

CPRG Implementation Grant Budget Narrative

Massachusetts Comprehensive Fleet Electrification Initiative

Total Program Budget by Year							
	Cost Category	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
DIRECT COSTS	Personnel	\$184,814	\$201,447	\$219,578	\$239,339	\$260,880	\$1,106,058
	Fringe	\$83,739	\$91,276	\$99,491	\$108,445	\$118,205	\$501,155
	Travel	\$0	\$0	\$0	\$0	\$0	\$0
	Equipment	\$0	\$0	\$0	\$0	\$0	\$0
	Supplies	\$0	\$0	\$0	\$0	\$0	\$0
	Contractual	\$8,462,311	\$10,838,946	\$18,393,236	\$22,236,564	\$24,956,751	\$84,887,807
	Other	\$4,445,119	\$452,415	\$455,572	\$458,794	\$462,079	\$6,273,979
	Total Direct Costs	\$13,175,983	\$11,584,084	\$19,167,876	\$23,043,142	\$25,797,915	\$92,769,000
INDIRECT COSTS	Total Indirect Costs	\$497,464	\$410,877	\$468,716	\$474,278	\$480,284	\$2,331,619
TOTAL CPRG FUNDING REQUEST		\$13,673,446	\$11,994,961	\$19,636,592	\$23,517,420	\$26,278,199	\$95,100,619

Personnel Total: \$1,106,058

Estimated annual salaries include a 4% cost of living increase per year. Final salaries may include annual step increases in addition to cost of living but will depend on the final position designation and associated bargaining unit; MA DOER has assumed a 5% annual step increase for the positions starting in Year 2.

Program Coordinator III “Project Manager” (TBD)

Role and Responsibilities: The Project Manager will play a crucial role in the successful implementation of this new Massachusetts program effort. With a proven track record in sourcing, installing, and assessing EV charging infrastructure, the Project Manager will oversee the entire project lifecycle. Responsibilities include project planning, resource allocation, timeline management, and coordination with various stakeholders. The Project Manager will also oversee the coordination of various stakeholders to achieve project goals.

Annual Salary, Year 1: \$92,407 @ 100% Full-Time Equivalent (FTE)

Program Coordinator III “Outreach Manager” (TBD)

Role and Responsibilities: The role of the Outreach Manager involves developing and implementing policies to enhance accessibility, managing projects to promote EV adoption among fleets, and ensuring compliance with relevant regulations. With a background in community engagement, this role will be responsible for liaising outreach efforts to underserved and hard-to-reach communities. The Outreach Manager will act as a bridge between the project team, internal entities (such as MA OEJE) and external entities, including community members, fleet stakeholders, workforce development partners, utility companies, and government agencies. The Outreach Manager will be responsible for collecting and tracking fleet data and reporting, including to US EPA and other entities.

Annual Salary, Year 1: \$92,407 @ 100% Full-Time Equivalent (FTE)

Fringe Benefits Total: \$501,155

The Massachusetts Fringe Benefit Costs Recoupment (D09) is a simplified calculation of 45.31% of salaries, which includes 43.20% fringe costs plus 2.11% payroll tax. Fringe includes mandated transfer of charges for pension, health insurance and terminal leave expenditures from federal grants, expendable trusts, capital accounts and all other nonbudgetary accounts to centralized state administrative accounts. It also includes employer share of Unemployment Compensation Insurance Premium, Universal Health Insurance, and Medicare Tax; these latter charges apply to all position types. Full details can be found here: https://www.macomptroller.org/wp-content/uploads/fy-memo_2024-08.pdf.

Travel Total: \$0

Equipment Total: \$0

Supplies Total: \$0

There are no costs associated with travel, equipment, or supplies that are not already included in the contractual costs.

Contractual Total: \$84,887,807

MA DOER believes that this proposal, which builds upon and expands preexisting medium- and heavy-duty (MHD) vehicle programs administered by competitively procured vendors, demonstrates a comprehensive approach and the use of these preexisting programs as a baseline will enable grant funds to be expended efficiently and in a timely manner. Given that many of the contractual cost estimates are based upon existing funding and cost structures, MA DOER further believes that the proposed grant expenditures are reasonable for accomplishing the proposed goals, objectives, and measurable environmental outcomes described in this application. Contractual costs fall into four categories, each of which are detailed below: 1) expanded fleet advisory services, 2) revised vehicle rebate program, 3) charging infrastructure deployment, and 4) outreach, engagement, and compensation for knowledge.

1) Expanded Fleet Advisory Services (Mass Fleet Advisor)

Name of Organizations: Massachusetts Clean Energy Center (MassCEC) and CALSTART

Performance Period: All years

Total Performance Period Budget: \$7,403,000

Key Task	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
Administrative Costs of Expansion	\$0	\$0	\$221,000	\$221,000	\$221,000	\$663,000
Fleet Technical and Procurement Assistance	\$0	\$0	\$2,000,000	\$1,000,000	\$1,000,000	\$4,000,000
Outreach and Marketing	\$0	\$0	\$400,000	\$350,000	\$300,000	\$1,050,000
Portal Creation and Maintenance	\$500,000	\$200,000	\$150,000	\$100,000	\$50,000	\$1,000,000
Hotline	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$500,000
Driver/Mechanic Workshops	\$0	\$0	\$30,000	\$30,000	\$30,000	\$90,000

Dealer Training	\$40,000	\$20,000	\$20,000	\$10,000	\$10,000	\$100,000
ESTIMATED TOTAL	\$640,000	\$320,000	\$2,921,000	\$1,811,000	\$1,711,000	\$7,403,000

Description of Activities:

The Mass Fleet Advisor (MFA) Program, which assists medium- and heavy-duty fleet operators with planning for and procuring electric medium- and heavy-duty fleet vehicles, is funded by MassCEC and administered by a third-party vendor and a team of subcontractors. The MFA program is administered in conjunction with MassCEC by the CALSTART, a contractor who was competitively procured prior to this application for the Grant Award. This competitive procurement was executed pursuant to the procurement processes required by MassCEC's enabling legislation, M.G.L. c. 23J, and in compliance with the Uniform Grant Guidance. CALSTART did not provide assistance in the development of application materials for this funding opportunity. MassCEC will work with CALSTART to maintain, modify, design, manage, market, and implement the Mass Fleet Advisor Program. CALSTART will continue working with participating fleets to provide technical assistance, which includes vehicle replacement analyses, total cost of ownership estimates, charging station operation and siting recommendations, and state, federal, and utility incentive and tax credit availability and eligibility. CALSTART will also provide procurement assistance, including driver and mechanic training workshops, standard operating procedures, and managed charging assistance, for fleets that purchase vehicles and participate in the MOR-EV Trucks Program. CALSTART will subcontract with a marketing consultant who will continue to develop and disseminate marketing materials through strategic channels such as billboards, public transit, and fleet supply and parts houses to ensure fleets are aware of and sign up for the program.

CALSTART will provide technical assistance to up to 400 fleets (200 of which are enabled through the infusion of CPRG funding) and procurement assistance to up to 150 fleets, which assumes that each fleet receiving procurement assistance would purchase between 1-5 vehicles through MOR-EV Trucks. More likely, small fleets will purchase 1-2 vehicles, which leaves incentives available for large fleets to take advantage of. Mass Fleet Advisor will specifically focus on small fleets, community-based fleets, and fleets in LIDACs that are more likely to face resource and technical knowledge barriers. Through this funding, MFA will develop an Electrification Portal that will allow fleets to access electrification information, sign up for Mass Fleet Advisor, and apply for incentive funding within one centralized website. MFA contractors and/or subcontractors will be responsible for creating and maintaining the Portal with up-to-date information and resources. MassCEC will also competitively procure a consultant to staff an Electrification Hotline, which will be made available for fleets to call with questions about incentive eligibility, vehicle models, charging station considerations, and any other questions that can be answered briefly outside of the formal Mass Fleet Advisor analysis process. Additionally, MassCEC will hire a consultant to conduct dealer training for medium- and heavy-duty vehicles. Dealer training will consist of in-person workshops and online modules and will include MA-specific information about state, federal, and utility incentives and tax credits. Training strategies will be conducted in coordination with any parallel MOR-EV outreach to dealers.

2) Revised Vehicle Rebate Program (MOR-EV)

Name of Organization: Center for Sustainable Energy (CSE)

Performance Period: All years

Total Performance Period Budget: \$70,555,496

Key Task	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
Vehicle Rebate Payments Issued (see “Proposed Vehicle Rebate Level Information” below), CPRG portion	\$6,085,205	\$8,904,050	\$13,856,075	\$13,856,075	\$21,626,945	\$69,280,375
Added Rebate Program Administrative Costs (personnel, program design/setup, website updates, program materials, administrative and applicant support, program operations support, data analysis, and reporting)	\$331,414	\$236,006	\$236,006	\$236,006	\$236,006	\$1,275,440
ESTIMATED TOTAL	\$6,416,620	\$9,139,977	\$14,092,002	\$19,044,027	\$21,862,872	\$70,555,496

Description of Activities:

The MOR-EV Program is intended to reduce air pollution emissions in the Commonwealth by increasing the use of medium-duty and heavy-duty on-road electric vehicles, including trucks, buses, and vans, and is currently administered by a third-party vendor. The MOR-EV program is administered in conjunction with MA DOER by the Center for Sustainable Energy (“CSE”), a contractor who was competitively procured prior to this application for the Grant Award. This competitive procurement was executed pursuant to Massachusetts procurement law and in compliance with the Uniform Grant Guidance. In preparation of this Budget Narrative, MA DOER requested budget estimates from CSE to understand the cost of the proposed scaling up of the MOR-EV program. The selected vendor shall work with MA DOER to maintain, modify, design, manage, market, and implement the MOR-EV Program to implement the revised MHD rebate program as provided for herein that will seek to increase ZEV adoption. The vendor shall develop a revised program to provide rebates to qualified applicants for medium- and heavy-duty vehicles over 10,000 pounds GVWR to be administered alongside the MOR-EV Trucks Rebate Program for all-electric pickup trucks and Class 2b ZEVs. The vendor shall work with applicants directly to collect documentation and process the associated vouchers and rebates, which includes developing an amended voucher reservation system within the application portal for all eligible vehicles under this program. Applicants shall be able to submit documentation confirming their eligibility and intent to purchase an eligible vehicle via the application portal to reserve a voucher. Voucher documentation will be reviewed by the vendor prior to sharing with MA DOER for approval and issuance of the voucher. Upon voucher approval, the applicant will have between twelve and eighteen months to upload the remaining documents to confirm vehicle acquisition and complete the rebate application. The applicant may also request an extension of twelve months. An additional extension may be granted for demonstrated good cause. Extension requests are to be submitted through the vendor and approved by MA DOER. After submission of all required documents by the applicant, the vendor will review documents for accuracy

before sharing with MA DOER for approval. Upon MA DOER approval, the vendor will issue the rebate payment to the applicant or to the dealership, if directed by the applicant and approved by MA DOER.

Proposed Vehicle Rebate Level Information

Prior to program launch, MA DOER may adjust the base rebate levels in conjunction with the best available market data at that time. The following assumptions were used to calculate the corresponding budget estimate for 750 rebates across vehicle classes; MA DOER is aiming to electrify 750 vehicles through the program to increase the number of medium/heavy-duty EVs on the road by ten times the current amount. Under the proposed program design, individual rebates cannot equal more than 80% of the total vehicle cost unless the eligible vehicle also qualifies for the diesel scrappage adder, which increases the maximum cost coverage to up to 90%. Related assumptions about the impacts of federal tax credits and existing MOR-EV funding and sunk costs are included under the “Estimated Ancillary State Funding” section of this narrative.

Estimated ZEV Rebates Issued by Class, by Year	Year 1 2025	Year 2 2026	Year 3 2027	Year 4 2028	Year 5 2029	SUBTOTAL
Class 3	30	40	60	80	90	300
Class 4	15	20	30	40	45	150
Class 5	7	10	15	20	23	75
Class 6	7	10	15	20	23	75
Class 7	7	10	15	20	23	75
Class 8	7	10	15	20	23	75
SUBTOTAL	73	100	150	200	227	750

For total projected rebate spending by year, see the Budget Spreadsheet (file name: Budgetcalcs_MA-DOER.xlsx.).

Rebate Values	Class 3	Class 4	Class 5	Class 6	Class 7	Class 8
Number of Base Rebates ¹	300	150	75	75	75	75
Base Rebate Value ²	\$30,000	\$60,000	\$90,000	\$120,000	\$150,000	\$180,000
LIDAC Adder (50% of base value) ³	\$15,000	\$30,000	\$45,000	\$60,000	\$75,000	\$90,000
Small Business Adder (25% of base value) ⁴	\$7,500	\$15,000	\$22,500	\$30,000	\$37,500	\$45,000
Community-Based Fleet Adder (25% of base value) ⁴	\$7,500	\$15,000	\$22,500	\$30,000	\$37,500	\$45,000
Diesel Scrappage Adder (15% of base value) ⁵	\$4,500	\$9,000	\$13,500	\$18,000	\$22,500	\$27,000
Large Fleet Subtractor (–50% of base value) ⁶	\$(15,000)	\$(30,000)	\$(45,000)	\$(60,000)	\$(75,000)	\$(90,000)

1. Proportion of rebates by vehicle class is based on the current percentage of on-road ICEVs that are ≥5 years old (i.e., those with greater replacement potential) in Massachusetts.
2. Rebate structure accounts for the Federal Commercial Clean Vehicle (CCVC) Tax Credit. Using ZEV vs. gas/diesel vehicle incremental cost data from the Mass Fleet Advisor and MOR-EV programs, to inform the necessary incentives required to help fleets achieve total cost of ownership parity, MA DOER used broad-

based assumptions about the credit value by vehicle class because the credit is issued on an incremental cost basis. The full value of these estimated tax credits has then been split in half across the assumed number of rebates to be issued, for two primary reasons: the first is because incremental costs vary significantly even within a single vehicle class so the exact credit amount will vary (e.g., based on analyses using actual Massachusetts fleets, the incremental cost of Class 8 school bus may be around \$100,000, while for a Class 8 refuse truck the incremental cost may be as high as \$600,000); the second is that not all fleets, particularly small fleets, will have tax liability and therefore would not qualify for the CCVC.

3. Budget estimate assumes 40% of base rebates across all vehicle classes will receive adder given Massachusetts commitment to direct at least 40% of program funds to LIDACs.
4. Budget estimate assumes 30% of rebates across all vehicle classes will include either the small business or community-based fleet adder in line with the MA DOER objective to prioritize outreach to and engagement with these fleets through CFEI programming.
5. Budget estimate assumes 1.5% of base rebates will receive the diesel scrappage adder on the assumption that primarily larger fleets (>50 vehicles) will have the financial resources to comply with the adder requirements, commensurate with the large fleet subtractor assumption (see below).
6. Budget estimate assumes 1.5% of base rebates will receive the large fleet subtractor based on the percentage of unique fleet garaging locations in the Commonwealth that have >50 vehicles.

3) Charging Infrastructure Deployment (MassDEP)

Name of Organization: MassDEP

Performance Period: All years

Total Performance Period Budget: \$5,496,182

Key Task	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
EVSE Rebates Issued	\$1,055,765	\$1,055,765	\$1,055,765	\$1,055,765	\$1,055,765	\$5,278,825
Added Administrative Costs for Program (e.g., program setup and additional personnel FTE)	\$40,940	\$42,168	\$43,433	\$44,736	\$46,079	\$217,357
ESTIMATED TOTAL	\$1,096,705	\$1,097,933	\$1,099,198	\$1,100,501	\$1,101,844	\$5,496,182

Description of Activities:

MassDEP will process applications for funding for make-ready infrastructure, charging equipment and other costs, reviewing applications for completeness and accuracy, contacting applicants with questions, and issuing grant paperwork. MassDEP will process payment requests for approved grants, reviewing payment requests for completeness and accuracy, contacting grantees with questions, and issuing grant payments. This budget estimate assumes issuing funding to support installation and upkeep at approximately 260 fleets sites, including 115 chargers (the remaining chargers funded through utility programs to the extent eligible), 5-year networking and software packages to cover chargers for 750 vehicles and 5-year maintenance, extended warranty and support packages to cover chargers for 750 vehicles. The CFEI coalition partners believe that the availability of the federal tax credit in certain LIDACs will serve as an adder to further improve the costs of electrification for locations in LIDACs and non-urban areas.

4) Outreach, Engagement, and Compensation for Knowledge

Name of Organization: Center for Sustainable Energy (CSE) and local community-based organizations

Performance Period: All years

Total Performance Period Budget: **\$1,433,134**

Key Task	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
Upfront culturally competent outreach, marketing, and education	\$27,950	-	-	-	-	\$27,950
Ongoing culturally competent outreach, marketing, and education	\$94,036	\$94,036	\$94,036	\$94,036	\$94,036	\$470,184
Tiered subcontracting costs for Massachusetts CBOs to facilitate engagement	\$175,000	\$175,000	\$175,000	\$175,000	\$175,000	\$875,000
Compensation for knowledge (e.g., community stipends)	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000
Printed materials and collateral	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
ESTIMATED TOTAL	\$308,986	\$281,036	\$281,036	\$281,036	\$281,036	\$1,433,134

Description of Activities:

Through the collaboration of these contractors and building off the existing MOR-EV culturally competent outreach campaign administered by CSE, CFEI aims to ensure financial integrity, enhance education and outreach services, and effectively engage with diverse communities, including hard-to-reach populations. CSE and its subcontracted community-based organizations (CBOs) play a critical role in contributing to the success and inclusivity of the program, and will be responsible for leading the expanded outreach, transcription, and translation services for electric vehicle education and outreach under the MOR-EV/CFEI program. This includes but is not limited to:

- Industry Engagement: Actively engage with original equipment manufacturers (OEMs) and upfit/retrofit companies, as well as any authorized third-party dealers and distributors, to explain vehicle eligibility and voucher application process and to market the program; host webinars and training sessions for OEMs with eligible vehicles in coordination with any parallel Mass Fleet Advisor industry engagement.
- Community Engagement: Establish direct contact with hard-to-reach communities to raise awareness about the electric vehicle incentive program. Through funded CBOs, create strong partnerships to provide outreach and provide ongoing training and support for the CBO to be informed, engaged and supported on this effort. Have CBO partners organize town hall meetings, workshops, and webinars specifically tailored to environmental justice communities. Collaborate with local community centers, faith-based organizations, and other organizations to host events in LIDACs.
- Culturally Competent Outreach: Develop outreach materials, including education fact sheets, brochures, flyers, and videos to address misconceptions of the technologies, in multiple languages commonly spoken in LIDACs. Incorporate culturally competent messaging and visuals to connect to the LIDAC explaining benefits to the community both direct and indirect. Partner with local influencers, community leaders, and organizations trusted within the LIDACs to expand the message

and outreach efforts. This may also include transcribing informational materials, webinars, and educational content into written form for broader accessibility.

- Cultural Competency Training: In collaboration with CBO partners and community leaders, provide training to staff members on cultural nuances and sensitivities to facilitate respectful and impactful outreach.
- Educational Campaigns: Launch targeted educational and engagement campaigns through social media platforms, local community newspapers and CBO newsletters. Offer educational resources, such as fact sheets and guides, addressing common questions and misconceptions about electric vehicles and fleets.
- Stakeholder Collaboration: Establish other partnerships with environmental justice organizations, advocacy groups to leverage their expertise and networks. Collaborate with any state funded and utility EV infrastructure programs to partner and promote efforts. Partner with community colleges and high schools with auto repair courses and present information on the program to inform and raise awareness to the upcoming workforce in the auto repair industry.
- Evaluation: Conduct surveys and feedback sessions to assess the effectiveness of outreach activities and gather insights for improvement. Track metrics such as community participation, in events and workshops in LIDACs. Adjust outreach strategies based on feedback and evaluation findings to better meet the needs of environmental justice communities. Gather feedback from community members to inform ongoing program improvements and ensure alignment with community needs.
- Compensation for Knowledge: Establish and administer a funding structure designed to provide commensurate compensation to community members and organizations who provide feedback on the program design and/or outreach strategies as well as provide compensation for CBOs that will assist in facilitating outreach in LIDACs.
- Cultural Sensitivity: Ensuring that outreach materials and educational content are culturally appropriate and resonate with the target audience.

Other Cost Total: \$6,273,979

The two subawards are targeted at workforce development; these pre-apprenticeship and community college programs are a key element of our strategy to build a skilled workforce for the electrified medium/heavy-duty vehicle sector.

Education and Workforce Development Subawards	Total Cost Over 5 Years
Subaward for development of a dedicated zero emission program/certificate at Massasoit Community College (MCC), the only public institution of higher education that currently offers a MHD vehicle technician training program, for college and continuing education students.	\$3,773,979
Subaward for the development and implementation of EV training programs within existing automotive career technical education programs through a grant program administered by the Massachusetts Department of Elementary and Secondary Education (MA DESE). The grant will focus on geographic diversity to fund schools in different parts of the state.	\$2,500,000

The estimated subaward to MCC includes personnel, fringe benefits, travel, equipment, supplies, certificate program development, and direct and indirect costs. A full-time program coordinator will be responsible for project implementation, including establishing employer partnerships, developing student outreach, professional development for curriculum development, collaborating with partners to design

an apprenticeship pathway for diesel technicians, procuring equipment and supplies, budget oversight and ensuring timely and accurate reporting on both programmatic and fiscal aspects of this project. The salary is in accordance with the applicable union contract, with an anticipated 2% increase in years 2-5. Travel costs include domestic travel by the program coordinator and lead instructor for professional development throughout the performance period. The primary costs relate to equipment: MCC intends to purchase electric vehicle components, including AC electric motors synchronous and non-synchronous, inverters, DC-DC converters, high voltage cabling, high voltage electric air conditioning compressor and high voltage electric air compressor for the air brake system; an EV simulator for safe testing and troubleshooting of high voltage propulsion systems; electric over hydraulic training simulators for safe testing of high-pressure hydraulic systems used in MHD EV refuse and trash compacting equipment; two EV chassis; an electric forklift and charger; two 40-foot long trailers for storage; and facility infrastructure upgrades to accommodate EV technology. If awarded, applicable purchases will comply with the Build America, Buy America Act and prevailing wage requirements. The second biggest cost category encompasses the delivery of a pre-apprenticeship technician training certificate program that will serve 96 individual students over the performance period. The MCC subaward estimate also includes supplies (e.g., EV communication adapters and software).

The subaward to MA DESE for career technical education (CTE) programs in Massachusetts will establish a grant program to cover the inclusion of a BEV comprehensive programming for high school students, in 3-5 existing automotive CTE programs. This eligible costs under this funding would include program costs related to purchase of instructional equipment, such as a battery simulator or BEV chassis, and administrative needs to incorporate the curriculum into the programs. In addition, a portion of the subaward to MA DESE will be carved out for MassCEC's workforce development division to cover staff time for a senior program manager, travel, meetings, and subcontractors tasked with curriculum development. A member of MassCEC's workforce development team will be responsible for working with MA DESE to manage the grant program and aid awarded CTE programs in implementing the BEV curriculum into their program. MassCEC's workforce development division will also work towards developing curriculum to create a standard across CTE programs.

Indirect Cost Total: \$2,331,619

The allocation of indirect costs is essential to support the administrative and operational infrastructure that enables the effective implementation of our GHG reduction strategies. Below is a breakdown of the key elements justifying the inclusion of indirect costs.

Total Indirect Staffing Costs: \$1,081,619

The indirect costs associated with staffing (MA DOER personnel and contractual personnel costs) utilize an indirect cost rate of 23.84%, which is the anticipated Massachusetts rate for FY2025. The expected rate is being assumed across the entire performance period for the purpose of the budget estimate but is subject to change.

Total Contingency Fund Costs: \$1,250,000

A modest contingency fund of within the indirect costs is essential to address unforeseen challenges or minor changes to the project. This ensures the project remains adaptable and responsive to emerging issues without compromising the overall goals of GHG reduction. The amount has been set as approximately 1.3% of the total grant request budget, divided equally across the performance period.

Estimated Existing State Program Funding: \$23,500,000

The following existing state programs are likely to have funding to contribute to the CFEI effort; these estimates were created to prorate the relative emissions impacts from existing state funds versus potential CPRG funding. The annual breakdown of the cost table below is further detailed in the Budget Spreadsheet (file name: Budgetcalcs_MA-DOER.xlsx).

It is imperative to note that these state program funding estimates are based on historic data (programs #1 and #3), which may not be indicative of future spending during the performance period, and/or are not guaranteed to be available throughout the performance period (programs #1, #3, and #4).

Existing State Programs	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
1. Existing MOR-EV Funds	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000
2. Existing Mass. Fleet Advisor Funds	\$2,022,750	\$918,250	\$0	\$0	\$0	\$2,941,000
3. Existing MassEVIP Funds	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$225,000
4. Existing Utility Funds	\$3,066,800	\$3,066,800	\$3,066,800	\$3,066,800	\$3,066,800	\$15,334,000
Subtotal	\$6,134,550	\$5,030,050	\$4,111,800	\$4,111,800	\$4,111,800	\$23,500,000

1. The Existing MOR-EV Funds estimate assumes continuation of current program spending on rebates in the MHD segment. Program spending in 2023 included \$35.7M in rebates issued to light-duty vehicles (90.8%); \$2.6M for all-electric pickup trucks and Class 2b ZEVs (6.6%); and roughly \$1M in MHD rebates, approximately 2.5% of 2023 rebate expenditures. MOR-EV incentive funding is subject to an overall budget that also includes light-duty vehicles; the rate of funding draw-down across the suite of MOR-EV rebates will impact the availability of funding for Class 3-8 ZEV incentives.
2. Existing MFA funds include current program spending on technical assistance, program administration, and marketing. MassCEC has been approved to expend \$2,941,000 in Mass Fleet Advisor operational funding between 2025 to 2026.
3. Existing MassEVIP Fleets Funds estimate assumes continuation of current program spending on rebates in the medium-duty vehicle segment. Medium-duty vehicle incentive program spending from March 2023 to March 2024 was \$45,000.
4. Existing utility funds come from two of the state's investor-owned utilities: National Grid was approved for \$30M in spending for light-, medium- and heavy-duty charging over four years, or \$7.5M in each of 2023 through 2026. The same level of funding was assumed for 2027 through 2029. Eversource was approved for \$3M in spending for medium- and heavy-duty charging over four years, or \$0.75M in each of 2023 through 2026. The same level of funding was assumed for 2027 through 2029. The combined five-year utility budget for fleet charging has been prorated based on the assumption that 571 Level 2 and 63 Level 3 utility-funded ports anticipated under CFEI will receive an average of \$22,000 per Level 2 charging port and \$44,000 per Level 3 charging port in utility funding, for a total of \$3.1M per year or \$15.3M over five years.