunsetting in June 2009. Additional information regarding the AFVIP may be found at:

<http://www.energycenter.org/ContentPage.asp?ContentID=473&SectionID=508>

How would the Clean Vehicle Rebate Project be implemented?

This project structure would be similar to that of the AFVIP. ARB would issue a competitive solicitation to select a grantee. It would be the grantee's responsibility to implement the Clean Vehicle Rebate Project statewide in accordance with the requirements of the solicitation and the subsequent grant agreement. Staff recommends that up to ten percent of the available funds be allowed for project administration. The grantee will be responsible for implementing the program, including:

- 1) Communicate with vehicle dealers and purchasers;
- 2) Develop and maintain website with the most current eligible vehicle list and rebate request forms;
- 3) Communicate with the ARB to ensure the use of the most current vehicle eligibility list;
- 4) Verify eligibility of rebate requests and vehicles;
- 5) Review and approve or disapprove rebate requests;
- 6) Verify that all required information has been submitted prior to rebate disbursement;
- 7) Authorize rebate disbursements;
- 8) Track program status, including funding allocations;
- 9) Submit reports on program status to the ARB Program Manager

What are the similarities and differences between the AFVIP and the proposed AQIP Clean Vehicle Rebate Project?

Table B-1 compares and contrasts the AFVIP and the proposed Clean Vehicle Rebate Project.

**Table B-1:
Comparison of the AFVIP and the Proposed AQIP Clean Vehicle Rebate Project**

| Program Area | AFVIP | Clean Vehicle Rebate Project |
|------------------------|---|---|
| Funding Source | AB 1811 | AB 118 |
| Timeline | Fiscal year 2006-2007; sunsets June 2009 | Fiscal year 2009-10 (may be extended in future Funding Plans) |
| Total Funding | \$2.9 million | \$5 million |
| Vehicles Covered | Zero-emission passenger vehicles, neighborhood electric vehicles, and motorcycles; plug-in hybrid passenger vehicles; and CNG passenger vehicles | Zero-emission passenger vehicles, neighborhood electric vehicles, and motorcycles; plug-in hybrid passenger vehicles; and zero-emission commercial vehicles |
| Project Implementation | California Center for Sustainable Energy | To be determined through competitive solicitation |
| Rebate per Vehicle | Reflects 10 percent of MSRP or 50 percent incremental cost | Same as AFVIP, except for PHEVs (\$3,000/vehicle) and zero-emission commercial vehicles (\$20,000/vehicle) |

How does a vehicle get listed as eligible for a rebate?

For placement on the qualifying vehicle list, vehicles must:

- 1) be a new vehicle, as defined in California Vehicle Code (CVC) Section 430 , and manufactured by the Original Equipment Manufacturer (OEM) or its authorized licensee;
- 2) be ARB certified as a new electric vehicle;
- 3) comply with all applicable federal safety standards for new motor vehicles and new motor vehicle equipment issued by the National Highway Traffic Safety Administration (NHTSA)²;
- 4) be capable of the following prescribed performance, emissions, and service thresholds:
 - a) Full function zero-emission vehicles (FFZEVs) and city electric vehicles (CEVs) must be certified as Type I, II or III ZEVs as defined in the California ZEV Regulation³.
 - b) PHEVs must meet Super Ultra Low Emission Vehicle (SULEV) emission standards as defined in the California ZEV Regulation.
 - c) FFZEVs, CEVs and PHEVs must be capable of operating on the highway.

² The federal motor vehicle safety standards are found in Title 49 of the Code of Federal Regulations (CFR) Part 571.

³ California ZEV Regulation can be found in Section 1962(e), Title 13, California Code of Regulations (CCR).

- d) NEV's must successfully complete the NEV America assessment which includes meeting all minimum vehicle requirements specified in the NEV America Technical Specifications⁴ (Revision 3, dated September 1, 2007) and the acceleration, top speed, and constant speed range performance specifications; and
- 5) include, at a minimum, vehicle drive train manufacture warranty covering applicable energy storage tanks or a battery pack.

Vehicle models would be approved by ARB staff on a model year basis and placed on a List of Qualifying Vehicle Models for Clean Vehicle Rebates.

What would be the requirements for leased vehicles?

Leased vehicles would have to be leased for a minimum term of 36 months and the rebate applicant must be the lessee.

Would the Clean Vehicle Rebate Project be surplus to the California ZEV Regulation?

The California ZEV Regulation places requirements on vehicle manufacturers, not consumers. This project is focused on expanding the pool of willing consumers for zero-emission and plug-in hybrid vehicles. At the March 27, 2008 Board hearing for the California Zero-Emission Vehicle Regulation, ARB staff indicated that consumer incentives would be needed bring the ZEV mandate to fruition, and the Board acknowledged a need for incentives to bridge the gap into full commercialization of these vehicles.

Who would qualify for a rebate?

To qualify for a rebate, an individual, business, non-profit organization, federal, state, regional or local government agency would have to meet the following criteria:

- 1) be a California resident;
- 2) lease or purchase a new eligible vehicle and request a rebate before funding is depleted;
- 3) register the vehicle in California at the time of lease or purchase; and
- 4) be prepared to demonstrate that the vehicle will be registered in and driven in California for at least 36 months.

How would I be able to find out if the vehicle I intend to purchase is eligible for a rebate?

A website will be available to the public which will provide clear direction as to what vehicles qualify for rebates as well as the corresponding rebate amounts. In addition, a toll-free information line will be provided to assist consumers.

How were the recommended vehicle rebate amounts determined?

The maximum rebate amounts, as identified in Table IV-2, generally mirror those used in the AFVIP. The actual rebate amount will be the greater amount of either ten percent of the manufacturer's suggested retail price (MSRP) or fifty percent of the incremental difference in cost between the qualifying vehicle and a comparable internal combustion

⁴ Specifications are available at: <http://avt.inl.gov/pdf/nev/nevtechspec.pdf>

engine vehicle, up to the maximum rebate amount for that vehicle type as shown in Table IV-2.

Staff also considered basing rebates for light-duty battery-electric vehicles on the vehicle's battery pack capacity. While this option would provide higher rebates for those vehicles with higher capacity and cost, staff is still evaluating whether this is the best mechanism for incentivizing vehicle performance. Staff is therefore proposing the Clean Vehicle Rebate Project utilize the existing AFVIP rebate structure in FY 2009-10. Staff will continue to evaluate performance-based rebates for potential inclusion in the FY 2010-11 Funding Plan.

Could I get a rebate through the Clean Vehicle Rebate Project for a vehicle I purchased that is on the waiting list for an AFVIP rebate?

No. The program guidelines for the AFVIP state that the new vehicle must be purchased or leased and the rebate application must be received by the Project Administrator before funding is depleted. The Clean Vehicle Rebate Project is modeled after the AFVIP but falls under a separate program and with a different funding source, so this project would not provide rebates to vehicles that have already been purchased. This approach mirrors that of ARB's other incentive programs such as the Carl Moyer Program, and would allow the AQIP to fund more vehicles. The Clean Vehicle Rebate Project solicitation and corresponding guidelines will provide information on vehicle qualifications, including date of purchase requirements.

Could other incentives be combined with these rebates?

Rebates could be combined with federal and local agency incentives (including tax incentives) to help further buy-down an eligible vehicle's incremental cost.

Is infrastructure eligible for Clean Vehicle Rebate Project funding?

Infrastructure is not one of the specific project categories AB 118 authorizes the AQIP to fund (see Chapter 1 for the eight eligible project categories). AB 118 does allow the Energy Commission program to fund light-duty vehicle infrastructure. The Energy Commission draft Investment Plan includes electric vehicle and hydrogen fueling infrastructure as a targeted project category.⁵

Would applicants be required to provide match funding to be eligible to implement the project?

No. Match funding would not be required, but would improve a project applicant's score during the evaluation process.

How would the Clean Vehicle Rebate Project solicitation work?

ARB would issue a competitive solicitation to entities that wish to implement the Clean Vehicle Rebate Project once the State budget has been approved. The solicitation would provide all information applicants will need to apply to implement the project. Applicants would be scored based on the scoring criteria described in

⁵ California Energy Commission, Investment Plan for the Alternative and Renewable Fuel and Vehicle Technology Program – Draft Staff Paper, Publication # CEC-600-2008-007-D-REV1, December 23, 2008.

Table B-2 (below). The maximum project score is 100 points. The qualified applicant with the highest overall score would be selected to implement the Clean Vehicle Rebate Project and be responsible for distributing rebates to qualified vehicle purchasers.

Table B-2: Scoring Criteria for Clean Vehicle Rebate Project Applications

| Scoring Criteria | Points |
|---|---------------|
| Demonstrable Resources and Experience to Successfully Implement the Project | 40 |
| Project Implementation Plan | 15 |
| Match Funding/In-Kind Services | 15 |
| Application Completeness | 10 |
| Contribution to Regional Air Quality Improvements | 5 |
| Potential Emission Reductions | 5 |
| Cost-Effectiveness | 5 |
| Ability to Promote the Use of Alternative Fuels and Vehicle Technologies | 5 |
| TOTAL | 100 |

The Proposed Air Quality Improvement Program Guidelines – also to be considered by the Board at the April 23-24, 2009 Board hearing – include additional information regarding project solicitations and project application evaluation and scoring requirements.

Appendix C: Lawn and Garden Equipment Replacement (LGER) Project Q & A

Is lawn and garden equipment a significant source of emissions?

Yes. Lawn and garden equipment contribute approximately 45 percent of reactive organic gas (ROG), 3 percent of oxides of nitrogen (NO_x), and 5 percent of PM emitted from off-road equipment statewide (ARB's Off-Road Model).

Why would only new cordless zero-emission lawn and garden equipment be eligible for LGER funding?

Funding cordless zero-emission (e.g. battery-powered) lawn and garden equipment would allow cordless zero-emission equipment to be more cost competitive with internal combustion equipment and accelerate this technology's deployment in California. Air districts would still be able to fund other types of equipment with their local lawn and garden program funds.

What air districts would be eligible for this project and why?

All non-attainment air districts would be eligible to apply for LGER funding. Districts with the worst air quality would receive additional points in project evaluations. Eligible air districts and their designations are identified in Table C-1.

Table C-1: California Air District Federal 8-Hour Ozone Designation

| Air District | Federal 8-Hour Ozone Designation/Classification* |
|--|---|
| South Coast AQMD San Joaquin Valley APCD | Extreme |
| Antelope Valley AQMD Mojave Desert AQMD | Severe-17 |
| Sacramento Metropolitan AQMD Yolo-Solano AQMD El Dorado AQMD Placer County APCD Feather River AQMD | Severe-15 |
| Ventura County APCD | Serious |
| San Diego APCD Imperial County Northern Sierra AQMD (western Nevada County) Amador County APCD Calaveras County APCD Tuolumne County APCD Mariposa County APCD | Moderate |
| Bay Area AQMD | Marginal |

* Designations are based on proposed or final U.S. EPA designations, or designation requests submitted to the U.S. EPA by ARB. The list of eligible districts will be updated based on proposed or final designation/classification at time of project solicitation.

How would this project be administered?

Local air districts would apply for funding via a competitive solicitation. Districts could use LGER funding to augment their current lawn and garden equipment replacement programs.

How would the eligible funding amount for each air district be determined?

Each qualifying district's residential walk-behind mower population (according to ARB's Off-Road Model) would be weighted by that district's project application score to apportion the total available funds.

What parts of the state have the most residential lawn mowers?

Almost half of California's residential walk-behind mowers are located in the South Coast Air Quality Management District, with a significant number of mowers also located in the Bay Area, San Diego, and San Joaquin Valley. Table C-2 provides data regarding how these mowers are distributed statewide.

**Table C-2:
Residential Walk-Behind Lawn Mower Population**

| Air District | Residential Walk-Behind Lawn Mower Population | Percent of Total Population |
|---------------------|--|------------------------------------|
| South Coast | 2,102,000 | 49% |
| Bay Area | 874,000 | 20% |
| San Diego | 460,000 | 11% |
| San Joaquin Valley | 336,000 | 8% |
| Sacramento | 171,000 | 4% |
| Ventura | 119,000 | 3% |
| Other Districts | 221,000 | 5% |
| TOTAL | 4,283,000 | 100% |

Residential lawn mower population data is based on ARB's Off-Road Model (2007). Data rounded to the nearest thousand mowers

Would there be a match requirement for this project?

The LGER project would require a 1:1 match for local air districts who receive funding. ARB would provide districts with up to one dollar toward their local program for every dollar a district spends on a cordless electric lawn mower. Districts could receive more points on their project applications by offering more than the minimum required match funding.

What information would be included in the LGER project solicitation?

The project solicitation for the LGER will include additional administrative requirements, implementation milestones, reporting and match requirements, and project oversight responsibilities. This LGER is intended to complement existing local programs and LGER will therefore provide for more implementation flexibility than criteria for other AQIP project categories.

What criteria would be used to score applications for this project?

Applications would be evaluated and scored based on the criteria identified in Table C-3.

Table C-3: Scoring Criteria for LGER Project Applications

| Scoring Criteria | Points |
|--|---------------|
| Federal 8-hour Ozone Classification* <ul style="list-style-type: none"> ▪ Extreme – 40 points ▪ Severe-17 – 30 points ▪ Severe-15 – 20 points ▪ Serious – 10 points ▪ Moderate or Marginal – 0 points | 40 |
| Project Implementation Plan – Demonstrate Success with Current Lawn and Garden Replacement Program | 15 |
| Contribution to Regional Air Quality Improvements | 10 |
| Potential Emission Reductions | 10 |
| Cost-Effectiveness | 10 |
| Application Completeness | 10 |
| Ability to Promote the Use of Alternative Fuels and Vehicle Technologies | 5 |
| TOTAL | 100 |

*Based on U.S. EPA classifications identified in Table C-1.

The Proposed Air Quality Improvement Program Guidelines – also to be considered by the Board at the April 23-24, 2009 Board hearing – include additional information regarding project solicitations and project application evaluation and scoring requirements.

Appendix D. Zero-Emission Agricultural UTV Rebate Project Q & A

Are agricultural UTVs a significant source of criteria pollutant emissions?

Yes. ATVs and UTVs are the second most frequently used piece of equipment in California's agricultural sector, second only to the tractor.⁶ California regulations now require these vehicles to have a four-stroke off-road engine, which is far less polluting than a two-stroke engine, but still eleven times more polluting than a car engine.

How was the project funding amount determined?

The \$1.3 million staff recommends for this project was derived using estimates of: 1) production and sales projections from existing electric UTV manufacturers; 2) potential consumer demand based on feedback received during ARB-sponsored working group sessions in January and February of 2009; 3) variations in manufacturer suggested retail price (MSRP) for work UTVs; and 4) expected program administration costs.

Why are recreational vehicles not eligible for funding?

Recreation is a discretionary vehicle use, whereas agriculture and other commercial applications contribute directly to the sustainability and vitality of the state's economy. The prevalent use of gas-powered UTVs in the agricultural sector lends itself to immediate and significant emission reductions of criteria pollutants from a change to zero-emission technology. Additionally, much of the state's agricultural activities are centered in non-attainment air basins that would need additional emission reductions to meet federal and state ambient air quality standards.

Why is ARB proposing to limit this project to agricultural work vehicles?

Staff believes the timing is right to incentivize deployment of these vehicles in agricultural operations, where zero-emission technologies are just beginning to gain a market niche. This rebate project will send a signal to vehicle manufacturers and potential purchasers that will help bring down production and purchase costs and accelerate vehicle deployment.

State law requires FY 2009-10 AQIP funds be fully expended by July 1, 2012. Staff recommends the Board allow flexibility for this project to be expanded to allow funding other types of zero-emission work ATVs and UTVs if a project midcourse review (no later than January 1, 2012) indicates eligibility expansion would help ensure project funds are expended by the statutory deadline.

⁶ Baker, R. 2008. Characterization of the off-road equipment population. Final report prepared for the California Air Resources Board and the California Environmental Protection Agency. ARB Contract No. 04-315 (This study did not discriminate between UTVs and ATVs, but rather included both in the general category of an ATV)

How would ARB ensure that prospective consumers will use vehicles eligible for rebate for agricultural work purposes within the state?

In addition to the vehicle eligibility criteria, consumer requirements for rebate eligibility will also be detailed in the solicitation, and may include, but is not limited to:

- Proof of California residency, or proof that the agricultural operation for which the UTV would be used occurs in California
- Self-certification that the vehicle would be used for agricultural purposes within California, with rebate revocation for false certification

How would an agricultural operation be defined for the purposes of this project?

Staff is proposing for the purposes of the Zero-Emission Agricultural UTV Rebate Project to use the definition of agricultural operations from ARB's Regulation for in-Use Off-Road Diesel Vehicles⁷:

“Agricultural operations” means (1) the growing or harvesting of crops from soil (including forest operations), and the raising of plants at wholesale nurseries, but not retail nurseries, or the raising of fowl or animals for the primary purpose of making a profit, providing a livelihood, or conducting agricultural research or instruction by an educational institution, or (2) agricultural crop preparation services such as packinghouses, cotton gins, nut hullers and processors, dehydrators, and feed and grain mills. Agricultural crop preparation services include only the first processing after harvest, not subsequent processing, canning, or other similar activities. For forest operations, agricultural crop preparation services include milling, peeling, producing particleboard and medium density fiberboard, and producing woody landscape materials.

What electric work UTVs are currently commercially available?

Several manufacturers currently offer electric work UTV products, including Toro, John Deere, Barefoot Motors and ZAP!

How would the project be administered?

The project would be administered by an air district, not-profit organization or public entity selected through a competitive solicitation process.

Would there be a match funding requirement for this project?

No. There is no match funding requirement, however the scoring criteria reflects a selection preference for entities willing to provide match funding or in-kind services to augment the rebate amount.

What criteria would be used to competitively rank Zero-Emission Agricultural UTV Rebate Project applicants?

⁷ ARB, Final Regulation Order for In-Use Off-Road Diesel Vehicles, Adopted July 26, 2007; www.arb.ca.gov/msprog/ordiesel/ordiesel.htm.

Following release of the project solicitation, prospective applicants would be ranked using the selection criteria and corresponding point scores presented in Table D-1 (below).

Table D-1: Zero-Emission Agricultural UTV Rebate Project Scoring Criteria

| Scoring Criteria | Points |
|---|---------------|
| Demonstrable Resources and Experience to Successfully Implement the Project | 40 |
| Project Implementation Plan | 15 |
| Match Funding/In-Kind Services | 15 |
| Application Completeness | 10 |
| Contribution to Regional Air Quality Improvements | 5 |
| Potential Emission Reductions | 5 |
| Cost-Effectiveness | 5 |
| Ability to Promote the Use of Alternative Fuels and Vehicle Technologies | 5 |
| TOTAL | 100 |

The Proposed Air Quality Improvement Program Guidelines – also to be considered by the Board at the April 23-24, 2009 Board hearing – include additional information regarding project solicitations and project application evaluation and scoring requirements.

Appendix E: Advanced Technology Demonstration Projects

How were the proposed funding amounts for AQIP demonstration projects determined?

The allocation for each demonstration project is based on expected funding needed to implement demonstration project concepts identified in the November 2008 to February 2009 AQIP Work Group meetings.

Why does staff recommend funding a medium horsepower (hp) locomotive demonstration project?

Medium horsepower (MHP) locomotives (between 2,301 to 3,800 hp) typically operate in intrastate service and travel throughout California. Demonstration of advanced technologies for these locomotives can lead to industry-wide adoption, providing significant emission reductions. Technologies enabling the 400 existing MHP locomotives in the state to meet the Low-Emitting Locomotive emission level (4.0 g /bhp-hr NO_x and 0.10 g/bhp-hr PM) would achieve up to 23 tpd NO_x and 1.25 tpd PM statewide.⁸

What is a hybrid marine vessel?

Significant technological advancements in emission reducing technology have already been made in the marine vessel category. Hybrid marine vessels use a diesel engine to turn an electrical generator which provides electricity for a propulsion motor and for auxiliary loads. One retrofitted hybrid excursion vessel will soon be commercially operating in the San Francisco Bay and a hybrid tugboat will soon be operating at the Ports of Los Angeles and Long Beach.

Why is ARB proposing to fund an agricultural equipment demonstration project in addition to an off-road demonstration project?

The agriculture equipment category provides an opportunity to demonstrate cutting edge, cleaner technology in a sector that relies heavily on long-lived diesel-fueled equipment. A significant population of agriculture vehicles and equipment operate in the San Joaquin Valley and other parts of the state that do not meet federal air quality standards for ozone and particulate matter. Demonstrated new technologies in the agriculture sector could also have applications in other off-road equipment and non-mobile applications.

Will ARB coordinate with the California Highway Patrol (CHP) in implementing the school bus demonstration project?

Yes. School buses are required to meet specific state and federal motor vehicle safety requirements designed to protect school children being transported statewide. The CHP has the final determination of compliance with applicable regulations and the issuance of safety certifications allowing the transport of student on school buses. ARB staff will work closely with CHP, the Energy Commission and school bus stakeholders to insure that any potential school bus demonstration project meets established safety

⁸ ARB, Preliminary Draft Technical Options to Achieve Additional Emissions and Risk Reductions from California Railroads, December 2008, www.arb.ca.gov/railyard/ted/122208ted.pdf

requirements for the transport of school children from home to school. Since the goal of AQIP demonstration projects is to demonstrate vehicles and equipment that can gain significant market penetration, a valid CHP safety certification (CHP form 292) will be needed to consider a school bus project a success.

How would a demonstration project be administered?

Local air districts and other public agencies are eligible to apply for demonstration project funds. Interested air districts and other public agencies could submit project applications in one of two ways:

- Applicants could team with an advanced technology provider to request funding for a fully developed project proposal, or
- Applicants could request demonstration funding with a commitment to solicit an eligible demonstration project once funds are secured from ARB.

The project solicitations would provide details regarding minimum application requirements for each demonstration project category.

Where would I apply for demonstration project funds?

Local air districts or other public agencies would apply directly to ARB for funding once the demonstration project solicitation opens. Those wishing to demonstrate a technology could submit a project proposal to ARB in conjunction with an air district or other eligible agency.

How much funding can I receive for a demonstration project?

The maximum available demonstration project funding levels for the five eligible vehicle and equipment types are identified in Chapter IV.

Can emission data gathering be included in the project funding proposal?

Yes. In order to meet requirements of the AB 118 Air Quality Guidelines (commonly referred to as the AB 118 “anti-backsliding” guidelines), AQIP demonstration projects must have an air quality data or evaluation component.⁹ Costs to validate the emission reducing potential of a specific project would be eligible for demonstration project funding. Costs to get a technology verified or certified by ARB would not be eligible for funding.

Would there be a match requirement for the demonstration projects?

Yes, staff recommends that at least 50 percent of each demonstration project’s funds be provided by a non-AQIP source, such as an interested industry partner or local air district. Ten percent of this non-AQIP match would have to come from the owner of the demonstration vehicle or equipment technology.

⁹ ARB, AB 118 Air Quality Guidelines for the Air Quality Improvement Program and the Alternative and Renewable Fuel and Vehicle Technology Program (Section 2341), Approved September 25, 2008, www.arb.ca.gov/regact/2008/aqipfuels08/aqipfuels08.htm

Could in-kind contributions be used to meet the matching demonstration project requirement?

Yes, in-kind contributions can be used as part of a demonstration projects match requirement. As an example, if a school district has partnered with a company demonstrating a zero-emission school bus, the cost to the school district to provide a school bus driver would be an eligible in-kind contribution.

Can AQIP funds be combined with federal economic stimulus money or other federal or local funds?

Yes, other non-AQIP funds can be combined to make a project more viable and cost-effective. The use of AQIP funds to satisfy match requirements for the American Recovery and Investment Act of 2009 funds would be considered if it enables more funding to be directed to California clean air projects.

When would solicitations be issued for each of the demonstration project categories?

Solicitation dates for demonstration projects would be issued on a staggered schedule once AQIP funds are approved in the FY 2010-11 State budget. The tentative FY 2009-10 AQIP project schedule is presented in Appendix F.

How will demonstration project applications be evaluated and scored?

Proposals for potential projects will be evaluated based on a demonstration project scoring criteria presented in Table E-1. Detailed descriptions and requirements for potential projects will be included in the project solicitations.

Table E-1: Scoring Criteria for Demonstration Projects

| Scoring Criteria | Points |
|--|---------------|
| Potential Emission Reductions | 25 |
| Match Funding | 20 |
| Project Implementation Plan/Timeline | 15 |
| Potential for Market Penetration of the Technology | 10 |
| Application Completeness | 10 |
| Environmental Justice | 5 |
| Ability to Promote the Use of Alternative Fuels and Vehicle Technologies | 5 |
| Industry Collaboration | 5 |
| California-Based Business | 5 |
| TOTAL | 100 |

The Proposed Air Quality Improvement Program Guidelines – also to be considered by the Board at the April 23-24, 2009 Board hearing – include additional information regarding project solicitations and project application evaluation and scoring requirements.

Appendix F: Projected FY 2009-10 AQIP Project Schedule

Projected FY 2009-10 AQIP Project Schedule

| Project | Project Solicitation | Grantee Selection | Funding Available |
|--|-----------------------------|--------------------------|--------------------------|
| Hybrid Truck and Bus Vouchers | July 2009 | Aug-Sept 2009 | Oct 2009 |
| ZEV and Other Clean Vehicle Rebates | Aug 2009 | Sept-Oct 2009 | Nov 2009 |
| Locomotive Demonstration Project #1 | Aug 2009 | Sept-Oct 2009 | Nov 2009 |
| Lawn and Garden Equipment Replacement | Sept 2009 | Oct-Nov 2009 | Dec 2009 |
| Marine Vessel Demonstration Project | Oct 2009 | Nov-Dec 2009 | Jan 2010 |
| Zero-Emission All-Terrain Ag Work Vehicle Rebates | Nov 2009 | Dec-Jan 2009 | Feb 2010 |
| Agricultural Equipment, Off-Road Equipment, Transit/School Bus Demonstration Projects, and Locomotive Demonstration Project #2 | Nov 2009 - Jan 2010 | Dec 2009 – March 2010 | Jan – April 2010 |

This schedule assumes the FY 2009-10 Budget is signed on July 1, 2009; a budget delay would result in a commensurate delay in project solicitations.