

iQMS Project Proposal Track 2 – Electric Vehicle Charging

Please do not change margins or font size. Please do not exceed 10 pages (excluding supporting documents). Upload supporting documents separately. Please include resumes of key personnel in the supporting documents.

Project Title

Please provide a descriptive and concise title for your project. (Max. 10 words)

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Commented [Q(2R1)]: how many you think as max for descriptive and concise? 10? 5?

Commented [H(3R1)]: *10 words

Lead Organization

Please name the lead organization.

Project Summary

Please provide a summary of your project. You may use the same project summary provided in the online submission form. (Max. 500 words)

Partnering Distribution Utility

1. Provide the name of this project partnering distribution utility, if not the lead organization.
2. Please provide an overview of the partnering utility by including details such service territories, number of customers, regulating bodies (if applicable), and online links to existing service load request procedures and details.

Please provide the above information per utility, if more than one utility is collaborating on this project.

Project Team & Roles (Max. 1 page)

1. List all teams collaborating in this project. Include no more than two key personnel or decision makers, per team.
2. Provide a brief description of each team's roles and responsibilities. When applicable, please list all involved functional departments in a partnering utility.

Please do not include resumes or biographies of key personnel. Provide links to LinkedIn or public online profiles, instead. Resumes of key personnel should be included as part of the supporting documents.

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Problem Statement

1. Describe current or anticipated challenges in your service load request services or procedures related to mid-scale (100 kW-5 MW) flexible demand electric vehicle charging projects.
2. Please specify how significant these challenges are for this project team and EV charging customers.
3. Please provide quantitative estimates (e.g., staff time to review applications) to highlight the scale of these challenges.

Current Practice(s)

Please describe the partnering utility current queue management practices and systems, and the teams who use them to address these challenges. Please highlight limitations or deficiencies

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Proposed Solution(s)

Please describe key features of the proposed queue management solution this project team plans to explore, test, and possibly implement to overcome current limitations or deficiencies and stated challenges.

Benefits of Proposed Solution(s)

1. *Please describe a value proposition, a business case, or potential benefits to the partnering utility teams and their EV charging service customers, by implementing the proposed solution.*
2. *Please describe quantifiable benefits (e.g., time, cost), if possible, to highlight scale of potential improvement.*

Alignment with Priorities

Please describe briefly how the proposed solution aligns with the partnering utility priorities, interests, and goals. Please describe, actions taken, or decisions made which demonstrate commitment to execute the project successfully.

Project Objectives

List top three objective statements for this project.

Tasks & Outputs

Phase 1: Get Ready (8 months)

1. *Please provide a brief breakdown of tasks your project team will perform in Phase 1 of this program. Please organize your tasks around key themes (e.g. Strategic Planning, Design & Development, Analysis & Evaluation, Outreach & Communications) instead of a chronological order.*
2. *For each task, please describe at least one milestone and completion month. Please use milestones that demonstrates progress or eliminates a major risk or marks the completion of a key output or deliverable.*
3. *Please highlight potential risks to completing proposed tasks successfully. Describe actions the project team will take to mitigate such risks.*
4. *Please ensure details, in this section, include the following:*
 - a. *How your team may seek approvals (e.g., regulatory), to demonstrate the proposed queue management solution under real-world conditions or with participating customers (e.g., a new process pilot).*

Commented [SS7]: Link to ENERGYWERX webpage for description of Phase 1

- b. *How your team will design and develop an enhanced or new solution using or expanding existing capabilities or developing new capabilities internally or working with vendors or solution providers, when applicable.*
 - c. *How your team will demonstrate readiness to advance to Phase 2 activities.*
 - d. *A milestone to provide a detailed plan for how the team will implement the proposed solution in Phase 2.*
 - e. *A public facing summary report or presentation to share takeaways and lessons learned, without disclosing confidential, proprietary or sensitive data or information.*
 - f. *A go/no-go decision point(s) milestone for pursuing Phase 2*
5. *Please provide high-level estimates of your budget breakdown for this phase showing how your team plans to allocate provided funds for this phase.*
 6. *If the applicant is submitting applications for both Track 1, Generator Interconnection, and Track 2 EVSE Service Load Request, describe how there is overlap amongst the proposed tasks and/or efficiencies that will be leveraged for successful transformation of both interconnection and service load request queues.*

Phase 2: Demo (16 months)

1. *Please provide a brief breakdown of tasks your project team will perform in Phase 2 of this program. Please organize your tasks around key themes (e.g. Stakeholder Engagement/Regulatory Approval, Pilot Implementation, Evaluation & Outreach) instead of a chronological order.*
2. *For each task, please describe at least one milestone with an expected completion month. Please use milestones that demonstrate progress or eliminate major risks or mark the completion of a key output or deliverable.*
3. *Please highlight potential risks to completing proposed tasks successfully. Describe actions the project team will take to mitigate such risks.*
4. *Please ensure details, in this section, include:*
 - a. *How your team will secure required approvals (e.g., regulatory) to demonstrate the proposed queue management solution under real-world conditions or by collaborating with participating interconnection customers.*
 - b. *How your team will pilot the solution under real-world conditions or by collaborating with participation interconnection customers.*
 - c. *How your team plans to implement, the piloted solution at scale in the partnering utility service territories (e.g., multiple service territories, or across multiple states if utility crosses multiple states).*
 - d. *A public facing summary report or presentation to share takeaways and lessons learned, without disclosing confidential, proprietary or sensitive data or information.*
5. *Please provide high-level estimates for a budget breakdown for this phase showing how your team plans to allocate this phase provided funding.*
6. *If the applicant is submitting applications for both Track 1, Generator Interconnection, and Track 2 EVSE Service Load Request, describe how there is overlap amongst the proposed tasks and/or efficiencies that will be leveraged for successful transformation of both interconnection and service load request queues.*

Envisioned Key Results

1. *Assume this project was impactful as your team envisioned and consequently transformed the partnering utility service load request services by 2030, please describe how you define this such successful transformation using quantifiable indicators for 2030. Please do not use more than five indicators.*
2. *Briefly describe how you plan to baseline and track these quantifiable indicators during and after the project ends.*