

Liberty Drive

Rebates for Installation of Level 2 Electric Vehicle Charging for
Residents and Small Businesses

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Please ensure you are reading the most recent version of this handbook by visiting the Liberty Drive website at <https://libertyutilities.com/>. Choose your community, then find the Drive program listed on the main page.



1 Program Overview

- 1.1 The Drive Program is authorized by California Public Utilities Commission (CPUC) Decision 18-09-034 and is subject to changes made by Liberty and the CPUC.
- 1.2 The Drive Program supports the advancement of transportation electrification by providing financial support to eligible customers who install qualified electric vehicle (EV) chargers in the Liberty service territory in California.
- 1.3 The Drive Program provides a one-time rebate payment to help offset hardware, permitting and installation costs.
- 1.4 Applications must be submitted online through the Liberty application portal, [PowerClerk](#).
- 1.5 Rebates are available on a first-come, first-served basis.
- 1.6 Participating customers take service under an applicable Liberty Electric Vehicle Time-of-Use rate.
- 1.7 Residential applicants may apply for a rebate up to 60 days after the installation of qualified EV charging equipment or may apply in advance of installation for a Rebate Reservation to reserve the rebate for **6 months** from the date of issue.
- 1.8 Small Business customers must apply prior to starting construction for a Rebate Reservation to reserve the rebate for **1 year** from the date of issue.
- 1.9 Applicants that have received a Rebate Reservation must (a) complete construction and installation, (b) provide documentation showing approval by the local building department (if required) and (c) submit the Rebate Request *on or before* the expiration date of the Rebate Reservation to remain eligible for rebate.

- 1.10 Installations must be completed by a licensed California electrical contractor (C-10).
- 1.11 All Small Business installations must be permitted by the local building authority.
- 1.12 Rebates are issued to the Payee designated by the Host Customer. The Payee must complete IRS form W-9 and will receive an IRS form 1099 from Liberty for the rebate amount at the end of the tax year in which the rebate was paid.
- 1.13 Liberty is not responsible for changes in customer consumption or resulting impact to billing as a result of the installation of an electric vehicle charger.
- 1.14 Liberty is not responsible for the operation, maintenance, or energy consumption of the electric vehicle charger.

2 Budget and Rebate Rate

2.1 Installation Targets and Program Budget

The Drive Program is intended to support 1,000 Residential charger installations and 250 Small Business installations. Liberty reserves 100 Residential rebates for Liberty customers who qualify for and participate in the [CARE \(California Alternate Rates for Energy\)](#) program rate.

Program status and availability of incentive funding is shown on the regularly updated PowerClerk log-in page.

Customer Type	Total Installations
Residential	900
Residential – CARE	100
Small Business	250

The Drive Program rebate budget of \$1,750,000 is allocated between Residential and Small Business customers and available on a first-come, first-served basis until the rebate budget has been paid and/or fully reserved.

2.2 Rebate Amount

The rebate may pay for up to 100% of actual costs to install the charger. Eligible costs include charging equipment, installation labor, permitting, design, and any required upgrades to the existing electrical system necessary for the installation of the electric vehicle charger. This includes costs for Small Business applicants to establish a separate commercial electrical service, if necessary.

Not more than one Drive Program rebate will be paid for each Liberty service account.

Customer Type	Maximum Rebate
Residential	\$1,500*
Small Business	\$2,500*

*The rebate amount will not exceed the actual installation costs, as demonstrated by invoices provided in the Rebate Claim process.

3 Eligibility

3.1 Participants

A participant in the Drive Program must be a **Liberty customer** from one of the following customer types:

- Residential. Customer on a domestic service rate who currently owns or leases a plug-in electric vehicle (PEV) that was acquired after June 30, 2017.

- Small Business. Customer taking Liberty service on a Small General Service rate (A-1, TOU-A-1 or A-1 TOU-EV)

Liberty customers who do not qualify for or opt out of the Drive Program may install electric vehicle charging equipment. Contact Liberty for more information about new electric service for EV charging.

3.2 Equipment

Due to the changing nature of EV charging equipment, the up-to-date eligible charger list is maintained in the online application. In order to qualify for rebate, chargers must meet these requirements:

- New and not previously installed.
- Approved by a Nationally Recognized Testing Laboratory (NRTL).
- ENERGY STAR® certified.
- Provide at least one J1772 charging connector.
- Network enabled through these standards (or equivalent, if accepted by Liberty):
 - Open Charge Point Protocol (OCPP) 1.5 or later.
 - OpenADR 2.0b.
- ✓ Residential charger manufacturers providers agree to provide annual usage data directly to Liberty.
- ✓ Small Business chargers must be on the [CEC/CalEVIP list of approved chargers](#).

Residential chargers that meet the above eligibility requirements but have not yet been qualified for the Drive Program will not be visible in the online application. Applicants can submit documentation demonstrating the eligibility of their selected charger through the online application. Liberty reviews proposed equipment, and if approved the charger will be added to the list of eligible chargers.

4 Participation Requirements

4.1 Installation

All installations, both Residential and Small Business, must be completed by a licensed California electrical (C-10) contractor. All Small Business projects require a building permit from the local building authority; however, some Residential projects may not require a building permit. The installer is responsible for determining the local building permit requirements for Residential projects.

4.2 Access and Siting

Small Business participants must install charger(s) in a location that is accessible to the public and register the location with the [Department of Energy Alternative Fuels Data Center](#).

Participants must meet applicable building code requirements under the local building authority, which may include Americans with Disabilities Act (ADA), fire access, parking space minimum and other requirements. Liberty is not responsible for ensuring that the installation meets applicable requirements but reserves the right to inspect and confirm compliance.

4.3 Operation

Chargers must be connected to the internet according to manufacturer guidelines, registered with the manufacturer, and actively connected to the charge network service provider. Participants are responsible for maintaining internet service that is adequate for networked operation of the charging station.

Small Business participants may impose fees for usage of the charger. The Small Business owner and employees may use the charger but the participant agrees to keep the charger available on a first-come, first-served basis.

Participants to keep the charger the original installation location for ten years after installation.

4.4 Time-of-Use Rate

Participants will be enrolled in the applicable Electric Vehicle Time-of-Use rate following completion of the installation, except existing net metering customers who will remain in the NEM rate.

See [Time-of-Use Rates](#) for more information.

4.5 Usage Data Sharing

Participants must share charger usage data with Liberty for the full Drive Program term of ten years in order to meet applicable CPUC reporting requirements. Liberty is required to provide participants' anonymous charger usage data to the CPUC yearly to help understand usage patterns and driver needs, and to inform future utility programs.

- Residential participants consent for the charger manufacturer to share data directly with Liberty.
- Small Business participants agree to contract with a qualified network service provider to provide required data for the full term of the Drive Program.
- Small Business participants provide usage and transaction data via the management platform for the charger or their authorized network service provider.

5 Roles

5.1 Host Customer

The Host Customer is the customer of record as named on the Liberty electric bill at the service location where the charger is installed. The Host Customer has the right to designate an Applicant and/or a System Owner to act on their behalf.

5.2 Applicant

The Applicant is the individual or company who completes, submits, and manages the Drive Program application for the electric vehicle charging project.

5.3 Installer

The Installer is the individual or company installing the charger and completing any other upgrades required for charger installation. Installers must have an active C-10 license with the California Contractors State License Board.

If an Installer's license is suspended or otherwise inactive, applications submitted with the Installer are not eligible to receive a Reservation Notice. Likewise, rebate payments cannot be issued unless the installation was completed and inspected by the local building authority while the Installer license is active. Customers may select a different Installer during the application process. See the [Application Changes](#) section of this Handbook.

5.4 System Owner

The System Owner is the individual or entity who owns the charger at the time the rebate payment is issued. The System Owner may be the Liberty Host Customer, or a third party designated by the Host Customer.

5.5 Payee

The Payee is the individual or company who receives the rebate payment. The Payee is indicated by the Host Customer as part of the Rebate Request and may be the Host Customer or any third party.

6 Application Process

6.1 Submission

Applications must be submitted online through the Liberty application portal, [PowerClerk](#). Applications may not be submitted by mail, fax or directly to Liberty. Applicants must be registered PowerClerk users. Applicants registered with other PowerClerk utility programs can access Liberty's application portal by selecting "Change Program" from the dashboard of any utility program. New users complete a registration on the PowerClerk log-in page. Reach the PowerClerk landing page [here](#). PowerClerk tracks projects through all stages of review, approval and completion. Participants receive regular email communications from Liberty through PowerClerk and may view the status of their application(s) at any time by logging in to PowerClerk.

Residential Applications

Residential applicants may apply for a rebate up to 60 days after the installation of qualified EV charging equipment OR may apply in advance of installation for a Rebate Reservation to reserve the rebate for **6 months** from the date of issue.

The following documents are uploaded and submitted in the initial residential application:

Copy of electric bill	Must be from within the last six months
Evidence of owned or leased PEV	EV must have been acquired after June 30, 2017

Small Business

Small Business customers must apply prior to starting construction for a Rebate Reservation to reserve the rebate for **1 year** from the date of issue.

The following documents are uploaded and submitted in the initial Small Business application:

Copy of electric bill	Must be from within the last six months
Site Plan	Must show layout of proposed charger(s) on property

1.1 Review

Liberty reviews applications for completeness and if further information or corrections are required, Liberty notifies the Applicant.

1.2 Reservation Notice

For Small Business applicants, and Residential applicants who apply prior to construction, Liberty sends a Reservation Notice when the application is approved. This notice indicates the date of the reservation, the reserved rebate amount and the expiration of the reservation. The actual rebate payment cannot exceed the maximum amount listed on the Reservation Notice. The Host Customer has the sole right to the Reservation Notice.

1.3 Construction

After receiving the Reservation Notice from Liberty, Small Business applicants may begin installation activities. Residential applicants may install up to 60 days prior to initial application.

1.4 Project Completion

A charger installation is considered completed when it is completely installed, the building permit is satisfied (i.e., signed off by building inspector), and the charger can operate as designed.

1.5 Rebate Claim

When the project is completed, the Applicant requests payment of the rebate by submitting the Rebate Request in PowerClerk *prior* to the expiration date listed on the Reservation Notice.

The following documents are uploaded and submitted in the Rebate Request:

Residential and Small Business

Satisfied Building Permit *	Must clearly show site address and date of inspection
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Copies of invoices for equipment and labor	Must be itemized and to show labor, equipment and permitting costs
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* Residential applications may not require building permits. Consult the installation contractor or the local building department for requirements.

1.6 Review

Liberty reviews the Rebate Request for completeness. If further information or corrections are required, Liberty notifies the Applicant.

1.7 Required Documents

When the Rebate Request is validated, Liberty emails the Host Customer (and Payee, if not the Host Customer) a request to eSign** required documentation.

Rebate Claim Form and Participation Agreement	Host Customer confirms installation details, rebate amount, designates rebate Payee and acknowledges Drive Program responsibilities
IRS Form W-9	Payee confirms tax information

** Documents are securely signed using DocuSign. Applicants may request that required documentation be printed, signed, scanned and uploaded (i.e. “wet signed”), however the wet sign process increases processing times.

1.8 Rebate Payment

When required documents are received and approved Liberty authorizes rebate payment to the Payee. Rebate checks are sent via postal mail **to the address provided in the Rebate Request**. Payments are typically issued 30 days after approval of the Rebate Request.

2 Inspections

2.1 Pre-construction and Post-construction Inspections

Liberty may, at its sole discretion, inspect Drive Program project sites at any point after an application is approved. Inspections conducted prior to construction verify information provided in the original application, including site location, and proposed equipment placement. Inspections conducted after construction is complete verify that information provided in the Rebate Request matches the as-built system. Liberty will work with the Applicant to correct deviations from the approved application, as feasible. However, material deviations can result in adjustments to rebate amounts or forfeiture of the rebate. Liberty will coordinate with the Host Customer to arrange site access.

3 Application Changes

3.1 Installation Location

Applicants and Host Customers may change the installation address of a reservation to another Residential or Small Business address with the same Host Customer. Changes must be requested in writing or by email to Liberty. The terms of the original Reservation Notice apply to the new installation location, and Applicant is responsible to ensure that the Application is revised to include accurate information.

3.2 Applicant, Installer and System Owner

Host Customers may change or rescind affiliation with the Applicant, Installer, System Owner or Payee identified in the original application by providing timely written notice to Liberty.

4 Cancellation, Withdrawal, Forfeiture

4.1 Cancellation

An application that has not yet been approved and issued a Reservation Notice may be cancelled by written or verbal request from the Applicant, Installer, System Owner, or Host Customer.

4.2 Withdrawal

An application that has been issued a Reservation Notice may be withdrawn from the Drive Program by written request from the Host Customer. Liberty requests timely notification upon a Host Customer's decision to withdraw an application in order to make the reserved funds available to other customers.

4.3 Forfeiture

The rebate is forfeited if:

- The project is not completed according to program requirements, and identified deviation(s) cannot be corrected, or
- The complete Rebate Request is not submitted by the expiration date listed on the Reservation Notice.

Projects that forfeit the rebate are still eligible to operate if all requirements for service under applicable Liberty Electric Rules are met.

For More Information

We're here to help. If you have any questions, please reach Liberty directly.

Phone: **530-543-5286**

Email: CAElectricVehicle@LibertyUtilities.com

Web: libertyenergyandwater.com/DriveSolutions

