

**STATE OF NEW YORK
PUBLIC SERVICE COMMISSION**

In the Matter of Electric Vehicle Supply)
Equipment and Infrastructure Proceeding)

Case 18-E-0138

**IMPLEMENTATION PLAN OF ORANGE AND ROCKLAND UTILITIES, INC. FOR A
LIGHT-DUTY ELECTRIC VEHICLE CHARGING INFRASTRUCTURE MAKE-
READY PROGRAM**

September 14, 2020
Pearl River, New York

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I. Introduction and Summary

On July 16, 2020, the New York State Public Service Commission (the “Commission”) issued the *Order Establishing Electric Vehicle Infrastructure Make-Ready Program and Other Programs* (“Make-Ready Order” or “Order”).¹ Orange and Rockland Utilities, Inc. (“O&R” or “Company”) submits this Implementation Plan in accordance with the Make-Ready Order. The Order authorizes a budget of \$23.7 million to facilitate the make-ready of 2,845 Level 2 (“L2”) and 71 Direct Current Fast Charger (“DCFC”) charging plugs in O&R’s service territory through 2025.²

The Company is committed to facilitating clean transportation in its service area as part of its Clean Energy Commitment³ and looks forward to expanding the availability of charging infrastructure to EV drivers within O&R’s service territory. The electrification of transportation is a key tenant of the State’s clean energy goals, including the Climate Leadership and Community Protection Act’s (“CLCPA”) target to reduce greenhouse gas emissions by 85 percent of 1990 levels by 2050.⁴ Making more charging infrastructure available to drivers supports this goal by reducing range anxiety and removing barriers to EV adoption.

This filing details O&R’s initial company-specific plans, processes and procedures to implement the Make-Ready Program within its service territory including plans, eligibility criteria, incentive levels, outreach and education and anticipated program costs. In addition, details of the Company’s implementation of a Fleet Assessment Service for light-, medium- and heavy-duty fleets is included.

This implementation plan is structured into discrete sections:

- Section II presents a program overview and general eligibility criteria.
- Section III addresses the implementation of O&R’s Make-Ready Program.
- Section IV describes the Company’s planned outreach and education activities.
- Section V reviews the fleet assessment service.
- Section VI provides implementation timelines.

¹ Case 18-E-0138, *Proceeding on Motion of the Commission Regarding Electric Vehicle Supply Equipment and Infrastructure* (EVSE&I Proceeding), Order Establishing Electric Vehicle Infrastructure Make-Ready Program and Other Programs (Make-Ready Order) (issued July 16, 2020).

² In addition, the Order authorized additional activities to spur the growth of electric vehicles including the development of a medium- and heavy-duty EV pilot and a managed charging and vehicle-to-grid (“V2G”) proposal which will be detailed in future filings.

³ O&R’s Clean Energy Commitment is available at <https://www.oru.com/en/our-energy-future/our-energy-vision/our-energy-future-commitment>

⁴ Chapter 106 of the Laws of 2019. CLCPA is available at <https://legislation.nysenate.gov/pdf/bills/2019/S6599>

- Section VII describes anticipated program costs, third-party support and administrative needs.

While this implementation plan provides details regarding O&R’s Make-Ready Program, additional detail for program participants and interested parties is available through the Company’s outreach and education efforts as well as through updated information on the Company’s Make-Ready Program website⁵ during the course of program implementation.

II. Make-Ready Program Overview and Eligibility Criteria

The objective of the Make-Ready Program is to “support the development of electric infrastructure and equipment necessary to accommodate an increased deployment of EVs within New York State by reducing the upfront costs of building charging stations for light-duty EVs.” This program will offset certain infrastructure costs associated with preparing a site for EV charger installation for light-duty EVs in O&R’s service territory by providing an incentive to qualifying projects.

A. Definitions

The following definitions are applicable to the Make-Ready Program:

- Approved Contractor – A contractor who has met the Joint Utilities’⁶ approval criteria, described further in Section II. E.
- Disadvantaged Community - Under the CLCPA, Disadvantaged Communities are communities that bear the burdens of negative public health effects, environmental pollution, impacts of climate change, and possess certain socioeconomic criteria, or comprise high concentrations of low- and moderate-income households.

In the short term, O&R will use the definition for Disadvantaged Communities as defined by the Order. The Joint Utilities will publish an updated definition and corresponding maps after a statewide definition is developed, in early October 2020.

⁵ <https://www.oru.com/en/our-energy-future/technology-innovation/about-electric-vehicles/electric-vehicle-make-ready-program>

⁶ The Joint Utilities are Central Hudson Gas & Electric Corporation, Con Edison, New York State Electric & Gas Corporation, Niagara Mohawk Power Corporation d/b/a National Grid, Orange and Rockland Utilities, Inc., and Rochester Gas and Electric Corporation.

- Multi-unit Dwelling – A multi-unit residential building with five or more dwelling units.
- Participant – An entity that applies for and receives incentives through the Make-Ready Program. This includes:
 - Developer – An entity for designing, constructing and commissioning an EV charger site. This entity may also be responsible for owning, managing and operating the chargers.
 - Equipment owner – The entity that purchases and owns the EV charging equipment once it is installed.
 - Site Host – The owner of the site on which the EV charging equipment is installed. The site host may or may not be the equipment owner.
 - Customer – An entity taking service from O&R.

B. Eligible Equipment or Infrastructure

There are two categories of make-ready infrastructure eligible for incentives under the Make-Ready Program:

1. **Utility-side Make-Ready Infrastructure:** Utility electric infrastructure needed to connect and serve a new EV charger. This may include traditional distribution infrastructure that will be owned by O&R, such as step-down transformers, overhead service lines, and utility meters.
2. **Customer-side Make-Ready Infrastructure:** EV equipment or infrastructure necessary to make a site ready to support an EV charger that is owned by the charging station developer, equipment owner, or site host. This electric infrastructure may include conductors, trenching, and panels needed for the EV charging station.

All Customer-side make-ready infrastructure must be installed by Approved Contractors in order to be eligible for incentives under this Make-Ready Program. Additional infrastructure may be eligible for incentive as part of future-proofing (see Section III. B. for details).

C. Eligibility Criteria and Incentives

A project must satisfy the following criteria in order to receive an incentive through the Make-Ready Program:

1. **Approved Application:** Prospective participants must submit an application on the O&R website⁷ detailing the proposed EV charging project. O&R will review, evaluate, and as appropriate, approve applications.
2. **Station Maturity:** Construction of the EV charging station must have commenced after July 16, 2020.
3. **Locational Capacity:** EV charging stations must follow capacity guidelines which include:
 - a. Charging stations must have a minimum of two plugs. The number of two-plug stations that can receive incentive through the Make-Ready Program is limited to no more than 50 percent of the target number of plugs within the O&R service territory.
 - b. DCFC stations with more than ten plugs and/or demand in excess of 2MW will only be allowed to participate in the Make-Ready Program if development of the site does not cause O&R to incur new business costs greater than the cost that would be incurred to develop a site with a maximum demand of 2MW.
 - c. The number of plugs at locations in excess of ten plugs cannot exceed 50 percent of O&R's target number of plugs established in the EV Make-Ready Order.

D. Make-Ready Incentive Levels

O&R will provide make-ready incentives to Participants following the criteria and levels described in Table 1. No single Participant shall receive incentives equal to or greater than 50 percent of the Company's total make-ready incentive budget.

⁷ <https://www.oru.com/en/our-energy-future/technology-innovation/about-electric-vehicles/electric-vehicle-make-ready-program>

Table 1. O&R Make-Ready Eligibility Criteria

		Up to 50%	Up to 90%	Up to 100%
Accessibility		Non-publicly accessible sites, including workplace and privately-owned pay-to-park lots	Publicly accessibly sites, including municipal paid parking	
Plug Type	Level 2	Sites utilizing proprietary plugs	Sites utilizing non-proprietary, such as SAE J1772 plugs	
	DCFC	Sites utilizing proprietary plugs	Sites utilizing non-proprietary plugs, or, at sites where a proprietary plug type is collocated at a station with an equal number of non-proprietary plug types of equal or greater charging capacity	
Disadvantaged Communities				Sites located within or near a Disadvantaged Community (see additional information below)

E. Approved Contractors

As specified in the Make-Ready Order, to be eligible for the program, Participants are required to use Joint Utilities-approved contractors. Contractors self-certifying to meeting certain criteria will be noted as approved by the JU for use in the Make-Ready Program, which will be posted to

the JU website⁸ which will be linked from the O&R landing page. Participants may choose from among the approved contractors for inclusion in their program application.

Contractor Approval Process

Contractors wishing to be approved for participation in the program must provide self-certification that they:

- are registered to do business in the State of New York,
- indicate the area(s) in the State where they plan to do make-ready work, and
- have all the appropriate licenses and certifications needed to do work in those area(s).

A common New York State application for use by contractors to become approved for the Make-Ready Program will be available on the JU website.

The JU, in consultation with New York Department of Public Service (“DPS”) Staff, can suspend or remove a contractor from the posted list of Approved Contractors if the JU or Staff becomes aware of non-compliance with any of the criteria or if there are performance or other concerns raised. Contractors falling out of standing can be reinstated upon demonstration of renewed criteria compliance or successfully completing the reinstatement process.

F. Disadvantaged Communities

For EV charging sites located within one mile of Disadvantaged Communities, incentives of up to 100 percent of make-ready infrastructure costs may be available. O&R will provide this 100 percent incentive until such Make-Ready Program expenditures reach 20 percent of its authorized incentive budget, after which the Company will continue to support development within Disadvantaged Communities at the standard applicable 90 or 50 percent incentive levels. Sites eligible for the 100 percent incentive include:

1. Publicly accessible DCFC sites utilizing non-proprietary plugs, located within one mile of Disadvantaged Communities.
2. Level 2 sites located in multi-unit dwellings within one mile of Disadvantaged Communities.

⁸ <https://jointutilitiesofny.org/utility-specific-pages/electric-vehicles/>

III. Make-Ready Program Implementation

In order to quickly stand up and implement the Make-Ready Program, O&R will leverage existing business processes and systems to the degree possible. However, in some cases, the processes and tools needed do not currently exist and will need to be developed in order to administer and manage the Make-Ready Program. Generally, these processes fall into five project phases: 1) Application & Eligibility Determination, 2) Design & Engineering, 3) Incentive Estimation, 4) Construction & Energization, and 5) Monitoring, Verification & Reporting.

Figure 1. O&R Make-Ready Program

Application & Eligibility Determination	Design & Engineering	Incentive Estimation	Construction & Energization	Monitoring, Verification, & Reporting
<ul style="list-style-type: none"> Participant completes and submits application via the online portal O&R receives application and certifies eligibility Initial program level eligibility agreed to 	<ul style="list-style-type: none"> O&R performs initial engineering review to determine utility-sided make-ready work/costs Participant performs customer-side design and provides estimated costs Future-proofing estimate developed 	<ul style="list-style-type: none"> O&R calculates estimated incentive based on customer and utility-sided costs and project incentive level Estimate provided to participant Participant makes final go/no-go decision 	<ul style="list-style-type: none"> O&R and contractor develop project schedule Complete utility and customer-sided construction O&R verify, test and energize charging station 	<ul style="list-style-type: none"> Participant provides invoice O&R verifies operating requirements Payment processing Ongoing monitoring and verification Quarterly and annual reporting via O&R and third-party data aggregator

A. Application Review and Incentive Level

Entities wishing to participate in the Make-Ready Program will be required to apply for the program via the Company’s online application portal. Information regarding the portal, the application process, program eligibility and incentives, and other program information may be found on O&R’s Make-Ready Program landing page, as it becomes available. To apply for the program, Participants will be required to submit the following information via the online portal:

- The Participant’s name, and contact information;
- A description of the project, including the number of plugs, charging output and plug type of each, location (and if located in an environmental justice community), whether demand management software or hardware will be used, whether the EVSE will be bi-

directional (at present or in the future) or exclusively load, and any co-located distributed generation or energy storage;

- Site plan, proof of site control, one-line diagram and anticipated project load;
- Future-proofing needs and site expansion plans (see below);
- Whether the Participant intends to pursue the DCFC Per-Plug Incentive Program in addition to the Make-Ready Program and capture all necessary program information; and
- Name of Approved Contractor for Customer-side work (see Section 1.D. above).

Once an application is received, O&R will assign a project identification number and confirm the required information is provided. O&R will review the application to determine program eligibility, including requesting and receiving from the Participant, as required, additional information or answers to any questions. Once O&R completes the initial review, the Company will engage with the Participant to align expectations. If the eligibility criteria are met, O&R will notify the Participant of the appropriate incentive level which will be applied to the project and update the status in the application portal accordingly.

In the event that an application is incomplete, or an application is determined ineligible, the Company will explain the deficiency or deficiencies to the Participant and allow the Participant to resubmit.

O&R anticipates that the online application portal may initially provide basic functionality. However, in order to support the scaling of the Make-Ready Program and to facilitate the automation of application processing, the Company intends to develop a more robust application platform that will integrate the application process with existing back-end processes and systems. The implementation of an integrated system will be dependent on technical requirements developed during the initial project phase.

B. Design and Engineering

Once the application has been received, O&R will perform an initial analysis leveraging its existing business processes for new service interconnections. The Company's New Business team will schedule and conduct a site review for internal stakeholders and the Participant to discuss the Point of Interconnection ("POI"). Once the POI is finalized, the New Business team will document the POI and a design job will be created in the Company's Work Management System ("WMS") and transmitted to the Design Engineering organization.

Design Engineering will analyze the application to determine whether service upgrades will be necessary to support the station. If service upgrades will be required, a cost estimate will be developed and provided to the Participant for review. If the Participant has chosen to future-proof the project, Design Engineering will provide a cost estimate for the future-proofing work in addition to the baseline cost.

During this time, the Participant will work with the Approved Contractor to develop an estimate of customer-sided project costs. The estimate for the customer-sided costs will be provided to the New Business team when ready. If the total estimated costs of the project exceed the average per-plug installed cost across the Company's service territory, the Company will work with the Participant to evaluate alternative project designs that may reduce estimated project costs. If unable to reduce project costs below 10% of the average per-plug installed cost, O&R may approve the project at a lower incentive level or decline the project.

Future-proofing

In accordance with the Make-Ready Order, O&R will offer participants the opportunity to future-proof sites in order to accommodate future growth at a site at minimal incremental cost. Participants will be required to determine whether they wish to request future-proofing of their site during the application process. Participants will not be allowed to request future-proofing after an application has been accepted. Participants that request future-proofing work must specify their plans for future expansion of the site, including additional plugs, additional power needs, additional parking spots on-site, additional land, and any other relevant information that may be used to make a determination of the feasibility and cost of future-proofing the site.

As part of the Design and Construction stage discussed above, the Company will work with the Participant to determine the feasibility of the future-proofing plans from a grid and site perspective. During the review, O&R will determine whether the site can accommodate additional Make-Ready infrastructure. The evaluation of the proposed future-proofing work may include various factors such as:

- **Plans for expansion:** Is future-proofing needed based on the Developer's plans to install additional plugs or upgrades to a higher kW unit in the future?
- **Expansion feasibility:** Can the site accommodate the identified additional make-ready infrastructure and, if relevant, additional parking spots or higher kW charging equipment?

For each site, future-proofing costs covered by the Program will be limited to no more than 10 percent of the project's make-ready costs. For costs not covered by the O&R incentive, the Participant will be required to pay the excess costs. In this instance, the Company will only conduct any utility-side future-proofing work after securing funding from the Participant.

C. Incentive Estimation

Once a project's design engineering and cost estimates are complete and accepted by all parties, O&R will calculate the estimated incentive taking into account estimated customer and utility-

sided costs and the project's incentive level based on its location, plug-type and accessibility. The future-proofing estimate will be included in the overall incentive estimate calculation up to the limits described above. The estimated incentive will be provided to the Participant who will be required to make a final "go / no-go" decision whether to proceed with the project. If the Participant elects to proceed with the project, the Participant will be required to sign a Program Agreement, agreeing to the site design, service connection layout, incentive offering, and other terms before the Approved Contractor is released to begin construction.

D. Construction & Energization

Once the Program Agreement is signed, the Participant and O&R will coordinate the development of a construction schedule that accommodates both customer-sided and utility-sided work. Once customer-sided work is complete, the Participant will notify O&R. O&R will commission the system.

Following commissioning, the Participant shall provide all invoices itemizing costs incurred by the Approved Contractor as part of the customer-sided construction. O&R will validate the invoices. Program Participants and Approved Contractors are responsible for keeping customer-sided costs within budget. O&R will not be responsible for costs in excess of agreed budgets. Once costs are validated, vendors will be paid directly via check. The Participant shall be responsible for all costs that exceed those estimated by the Participant's contractor.

E. Monitoring, Verification & Reporting

The Make-Ready Order requires each project to meet minimum operating requirements and to be monitored and reported on to inform the PSC on the effectiveness of the program. The following operational and reporting requirements are required of program participants.

Operating Requirements

Participants in O&R's Make-Ready Program will be required to adhere to operational requirements as specified in the Make-Ready Order. Operational requirements include:

- DCFC plugs must be operational 95 percent of the time annually;
- DCFC charging stations must be operational 99 percent of the time annually, with a minimum of half of the plugs considered to be "up" at all times;
- All charging stations in the EV Program must operate for a minimum of five years; and
- Ownership of EV charging stations may change, or stations may be upgraded during the five-year term, as long as the number of plugs and the capacity of the station does not

decrease, and the site continues to meet all performance and reporting obligations of the Program.

Reporting Requirements

Participants agree to provide O&R with the necessary data regarding the installation and use of the EV charging equipment to facilitate necessary tracking of the Program's overall operation and effectiveness via a third-party consultant on a quarterly basis. This data includes:

- Plug and charging session data including:
 - The number of sessions daily;
 - Start and stop times of each charge;
 - The amount of time each vehicle is plugged in per session;
 - Peak kW per charging session;
 - kWh per charging session; and
 - Plug outage information. Plug outage information is to include the number and duration of outages and is to be differentiated by expected outages (for maintenance) and unexpected outages.

- Financial information including:
 - Infrastructure and equipment costs;
 - Fee structure (structure of fee to the end-use customer, i.e., cost per minute, cost per kWh, cost per session and whether the station owner is providing charging for free);
 - Charging revenues derived; and
 - Operating costs, which should include energy-related costs and non-energy-related costs separately identified.

Participants must also consent to allow O&R to share the following information with DPS Staff:

- Utility system and billing information for each EV charging station, including:
 - 15-minute interval data;
 - Load profiles for the EV charging stations for the top ten demand days of each year; and
 - Utility bills differentiated by delivery service-related costs and energy-related costs.

As stated in the Participant Guide, participants that fail to provide the required data will not be eligible for new Make-Ready Program incentives and will either be required to repay Make-

Ready payments received or be subject to revocation of service so that the station can be operated by an alternate market participant.⁹

IV. Outreach and Education

O&R will expand its outreach and education efforts to move beyond driving customer adoption of EVs to informing potential site hosts, developers, dealers and other potential stakeholders on the opportunity offered by the Make-Ready Program. To maximize participation in the program, the Company's outreach and education plan will focus on identifying potential participants and priority sites for EVSE development. Efforts will then be concentrated on developing and delivering outreach and education using methods and tactics targeted to those opportunities.

A. Target Participants

A primary component of the Company's outreach and education plan will be to identify key stakeholders and participants for targeted outreach. Some types of participants the Company anticipates targeting may include:

- EVSE Developers – O&R will establish and expand relationships with EVSE developers in its service territory in order to collaborate on identifying key areas and plans for development, understanding site development needs and to inform developers of program requirements.
- EV Dealers – O&R will expand its ongoing dealership outreach efforts to include the Make-Ready Program in its dealer outreach efforts. Beyond participating in the program themselves, EV dealers are a key piece of the Company's outreach efforts as a source of knowledge for potential EV customers.
- Fleet Customers – O&R will identify and conduct outreach to customers in its service territory that maintain light-duty vehicle fleets to make them aware of the opportunity to participate in the Make-Ready Program. In addition, for fleet owners and operators for all vehicle classes (light, medium- and heavy-duty), O&R will educate them on the Company's Fleet Assessment Service.
- Commercial Customers – Commercial customers represent an opportunity as likely site hosts for EVSE developers and as stakeholders in the development of EV chargers which may attract business. O&R will work with its commercial customers to educate them on

⁹ Make Ready Program Order, p. 107.

the benefits of hosting EV chargers and the opportunity to take advantage of the Make-Ready Program.

- **Real Estate Developers** – Real estate development firms in the Company’s service territory serve as a large opportunity to develop EV charging infrastructure as part of their development plans. The Company will conduct outreach to developers in order to make them aware of the opportunity to take advantage of the program incentive to install EVSE as part of their projects.

B. Prioritization

The Company’s outreach and education efforts will be focused to promote the development of charging infrastructure where it is most cost-effective and provides the most benefit to O&R’s customers. O&R will execute targeted outreach efforts by leveraging the suitability criteria developed in the Order as follows:

- i. Load Serving Capacity:** One of the strongest predictors of low-cost EV charging infrastructure is the capacity of the electric distribution system to accommodate the additional charging load without significant upgrades. To make this information available to developers, the Company will develop a Load Serving Capacity map to provide developers with a signal as to areas of the system which have the most available load serving capacity and will result in lower cost to develop. To meet the timing requirements of the Order, O&R will approach the Load Serving Capacity mapping in two phases: Phase 1, projected to be completed by December 31, 2020, will consist of basic calculations to provide simple load serving capacity at the feeder level. Phase 2 will automate load calculations leveraging the Company’s DRIVE tool. By leveraging the load serving capacity maps, developers will be able to more easily identify areas of lower-cost infrastructure development.
- ii. EV Charging Infrastructure Forecast:** The purpose of the Charging Infrastructure Forecast will be to assist in identifying areas in the Company’s service territory where the need for EV charging infrastructure is anticipated. The forecast will be developed internally and will consider inputs such as customer type and existing and anticipated EV ownership to identify areas of potential EV-driven load growth. The forecast will be used to inform the Company’s Capital Planning process and to target and prioritize outreach and education efforts to developers and site hosts, with a focus on smaller businesses which may otherwise be unfamiliar with the details of the Make-Ready Program. The Forecast will inform O&R’s outreach and education activities to increase EV and EV infrastructure awareness, and ultimately drive EV adoption through the availability of public charging infrastructure development.

- iii. Strategic Locations:** Strategic Locations are those that account for sites that may contain societal benefits and may not otherwise be identified by analysis of load serving capacity or charging infrastructure forecasts. Strategic locations may include environmental justice (“EJ”), LMI, or disadvantaged communities or areas with unique “public health benefits or network attributes that expand access to rural and hard-to-reach communities.”¹⁰ Once identified, O&R anticipates adding strategic location information to the Company’s hosting capacity maps. Prior to submitting a program application, Participants will be able to reference the maps to determine whether the site in question falls into strategic location and may be eligible for a higher incentive.

O&R will continue to coordinate with the JU, DPS Staff and other stakeholders to define EJ, LMI and DAC for inclusion as strategic locations. O&R will then apply that criteria to the Company’s territory to identify eligible locations and will leverage the existing hosting capacity maps to advise potential program Participants with information on where these areas exist.

C. Marketing and Communications Tools and Mechanisms

Based on the potential participant type, the Company will develop targeted marketing materials and tools to inform and engage stakeholders. In addition to the Company’s Make-Ready Program website, the Company will promote the use of its load serving capacity maps and other online tools such as its EV Advisor to educate potential customers and program participants about the benefits of hosting EV charging stations and areas with lower cost of development. The Company will develop marketing and communications materials for use across multiple communications channels tailored to each type of target participant or potential customer.

V. Fleet Assessment Service

As part of the Make-Ready Program, O&R will offer a Fleet Assessment Service to light, medium- and heavy-duty vehicle fleets in its service territory to assist them in their transition to EVs. Initially the service will concentrate on providing site feasibility and rate analyses to assist

¹⁰ Make-Ready Order, p.114

fleets in understanding the transition and operating costs of switching to electric vehicles. A description of these services is below.

Site Assessment

The site feasibility analysis will be based on the maximum power draw of an electrified fleet to determine if the local distribution system can accommodate that increased load. The site feasibility analysis will include all planned utility work on the distribution system both nearby and on the infrastructure serving the existing depot, to find cost-saving synergies that may exist. If the site feasibility analysis is positive, the utility will offer the customer a rate analysis, working to understand the maximum costs fleet electrification may incur and how to implement best practices and managed charging to mitigate these costs.

Rate Analysis

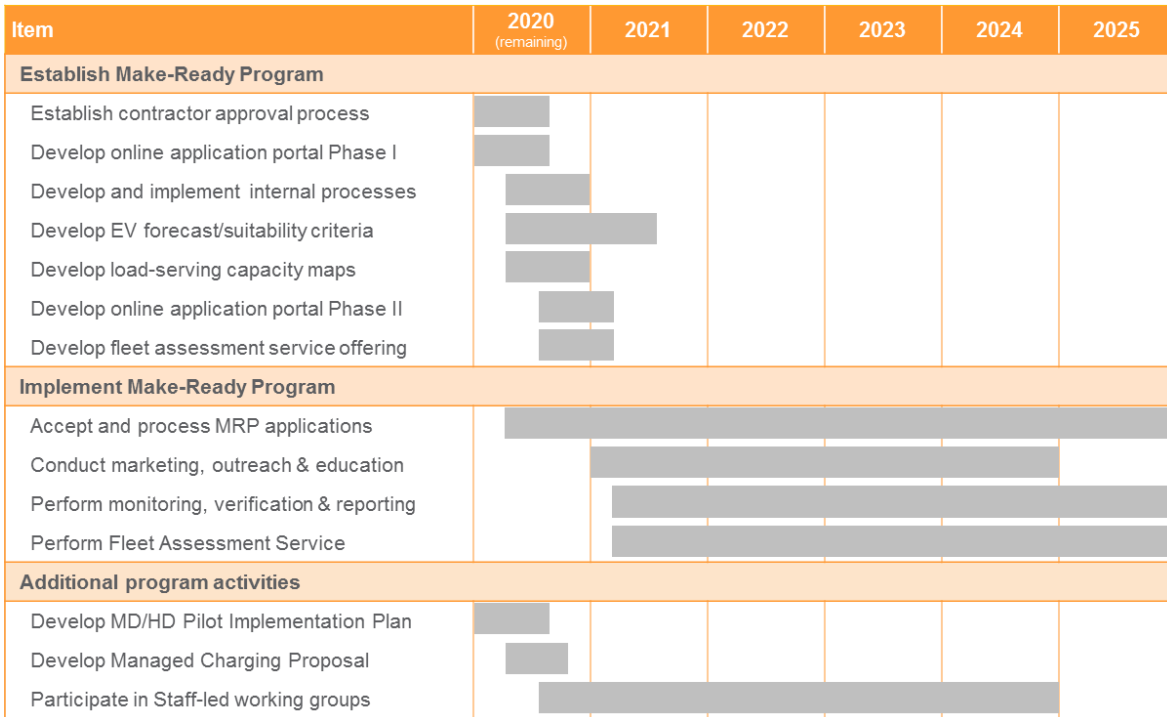
The rate analysis will be tailored to each depot location, and the fleet manager would understand all rate options available, as well as a reasonably certain range of costs they may expect based on their charging behavior.

As the Company begins to provide fleet assessment services, it is anticipated that significant learnings will be gained from working with customers to understand fleet electrification needs and that services may be identified that utilities could provide to fleet customers. As part of its Fleet Assessment Service, O&R will conduct customer satisfaction survey to gather input from participating fleets. The survey will ask questions such as whether the participants found the analysis useful, how likely they are to electrify their fleets in the near- and long-term, what the biggest barriers to fleet electrification are, and what additional services may be provided by the Company to support fleet electrification, among others. The results of the survey will be used to inform the development of future Fleet Assessment Services.

VI. Implementation Timeline

Figure 2, illustrates the Company's anticipated high-level implementation timelines for the Make-Ready Program. The Company's primary focus in implementing the program will be the development of the processes and tools needed to begin accepting and vetting program applications to facilitate participants wishing to participate in the program as soon as possible. Subsequent Company efforts will focus on streamlining and automating Company processes to continue to improve the customer experience and further expedite the administration of program incentives.

Figure 2. O&R Make-Ready Program High-Level Schedule



VII. Program Costs, Third-Party Support and Administrative Needs

O&R’s overall Make-Ready budget is established at \$23.7 million set by the Make-Ready Order, including incentive and implementation costs. Table 2 outlines the Company’s budget allocation for the duration of the Make-Ready Program.

Table 2. O&R Make-Ready Program Budget (\$000’s)

<i>Item</i>	<i>Total</i>
<i>Incentive Budget</i>	\$19,262
<i>Level 2 Budget</i>	\$15,676
<i>DCFC Budget</i>	\$3,586
<i>Futureproofing</i>	\$1,541
<i>Implementation and Fleet Assessment</i>	\$2,890
<i>Total</i>	\$23,692

Of O&R’s total program budget, \$2.89 million is allocated to implementation and fleet assessment services. O&R’s implementation budget is allocated as follows:

Table 3. O&R Make-Ready Implementation Budget (\$000’s)

<i>Item</i>	<i>Total</i>
<i>Program Implementation, Execution and Administration</i>	\$1,400
<i>Third-Party Support</i>	\$500
<i>Third-Party Reporting</i>	\$50
<i>Marketing</i>	\$300
<i>IT Projects</i>	\$540
<i>Fleet Assessment</i>	\$100
<i>Total</i>	\$2,890

As discussed in the Order, utilities’ existing processes and procedures for providing service to the EVSE sector will not be sufficient to meet the goals of the Make-Ready Program. In order to meet the increased needs of the Make-Ready Program, O&R anticipates adding additional full-time staff to the Company’s Utility of the Future team. In addition, the Company sees the need for additional personnel throughout the Company to accommodate additional support functions that will be required under to program such as application screening, eligibility verification, business development, community relations, project management, and incentive administration.

In order to meet the timely requirements of the Order, O&R will also require the services of third-party resources to provide subject matter expertise and to provide support and management to the program such as in the development of new processes and tools necessary to manage the Make-Ready Program. These resources are anticipated to be short-term to bridge the gap until such time as full-time resources can be brought on and internal Company subject matter expertise can be developed. In addition, per the requirements of the Order, the Company, with the JU, will hire a third-party data aggregator to anonymize charging data.

O&R also anticipates IT costs associated with the Company’s front-end portal which will be used to process Make-Ready Program applications and, over time, integrate with other internal platforms to automate back-end activities required to streamline application processing. Costs include initial set-up, configuration, and ongoing subscription payments as well as future integration costs, set-up costs and monthly fees associated with a third-party platform which the Company will use to pay incentives and track program performance.