

## Applicant Information

### Instructions

- 1) Review the eligibility information, evaluation criteria, and award recipient requirements before completing the grant application.
- 2) Complete this **EVOlve Grant Application**. Compile and submit all necessary supporting documentation.
- 3) Populate the **Preliminary Financial Summary** that can be downloaded from: <https://www.santeecooper.com/Save-Energy-Money/Electric-Vehicles/Commercial/Index.aspx>.
- 4) E-mail the complete application package to [e-mobility@santeecooper.com](mailto:e-mobility@santeecooper.com) with “**EVOlve Grant**” in the subject line.

The application package should include:

- a) **Preliminary Financial Summary** (Excel/xls)
  - b) **EVOlve Grant Application** (PDF)
  - c) Supporting documentation (specified in the **Application Checklist**). Compile attachments into a single PDF or attach as separate files.
- 5) Submit applications by the **May 1, 2023** due date.

## EVOlve Grant Information

Santee Cooper is pleased to make transportation electrification funding available to eligible commercial customers (as defined in the **Requirements and Eligibility** section below). Funding is available for projects in four categories and awards will cover a maximum of 25 to 100 percent of eligible costs to complete a qualifying project.

### Funding Allotments and Maximums

The maximum funding allotted per project is **\$25,000**. This amount is subject to limitations and caps by category, as shown in the table below.

Funding is available for projects in four categories and awards will cover a maximum of 25 to 100 percent of eligible costs to complete a qualifying project.

**Table 1** breaks down the maximum funding percentage by project category:

**Table 1. Maximum Funding by Project Category**

Project Type	Maximum Santee Cooper Funding
Education / Outreach	100%
Electric Fleet Conversion	25%
Electric Vehicle (EV) Charging Infrastructure	50%
Make-Ready Research / Needs Assessment	100%

## Requirements and Eligibility

Santee Cooper commercial customers on a GA, GB, GL, or GT rate are eligible to apply for the grant program. To be considered, applicants must:

- Submit a completed **EVOlve Grant Application** along with supplementary documentation (detailed in the **Instructions** and **Application Checklist**) by the posted deadline.
- Participate in program evaluation activities (e.g., surveys/questionnaires).

### Eligible Expenses:

- New electric vehicle purchase (light-, medium-, or heavy-duty vehicles)
- Capital expenses directly associated with the installation of electric vehicle charging infrastructure (e.g., hardware and installation costs, make-ready costs, and upfront software license costs)
- Costs related to approved Education / Outreach
- Expenses related to Make-Ready Research / Needs Assessment

### Ineligible Expenses:

The following costs are NOT eligible for reimbursement:

- Structural improvements or site preparation that would be considered general facilities maintenance (e.g., re-paving, upgrading an overloaded electrical panel, landscaping, etc.) not associated with EV charging infrastructure installation
- Construction bond costs, interest, and warranty charges
- Ongoing system or facility maintenance or repair costs
- Donated, in-kind or volunteer labor or materials
- Costs incurred prior to award (e.g., engineering designs, site evaluations, estimates/bids)
- Low Speed Electric Vehicles (Golf Carts, ATVs, etc.)

## Project Examples

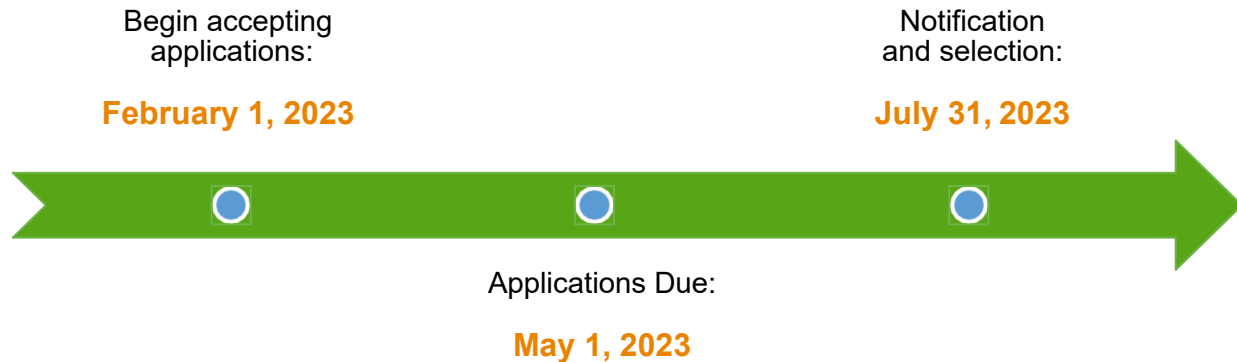
To adapt to a rapidly evolving market, there is flexibility in the types of projects considered for grant funding. **Table 2** shows potential project types. These project examples are illustrative and do not rule out alternative project proposals from consideration. You can apply for one or a combination of any of the project categories and types. Projects are not limited to the examples shown, but funding award cannot exceed \$25,000.

**Table 2. Project Examples**

Project Type	Project Example
<b>Education / Outreach</b>	An applicant requests funding to create a special EV event (e.g., a university proposes a showcase for students, faculty, and community members).
	An applicant requests funding to create a public outreach program to educate local communities or groups about the environmental benefits of EVs.
<b>Electric Fleet Conversion</b>	An applicant requests funding to convert light-, medium-, or heavy-duty vehicle(s) from internal combustion engines (ICE) to electric vehicles (EV). This can be a single vehicle or part of a larger plan to electrify their fleet.
<b>Electric Vehicle Charging Infrastructure</b>	An applicant (e.g., multifamily property or business owner) requests funding to install EV charging infrastructure and provide charging as an amenity for use (e.g., public, workplace, etc.).
<b>Make-Ready Research / Needs Assessment</b>	An applicant requests funding for an assessment or study with the goal of expanding EV/electrification options and infrastructure (e.g., in a city, county, region, community, etc.).

Figure 1 shows the timeline for the current funding cycle.

**Figure 1. EVOlve Grant Timeline**



### Grant Recipient Responsibilities

Grant recipients will serve as project lead and be responsible for project design, project management, equipment purchase and installation, awareness building, as well as the ongoing costs of operating and maintaining any charging equipment.

- Preference may be given to projects with the ability to collect and transfer data to Santee Cooper.
- Preference will be given to projects that:
  - 1) Demonstrate how the EVOlve Grant is essential to funding the project, and
  - 2) Show secured, matching financial commitments to complete the project.

Grant recipients will have one calendar year to complete projects from the date of award. Project extensions are not guaranteed but may be requested and approved at Santee Cooper's sole discretion.

Projects will be reimbursed up to the award amount for documented eligible expenses. Eligible expenses are limited by the **Funding Allotments and Maximums** and **Maximum Funding by Project Category** sections.

## Application Evaluation

Santee Cooper uses an independent, third-party grant manager to review and score projects based on the criteria outlined in **Table 3** below.

**Table 3. EVOlve Grant Criteria**

Criteria	Measures
<b>Project Feasibility / Utilization</b>	<ul style="list-style-type: none"> <li>• Viability of the project plan and timeline</li> <li>• Readiness of the project team</li> <li>• Identified potential project barriers and demonstrated strategic response</li> <li>• Frequent and consistent utilization of the project</li> </ul>
<b>Use of Funds</b>	<ul style="list-style-type: none"> <li>• Viability of the proposed budget</li> <li>• Applicant obtained or made a financial commitment to match funds and/or leverages funds from other reliable sources</li> <li>• Preference will be given to projects that:               <ol style="list-style-type: none"> <li>1) Demonstrate how the EVOlve Grant is essential to funding the project,</li> <li>2) Show secured, matching financial commitments to support the project</li> </ol> </li> </ul>
<b>Innovation</b>	<ul style="list-style-type: none"> <li>• Creative project design and utilization of resources</li> <li>• Use of collaborative partnerships</li> <li>• Plan to collect, analyze, and report data to Santee Cooper</li> <li>• Preference may be given to projects with the ability to collect/transfer data to Santee Cooper</li> </ul>
<b>Equity</b>	<ul style="list-style-type: none"> <li>• Detailed plan to directly address barriers to mobility for communities currently underserved by electric transportation (ex. rural communities, low-income communities, low/medium-priced multi-family units, etc.)</li> <li>• Easy accessibility of the project to the surrounding communities</li> </ul>
<b>Additional Benefits</b>	<ul style="list-style-type: none"> <li>• Commitment to community visibility/outreach about the project</li> <li>• Education plan and awareness building opportunities</li> <li>• Plans to expand upon the proposed project in the future</li> <li>• Alignment with the applicant’s broader environmental mission or goals</li> </ul>

## EVOlve Grant Application

Interested applicants should complete and submit the grant application form below.

<b>Applicant Information</b>	
<b>Name of Organization</b>	
<b>Santee Cooper customer account number</b> (If applicant is not the property owner, please complete the Landlord Consent Form and submit with application packet)	
<b>Organization website address</b>	
<b>Primary Project Contact Information</b>	
This contact will be the primary point of contact responsible for project updates, reports, and coordination. Please notify <a href="mailto:e-mobility@santeecooper.com">e-mobility@santeecooper.com</a> within 15 days if the primary contact changes.	
<b>Name</b>	
<b>Title</b>	
<b>Organization name</b>	
<b>Role in the project</b>	
<b>Phone number</b>	
<b>Email address</b>	
<b>Additional Applicant Details:</b>	
<b>Type of applicant</b> (Local Non-profit, Higher Education, etc.)	
<b>Name of individual completing application</b> (Include affiliation and contact information if different from primary contact or contractor/installer)	

<b>Applicant Information</b>	
<p><b>How did you hear about Santee Cooper’s EVOlve Grant program?</b></p> <p>(Select all that apply)</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Bill insert</li> <li><input type="checkbox"/> Online ad</li> <li><input type="checkbox"/> Word-of-mouth</li> <li><input type="checkbox"/> Santee Cooper website</li> <li><input type="checkbox"/> Santee Cooper employee</li> <li><input type="checkbox"/> News article</li> <li><input type="checkbox"/> Other (please specify)</li> </ul>
<p><b>Please verify that the project satisfies the <i>Requirements and Eligibility</i> provided above</b></p>	<p>I certify that this project meets Santee Cooper's EVOlve Grant funding award eligibility requirements listed under <b>Requirements and Eligibility</b>.</p> <p><input type="checkbox"/></p>



### Project Information

#### Physical address where project will be implemented.

- Include facility name, street address, city, state, zip code, and/or GPS coordinates.
- If the project does not have a specific address, please explain the route, stops, or localized areas that the project will be serving.

**Project Category**  
(Select all that apply)

- Education/Outreach
- Electric Fleet Conversion
- Electric Vehicle Charging Infrastructure
- Make-Ready Research/Needs Assessment
- Other. Please explain:

#### What is the purpose of the project? What needs do the project address?

## Project Feasibility

### Provide a project scope.

- Describe your plan and how it will be implemented.
- How will your project achieve the proposed outcomes?

### Describe the overall structure of the project team and the primary roles of each team member.

Specify who is responsible for key elements of the project (e.g., project planning and management, status updates, reports, etc.)

## Project Feasibility

### Project Timeline

- Describe the current status of the project and the plan for bringing the project to completion in one year.
- Identify potential challenges and risks and the strategy for mitigating each of those risks (including financial risks) to completing the project (e.g., If the selected equipment/vehicle is unavailable or if matching/reserve funds fall through, what is the back-up plan?)

### Provide a rough estimate for the project's expected utilization.

- How many people is the project estimated to serve?
- Estimated short- and long-term usage or impact, direct and indirect impacts, etc.?
- Is the project easily accessible by residents/members of the surrounding community?

## Use of Funds, Project Costs, and Financing

**Describe the financial structure of the project. Include:**

- Who will pay for and own the project?
- Who will receive the financial benefits?
- Who will pay for maintenance and repairs (if equipment is involved)?

**Describe efforts to ensure that the proposed budget represents the maximum value for the cost of the project and any efforts taken to explore additional sources of funding.**

- What resources did you use to create your budget and plan your project?
- Did you consult with multiple vendors or contractors?
- Are you planning to put the project to bid?

**Please explain why the EVOlve grant funding is critical to execute this project successfully.**

- Would this project be possible without grant funding?
- Why does your organization need this grant?

## Education, Environment, Equity, and Community

### Describe the host organization.

(Including its mission, history, purpose, and who it serves)

### Does your project benefit underserved communities?

Include any plans to directly engage and/or address barriers (such as accessibility) to benefit communities currently underserved by electric transportation (e.g., rural communities, low-income communities, low-medium priced multi-family units, etc.)

### What are the economic and environmental benefits of the project? For example,

- How will the cost saving benefits from the project be used?
- Will the project help meet any environmental goals?
- Are there any additional benefits to the local community?

## Education, Environment, Equity, and Community

**How will the proposed project educate and raise awareness about electric mobility in the community?**

Describe any education and outreach plans you will undertake to encourage community usage and awareness.

## Optional Questions:

The questions in the following section are optional but may strengthen your application.

### Innovation

**Describe any creative project design and utilization of resources. For example,**

- How are you leveraging your organization's strengths?
- Is your project unique?

**Describe any partnerships formed to deliver the project.**

Please list the names of any partner organizations and elaborate on their roles and added value within the project.

**Describe the type(s) of data that will be available through the project.**

(e.g., interval energy consumption, average session duration, station usage by time of day, number of unique drivers, number of webinars, number of demonstrations, etc.)

## Innovation

### How have you engaged members of your community in planning this project?

- What stakeholder engagement do you plan to do, or have you done?
- Have you received any input from residents, customers, city, staff, etc. regarding the need or plans for this project?



## Certification

I certify that I have reviewed the application and the award recipient requirements in preparation for applying for this grant.

I understand and certify that should this project be awarded funding, my organization will be able to meet the award recipient requirements as described at [www.santeecooper.com/EVOlveGrant](http://www.santeecooper.com/EVOlveGrant).

I attest that the information provided in this application is both accurate and current.

I also understand that submitting an application in no way obligates Santee Cooper to provide funding to this project and that funds are distributed at the sole discretion of Santee Cooper.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Printed name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Contact number: \_\_\_\_\_

If this request is being submitted by multiple parties or a party other than the project owner, please indicate below by providing the party's name, title and contact information.

The project owner must approve the submittal on their behalf through a signature, demonstrating that all the parties linked to the project have reviewed the application and support the project, along with supporting documentation (please see the **Application Checklist** below for a comprehensive list of required attachments).

Approving party (project host/owner) – if other than project applicant

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Printed name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Contact number: \_\_\_\_\_

## Application Checklist

Applications are due before or by **May 1, 2023**. Complete applications should be sent to [e-mobility@santecooper.com](mailto:e-mobility@santecooper.com) and submitted in accordance with the **Instructions**.

Please review the application checklists below to ensure you have submitted all required documents. If any required documents are not included, please identify the reason in the section provided to capture that information below.

## Required Documents for All Applications

All applicants must submit the following documents. If you cannot produce any of the following documents, please provide an explanation below.

- Preliminary Financial Summary.** Include a project total and itemized cost breakdown in the Excel template on the website <https://www.santecooper.com/Save-Energy-Money/Electric-Vehicles/Commercial/Index.aspx>. You should include any matching or contributing funds your organization is using to fund the project, estimated costs, etc. Please be as detailed as possible and fill out all tabs and cells related to your project category.
- Secured Funding Source Confirmation.** If the matching project funding will come from an external source (such as another grant), provide documentation (e.g., award letters, confirmation emails, or other communication) indicating the funding source, amount, and a confirmation that the funding has been secured.
- Project Development Timeline.** A Gantt chart or schedule that includes the duration of each project development stage and the corresponding dates of major milestones.
- Letter of Support.** A support letter from the project owner/grant recipient is required if the organization compiling the application is different organization than the organization receiving the grant.

## Required Documents for Applications with Physical Assets

For any project that includes the installation of infrastructure, procurement of EVs, or any other physical assets, the following documents are required.

- Equipment and/or Site Specifications.** Overview of physical assets (EV or EV charging infrastructure equipment) with description, features, and support information.

- Equipment specification sheet and warranty information.**

- Documentation of basic equipment/component details (e.g., manufacturer, make, model, reliability, safety, capabilities, power load, features, etc.).

- Technical Assessment or Site Evaluation (Optional Document)**

- This is only applicable to EV charging infrastructure projects. This documentation is strongly recommended but not required.

- Cost Estimate(s).** Proposals, vendor/contractor bids, and/or contracts to support budget estimates and offer evidence of project understanding/feasibility.

- Site Control Agreement.** Required only if project involves permanently installing infrastructure or making physical changes to a site. See instructions below:

**If applicant is the property owner:**

- Copy of Land Ownership Documentation

**If applicant is NOT the property owner at the location of the proposed project, you must submit each of the following:**

- Landlord Consent Form (this must be completed by the property owner)
- Copy of Long-term Lease Agreement

If you are unable to provide any of the required documents, please explain:

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## Optional Documents for All Applications

The following documents are optional but may strengthen your application.

- Letters of Support**
  - Other support letters from key community members or leaders, etc. may be provided to support the application.
- Team Credentials.** A list of project team members, roles, and qualifications, such as:
  - Resumes of the project manager and other key team members.
  - List of any similar projects completed.