Task Order Zero Emission Vehicle Planning and Infrastructure Support

Task Order # P59822-1702705.00

This Task Order is pursuant to the Master Services Agreement ("MSA") between Sage Renewable Energy Consulting, Inc. dba NV5 ("NV5"), and Mountain View Whisman School District ("CLIENT" or "District") dated October 31, 2017.

This Task Order must be mutually executed before work commences.

Project Name	Zero Emission Vehicle Planning and Infrastructure Support
Client	Mountain View Whisman School District
Physical Location	Mountain View, CA
Estimated Start Date	September 2023
Estimated End Date	April 2025
Estimated Fees	**Fixed Fee per Task:** Task 1 Fleet Electrification Transition Plan: $50,100 Task 2 Design and Procurement: $109,000 **Time & Material (T&M) per Task** Task 3 Incentive and Grant Application and Management: $20,000 Task 4 Project Implementation: $98,900

Project Contacts

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Project Overview

This task order outlines planning, incentive management, design, and implementation services to support CLIENT's electric vehicle (EV) transition. CLIENT is seeking to transition most of its bus fleet to battery electric buses (BEBs), as well as maintenance vehicle fleet, with both grant and internal funding. CLIENT's fleet includes approximately 11 school buses and up to 19 other fleet vehicles ("white fleet").

The following is an outline of the tasks NV5 will perform to support the CLIENT with EV transition. A detailed Scope of Work follows detailing our efforts under each of these tasks:

1) Fleet Electrification Transition Plan (Fixed Fee)

   - Characterize existing bus and white fleet, routes, and usage.
   - Review regulatory requirements for EV transition.
   - Identify potential EV replacement vehicles and identify market gaps.
   - Establish a transition plan to implement EVs/EVSE, considering funding, regulations, market availability, CLIENT goals, etc.
   - Estimate capital plan, including Total Cost of Ownership (TCO) calculations.
   - Identify & help CLIENT select suitable EVSE and Charge Management Software (CMS).

2) Design & Procurement (Fixed Fee)

   - Develop designs for the EVSE infrastructure. Task assumes 50% and 90% level designs, sufficient to procure a contractor to permit and install.
   - Provide procurement documents and help manage competitive procurement.
   - Assist with vendor selection and contract negotiations.

3) Grant & Incentive Assistance (T&M)

   - Assist with identifying grant funding for EVs & EVSE.
   - Manage PG&E EV Fleet program participation for CLIENT.
   - Work with CLIENT to pursue and manage grants and incentives.

4) Implementation Support (T&M)

   - Provide technical construction support during EVSE implementation.
   - Oversee vendor commissioning and closeout for EVSE.

Scope of Work

Task 1 Fleet Electrification Transition Plan

This task includes the analysis and development of a fleet transition plan with recommended replacement vehicles, charging requirements, and estimated capital and operating costs over time. As a part of this task, we will also review and assist CLIENT with selecting EVSE infrastructure.

The task begins with a review of goals and objectives, collection of fleet and site data, review of existing conditions, and a review of any existing incentives or work-to-date.

Working with CLIENT, we will develop a replacement vehicle schedule, EVSE requirements, and operational recommendations. High-level cost estimates, capital plan, and phasing recommendations will be provided. We will also develop an EVSE concept, incorporating CLIENT preferences, software recommendations, vehicle charging requirements, incentive/grant constraints, and any phasing.

1.1 Conduct a kickoff meeting to define goals and objectives, identify key assumptions, define constraints, and outline the data and input required from CLIENT.
1.2 Review regulatory drivers and environmental credit opportunities.
1.3 Collect fleet and site data sufficient to characterize the fleet, current fleet capital and operating costs, and vehicle operations. Identify any plans for growth, replacement thresholds, changes to fleet, and constraints. This task assumes CLIENT will provide fleet summary data; NV5 will not collect and analyze telematics data.
1.4 Review the market for suitable replacement EVs for the CLIENT's fleet with a focus on CLIENT's preferred providers and vehicles already procured. Assist with preliminary vehicle selection.
1.5 Review information provided by CLIENT on existing electrical infrastructure and identify potential siting for new infrastructure at two (2) client sites. Solicit CLIENT input/preferences. Task assumes that a new service will be provided by PG&E for EVSE.
1.6 In collaboration with CLIENT, define up to two potential 10-year fleet transition schedules.
1.7 Identify the number, type and preliminary siting of EVSE to support full fleet electrification.
1.8 Develop charging profiles for buses and white fleet for one fleet transition schedule. Perform tariff modeling to approximate charging costs and optimize charger selection. Includes modeling of one fleet transition schedule for up to two iterations.
1.9 EVSE 10% Design Concept
- Collaborate with CLIENT to refine EVSE and CMS requirements and specifications.
- Identify up to three CMS providers that meet CLIENT requirements. CLIENT to select preferred CMS provider prior to selecting EVSEs.
- Identify up to three EVSE makes/models that meet CLIENT requirements aligned with CMS provider and grant/incentive/rebate approved product list(s).
- Gather and summarize market pricing for EVSE inclusive of warranties, software, and O&M costs.
- Develop EVSE concept for two (2) client sites based on selected EVSE, including schematic site plan.

1.10 Develop Total Cost of Ownership (TCO) estimate and cashflow modeling to estimate capital and operating costs for the CLIENT over time. Cashflow to compare Internal Combustion Engine (ICE) operating costs with EVs. Includes modeling of one fleet transition schedule for up to two iterations. The following estimated costs will be included:
- Vehicles – Purchase or lease costs for EVs.
- Infrastructure - Capital and operating costs for EVSE.
- Fuel Cost - Detailed electricity cost modeling compared against existing ICE.
- Maintenance - Estimated cost to maintain the battery electric fleet.
- Incentives - Incorporate available incentives into cost model, including LCFS/RECs.

1.11 Prepare strategic plan summarizing analysis, including EVSE concept and capital plan/cashflow.

Site Visits: One visit to two facilities.

Task 2 Design and Procurement Support

This task includes detailed design of charging infrastructure at two (2) CLIENT sites and procurement of an installation contractor. Work under this task assumes the design will need to coordinate with the requirements of the PG&E EV Fleet program. With support from NV5, CLIENT is responsible for submitting the application to PG&E or delegating responsibility to NV5 to handle on their behalf. Design beyond preliminary schematics cannot commence until eligibility is determined.

Progress Designs

NV5 will develop progress design (50% & 90%) sets for EVSE and related infrastructure at two (2) CLIENT sites and coordinate with PG&E EV Fleet process & requirements.

2.1 CLIENT meeting to review initial concept and to gather further stakeholder input. Identify any upcoming projects or changes to the facility that may impact EVSE infrastructure.

2.2 50% Design Development
- Perform electrical site visit.
- Review existing infrastructure and any available as builds. Identify new EVSE service requirements and preliminary siting.
- Engage with PG&E to review conceptual design and confirm power supply/metering strategy. Utility incentive application/management provided under Task 3.
- Create Design Development Plans. Include reserved footprint for future electrical service, EVSE equipment (including phasing), and identify existing and/or new EV service. Work does not include ADA or parking lot reconfiguration.

2.3 90% Construction Documents
- Collect/collate review comments and meet with CLIENT.
- Develop Construction Documents (CD) design set (90% design) and drawing-based specifications for CLIENT review based off SD comments/revisions.
- Ongoing coordination with Utility Infrastructure program to coordinate designs.

- Finalize CD set sufficient for Design-Bid-Build procurement. Assumes permitting to be completed by selected Contractor.

2.4 Revise and update TCO estimates based on EVSE design and incentives/grants.

Site Visits: One for site inspection and Due Diligence Surveys if elected.

Assumptions:

1. New EVSE service to be designed by the Utility.
2. No major parking lot reconfiguration.
3. Standard design for equipment pads covered under Civil. (Additional structural AHJ requirements not covered).

Optional Services (not included in base scope/budget):

1. Topographic survey, Underground utility locating, boundary survey.
2. Grading design (e.g. upgrade existing pavement surface for accessibility standards).
3. Geotechnical investigations/engineering.
4. Movement study and/or parking lot reconfiguration/design.
5. Path of Travel (POT) improvements.
6. Earthwork and formal landscaping.
7. Retaining walls or extensive flatwork.
8. Public improvement packages.
9. Substantial rework of drawings resulting from AHJ/City/utility comments (>6-hours per site).

Procurement

Assist CLIENT in procuring EVSE equipment and infrastructure construction on CLIENT side of new EVSE Utility services.

2.5 Create Request for Proposals (RFP) based on NV5 RFP templates. Procurement may be conducted under standard CA public contracting code or utilizing contracting code that allows CLIENT to select “best value” proposal. Assumes that CLIENT will provide Design-Build or Design-Bid-Build Contract Templates.
2.6 Review with CLIENT and Legal Counsel. Produce final RFP document set based on stakeholder comments.
2.7 Manage solicitation notices and electronic distribution in coordination with CLIENT.
2.8 Coordinate and conduct site walk with interested contractors.
2.9 Manage document access and produce Addenda with RFI responses, as needed. Manage electronic submission of proposals.
2.10 Perform analysis of top three proposals, including review of pricing, lifecycle cost, Contractor qualifications, schedule, reference checks, operating agreements, exceptions, etc.
2.11 Assist with Contractor selection, including optional interview of highest-ranked Contractor.
2.12 Assist with notifications to proposers.
2.13 Assist with contract negotiations, attending meetings, supporting contract negotiations/ redlines, and providing coordination with CLIENT, Legal Counsel, and Contractor.

2.14 Work with Legal Counsel to prepare findings and resolution for Board as-needed.

Site Visits: One for RFP walk or CLIENT meeting as needed.

Task 3 Incentive and Grant Application and Management

Provide Incentive and Grant support as needed including identifying, applying for and managing grants, incentive or Utility programs on behalf of the District. This Task includes budget for up to 100-hours of NV5 staff time on a time-and-materials basis.

3.1 Assist CLIENT with identifying and managing grants, incentives, and rebates for EVs and EV Infrastructure. Potential incentives may include:
- Carl Moyer funding
- PG&E EV Fleet program
- Other Utility programs - Peninsula Clean Energy (PCE) or PG&E
- California Energy Commission (CEC)
- Environmental Protection Agency (EPA) Clean School Bus Program
- California Air Resources Board (CARB)
- California HVIP (Hybrid Voucher Incentive Program)
- Other Local Air Board, State or Federal programs

3.2 Review grant timeframes, constraints, stackability, opportunity to leverage vendor support, and level of effort with CLIENT.
3.3 Assist in determining which grants to pursue.
3.4 Assist CLIENT with applications and application management.
3.5 Manage incentive and grant programs, including coordination with grant manager, data collection, equipment screening, fund stacking, reimbursement requests, and grant reporting.

Site Visits: None, all work remote.

Task 4 Owner's Rep for Construction/Commissioning

This task includes support to CLIENT and CLIENT Construction Manager (CM) for construction and commissioning oversight to ensure that project meets design requirements and any grant or incentive funding requirements.

EVSE Construction Support

Oversee Contractor during permitting (permitting by Contractor). Assist CLIENT and CM in weekly construction meetings, review RFIs and change orders, and perform site periodic site inspections to ensure construction meets design.

4.1 Oversee design finalization and permitting by Contractor.
4.2 Oversee/Coordination between Contractor and Utility EVSE Program, including with Utility's Contractor for new service drop(s) and infrastructure installation.
4.3 Provide oversite on New Service Application initiated under Utility EVSE Program.
4.4 Coordinate and participation in construction kickoff meeting site visit.

4.5 Participation remotely in regular project meetings.
4.6 Track Contractor-maintained master schedule and look-aheads against milestones.
4.7 Review and respond to RFIs.
4.8 Review pay-app requests.
4.9 Technical review and comments on design changes and change orders.
4.10 Perform site inspections and attend AHJ inspections as-feasible, provide written summaries.
4.11 As needed support and communications with CLIENT, CM and AHJ inspector.

Site visits: Up to three, for Construction kickoff and progress inspection.

Commissioning (Cx) Verification and Project Closeout

NV5 will review construction and EV charger installation to ensure that charging equipment is operational, EV chargers are networked, and CLIENT is trained on use of EV Chargers and CMS.

4.12 Review Contractor's Cx methodology and ensure EVSE installed and commissioned per design/contract/EVSE vendor requirements.
4.13 Provide technical and operating assistance for chargers and CMS setup as needed, including coordination with CMS provider.
4.14 Inspection of infrastructure, including:
- System component and design conformance verification
- Workmanship evaluation
- Performance verification

4.15 Coordinate project closeout punch walk, manage punch list progress, and verify completion in coordination with CM and CLIENT Staff.
4.16 Produce library of closeout documentation, including as-builts plans, inspections reports, punch list closeout, etc.
4.17 Verify AHJ/Utility closeout.

Site visits: Up to two, for inspection and verification.

Schedule and Deliverables

Task		Start Date	End Date	Deliverables
1	**Fleet Electrification Transition Plan**	September 2023	January 2024	– Strategic Plan – TCO Estimate – Conceptual Design
2	**Design and Procurement Support**			
	Design	February 2024	May 2024	– 50% EVSE Design Documents – 90% EVSE Construction Documents
	Procurement	June 2024	September 2024	– RFP Documents, Draft & Final – Distribution & Addenda

Task	Start Date	End Date	Deliverables
			– Proposal Evaluation Summary – Redlines of Contract Documents – Input for Board Resolution/Presentation
3 Incentive and Grant Application/Mgt	September 2023	April 2025	– Correspondence and review of Utility EVSE Program – Grant/Incentive application(s) – Response to application
4 Implementation Support			
EVSE Construction Support	October 2024	December 2024	– Review & Comments for Submittals/RFIs/Change Orders/Pay Apps
Commissioning Verification and Project Closeout	January 2025	April 2025	– Punch List – Project Summary Report, includes inspection reports, as-built plans set, all contract documents and amendments & electronic document closeout library

Project Requirements and Assumptions

1. Travel to the proposed project site and/or the CLIENT site as stated in Tasks. Project travel assumes one NV5 representative per site visit unless otherwise noted. Travel requested by CLIENT in excess of visits listed to be billed T&M and may be billed to project contingency if included.
2. Assumes schedule listed above. Delays or extension of the assumed schedule by others (Utility, Contractor, CLIENT, etc.) or circumstances beyond NV5's control may require additional budget.
3. All deliverables will be provided in electronic format.
4. Fleet data will be made available as needed including existing vehicle make, model, year, GVWR, usage patterns and routes, and current odometer reading.
5. Site data will be made available as needed including current service location, service size, existing transformers, and other electrical infrastructure on site. NV5 will review available existing data and provide preliminary review of project constraints. On-site review will be limited to visual inspections of potential component locations, electrical services and existing site conditions. Feasibility will not include new or invasive site investigations (e.g., geotechnical studies, structural investigation, shutdown/inspection of electrical services, etc.) unless specifically contracted with NV5.
6. Assumes NV5 will coordinate fleet data collection with one CLIENT point of contact.

7. CLIENT will provide necessary staff support for site visits, access to electrical gear, timely responsiveness to questions, reviews, and data requests.
8. Assumes new EVSE Utility service to be designed and installed by PG&E under EV Fleet program. NV5 scope will cover Behind-the-Meter (BTM) design only.
9. Construction and commissioning of project will be performed by others. NV5 will provide technical assistance during construction, review/oversight of Contractor commissioning, inspections/performance assessment as noted.
10. Contractor is responsible for permitting and may be responsible for necessary Utility agreements. NV5 will provide technical review and oversight of Contractor's permitting and Utility agreement effort and provide ongoing coordination for Utility EVSE program.
11. NV5 will be on-site during construction and commissioning as noted and perform the tasks listed, including providing technical support and contract adherence verification. CLIENT will self-perform or separately contract day-to-day construction management and be available for required AHJ inspections.

Exclusions

The following design and permitting work are excluded unless specifically contracted with NV5:

1. Permitting Fees. Can be processed by NV5 but will be submitted for reimbursement on a site-by-site basis.
2. Utility-side design and infrastructure improvements are assumed to be handled by the Utility as part of the PG&E EV Fleet Program.
3. DSA Permit Coordination.
4. ADA upgrades.
5. Stamped drawings.
6. Accessibility review or design (not typically required for fleet applications).
7. Topographic and boundary surveying.
8. Mobility studies or parking lot reconfiguration.
9. Title search/legal boundaries.
10. Offsite easements.
11. Traffic studies.
12. Environmental impact reports or studies.
13. Soils/Geological Hazard and Pavement Reports.

Fees and Payment Schedule

The Task fees listed in this section are based on anticipated workload for the scope set forth in this Task Order. For T&M tasks performed under this Task Order, NV5 has set a T&M Not to Exceed (NTE) maximum cost for the Task as shown in the table below. For remaining tasks, NV5 is proposing services on a fixed fee per task basis.

Task		Fixed Fee	T&M	Total
1.	Fleet Electrification Strategic Planning	$50,100	-	$50,100
2.	Design (50%, 90%) and Procurement Support	$109,000	-	$109,000
3.	Incentive and Grant Application and Management	-	$20,000	$20,000
4.	Project Implementation	-	$98,900	$98,900
	Total	$159,100	$118,900	$278,000

Optional Task		Fixed Fee
	Topographic Survey	$29,000

Hourly Fee Schedule

T&M work is billed at the hourly rates listed below for project work completed through December 31, 2023. Updated hourly fees will be provided by NV5 as necessary prior to each new calendar year. NV5 will not exceed project NTE limits without consent of CLIENT.

Title	2023	2024
Subject Matter Expert	$415	$430
Principal	$310	$325
Associate Principal	$275	$290
Project Manager III	$260	$270
Project Manager II	$225	$235
Project Manager I	$205	$215
Project Manager Assistant	$150	$160
Design Engineer (PE) II	$270	$280
Design Engineer (PE) I	$235	$245
Construction Manager II	$260	$265
Construction Manager I	$210	$220
Engineer/Data Scientist III	$235	$250
Engineer/Data Scientist II	$195	$205
Engineer/Data Scientist I	$175	$185
Analyst/Technician	$160	$165
Project Coordinator	$120	$135

Project Administrator	$95	$100
Intern	$120	$125

Billing and Payment Terms

NV5 invoices monthly with terms of Net 30. If schedule is extended as a result of CLIENT, regulatory, or Developer or other contractor/vendor actions or inactions, NV5 will consult with CLIENT on utilizing contingency funds or extending the budget as needed.

Reimbursable Expenses

Fees assume all deliverable materials for the project will be provided digitally. Printed copies of documents will be billed at cost plus 10%. For time and materials fee structure projects, all reasonable and ordinary expenses are reimbursable at cost plus 10%.

Travel Costs

When air travel is required, coach class airfare will be used for domestic air travel and business class airfare will be used for international travel. Personnel travel time from our office to project location is billable at the full hourly rate. Meals and lodging will be billed at cost. Vehicle driving mileage will be billed at the current IRS mileage rate.

IN WITNESS WHEREOF, authorized representatives of both NV5 and CLIENT have executed this agreement as of the date set forth above.

NV5	Mountain View Whisman School District
Name: Tom Williard	Name:
Title: Vice President	Title:
Date: August 7, 2023	Date: