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MA Fleet Advisory Services Program 2022 Annual Report

National Grid

May 15, 2023

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Section 1: Executive Summary

The transportation sector has overtaken electric generation as the United States' largest source of greenhouse gas ("GHG") emissions, and the electrification of fleets represents a major opportunity to address the challenge of reducing GHG emissions in the Commonwealth. Fleets are uniquely poised to electrify their vehicles; however, they face numerous economic and operational challenges. The upfront costs associated with purchasing an electric vehicle ("EV") as well as costs associated with electric vehicle supply equipment ("EVSE") are a challenge for fleets looking to electrify. Some of the operational challenges include varying duty cycles, operations and maintenance changes, site layout concerns, the potential for variable electricity costs, and varying fleet makeup from light-, medium-, and heavy-duty vehicles to on- and non-road vehicles.

The MA Fleet Advisory Services Program ("MA FASP") was proposed by Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid ("Company") to provide fleet customers with the analysis, knowledge, and long-term technical assistance needed to overcome the challenges they face on their fleet electrification journey. MA FASP was approved by the Massachusetts Department of Public Utilities ("DPU") on September 30, 2019, to conduct a total of 100 fleet engagements with 30 in environmental justice communities, for Massachusetts public fleets at no cost to the customer. Public fleets in Massachusetts are divided into five eligible categories: municipal (city/town), state, federal, transit and public universities & colleges. The Company has contracted with ICF Incorporated, L.L.C. ("ICF") to administer MA FASP through August 31, 2024.

MA FASP launched in September 2020. MA FASP was designed with an initial, soft launch period. This soft launch phase included ten fleets that went through the advisory process including recruitment, scoping for eligibility, program intake, fleet customer data collection, analysis and fleet assessment report drafting, and report delivery. To deliver a more effective program, findings and lessons learned from this initial, soft launch were then incorporated into the broader program launch through a formal expansion strategy process. Please see MA DPU 22-63 Exhibit NG-MM-14 for the 2021 Fleet Advisory Services Plan Annual Report.

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Section 1.1: Program Highlights

Participation

- 1. In 2022, MA FASP delivered 32 fleet assessment reports, resulting in a cumulative total of 54 fleet assessment reports delivered since its launch in September 2020.
- 2. A total of thirty-one (31) fleet assessment reports are in progress as of January 1, 2023 resulting in a cumulative total of 85 (54+31) participants in FASP since its launch in September 2020.
- 3. In 2022, MA FASP 48 fleet participants enrolled in the program with 32 of the 48 fleets (67%) within EJCs, exceeding the 30% target for EJCs. Since the program's inception, 65 of the 85 participants (76%) are within EJCs.
- 4. In 2022, FASP delivered two report refreshes with eight more refreshes planned so far in 2023 and plans to continue to promote this opportunity to past participants.

Fleet Study Results and Benefits

- 5. MA FASP identified commercially available EV options for more than 72% of the vehicles included in the 2022 studies. Of those on-road vehicles with EV equivalents, 64% were recommended for conversion to an EV. Of the 3,386 vehicles assessed, 2,452 have active, on-road EV equivalents, and 1,565 were recommended for conversion.
- 6. In 2022, the 1,565 fleet vehicles recommended for replacement with an EV represent an estimated \$86 million in lifetime Total Cost of Ownership ("TCO") savings for fleet customers, and an estimated 264,000 metric tons in lifetime CO2 emissions.

2022 Program Enhancements

7. In 2022 FASP enhanced its offerings for participants including: enhancing the fleet assessment tool (e.g. can now identify vehicles plow-ready and all-wheel drive requirements); expanding the assessment report, adding technical assistance office hours for participants and eligible customers, and enhancing the participants' online portal. Additionally, the FASP team continued to raise awareness of the program through continued stakeholder engagement and scoping calls.

Transition to MA DPU 21-91 Fleet Assessment Services Program

 The Company anticipates enrolling the remaining 15 participants (MA DPU 18-150 total of 100 less 85 participants to date) sometime in 2023. At that time, the Company will launch the MA DPU 21-91 Phase III program.

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Section 2: The MA FASP Process

The Company, in collaboration with stakeholders and MA FASP, has implemented a comprehensive process to assist our customers in identifying cost-effective opportunities to convert their fleet to electric vehicles. The steps in this process include initial outreach and customer engagement, customer fleet data intake, assessment and delivery, and ongoing assistance. Each of these steps are summarized in the following sections.

Section 2.1: Initial Outreach and Customer Engagement

The first step in the fleet assessment process is identifying and prioritizing prospective customers for participation. MA FASP program offerings are presented to prospective customers via multiple direct and indirect outreach channels. Indirect outreach includes customers hearing about FASP by visiting the Company's webpage https://fleetadvisoryma.nationalgrid.com, or through word-of-mouth from existing participants, conferences, meetings, and outreach through external stakeholders listed in Table 1 below.

Direct outreach involves leveraging existing relationships with customers through either the Company's sales representatives or ICF. ICF and the Company's Program Manager ("MA FASP Team") periodically prioritize customers based on criteria including, but not limited to:

- Characteristics of the Fleet
 - o Fleet location, including EJ communities and regional diversity
 - Fleet type (municipal, transit, college, state, federal)
 - o Fleet size
- Customer Engagement
 - Propensity for electrification, based on prior commitments to EVs and broader sustainability initiatives
 - Interest in the Program

The MA FASP Team then actively engages with customers using materials such as a slide deck, brochure, quarterly newsletters, and email to introduce program offerings.

Stakeholder	Outreach	Timing
MA Dept. of Energy Resources (DOER) Leading by Example (LBE)	Q1- 2022 webinar with interested public universities & community colleges. Resulted in four colleges & universities to enroll.	February 16, 2022
Merrimack Valley Planning Commission (MVPC)	Presented at MVPC webinar, resulting in three additional municipalities in the MVPC region to enroll.	September 9, 2022

Table 1: Stakeholder Outreach

Stakeholder	Outreach	Timing
Berkshire Regional Planning Commission (BRPC)	Utilized connections with BRPC to help enroll and spread awareness via e-mail blasts and meeting mentions resulting in three municipalities to enroll.	Monthly
Metropolitan Area Planning Council (MAPC)	Included in MAPC Matters, MAPC's monthly newsletter, and MAPC's Clean Energy Newsletter.	August Issue
	Included in MAPC's EV Subregional handout that the regional lead provided to their customers.	Fall 2022
	Included FASP in their subregional meetings throughout Fall 2022	Fall 2022
Central Massachusetts Regional Planning Commission (CMRPC)	Utilized connections with BRPC to help enroll and spread awareness via e-mail blasts and meeting mentions resulting in one municipality to enroll.	Monthly

Section 2.2: Customer Onboarding & Data Intake

Once a public fleet customer expresses interest in MA FASP, they are guided through the scoping and intake processes by MA FASP's Account Manager. These Account Managers are the designated point of contact for that prospective customer and assigned from initial contact with the customer. Based on lessons learned from the soft launch period, the MA FASP process roadmap was expanded to nine steps as described in Figure 1 below.





To provide an accurate and useful assessment, MA FASP encourages customers to engage key internal stakeholders early. The scoping discussion phase also includes a clear communication of the MA FASP objectives and benefits, time commitment required of the fleet manager and others in the customer's organization, anticipated timelines, and data and other input necessary for the analysis. MA FASP asks customers to sign a Fleet Expectations Document, see Appendix A, to ensure that the customer recognizes and agrees to the responsibilities associated with conducting the analysis.

After a customer signs the Fleet Expectations Document and becomes an active participant of MA FASP, they provide a vehicle dataset using the program-provided Data Collection Form (or in whatever form they have it). Once a vehicle dataset has been shared with the program, the fleet participates in an Intake Call with the Account Manager and Technical Analyst. During the intake call, the technical analyst reviews the fleet's vehicle data, identifies missing data points that will be needed for the assessment, and discusses the assumptions that could be used in the absence of fleet-specific data. This intake call is also used to discuss the fleet's motivations and barriers to deploying EVs, their procurement methods, vehicle special use cases (plowing, police, all-wheel drive), and other qualitative information that is required to generate accurate EV recommendations.

Once the fleet has settled on attributes and assumptions for their existing fleet vehicles, a set of EV replacement recommendations are generated. These initial results are presented to the fleet during the Presentation Delivery call. Participants are then given a week to review and further adjust input assumptions as needed. The last step is the generation and electronic delivery of a comprehensive assessment Report and a supplemental Excel spreadsheet.

Section 2.3: Analysis and Deliverables

The fleet electrification assessment is conducted via a proprietary fleet assessment model ("Model") developed by ICF. MA FASP participants provide existing vehicle data for fleet vehicles garaged within the Company's electric service territory. This data is inputted into the Model which matches the participant's existing fleet vehicles to EV equivalents (based on a 500-vehicle model library) that align with their vehicle type and meet the specified range, plow capability, and drivetrain requirements. The Model conducts a TCO comparison between the EV equivalents and the internal combustion engine ("ICE") alternatives to determine where an EV replacement would be cost-effective. Components of the TCO include:

- Vehicle capital costs
- Annual fuel costs and bill impacts
- Annual maintenance costs
- Charging infrastructure hardware and installation costs
- Potential EV or EV charging grants, other incentives, and utility programs.

The assessment tool maintained the same overall framework in 2022, but certain enhancements implemented in 2022 improved the overall quality and usefulness of the EV recommendations. One enhancement was the incorporation of plow-capability and all-wheel drive (AWD) attributes to the fleet data collection file. Fleets can now specify which vehicles are currently plow capable or AWD capable and would require those performance capabilities in future vehicle replacements. With these performance capabilities also tracked in the Model's EV Library, the Program is able to provide EV recommendations that better match the required use case of the vehicle. The Model's EV Library continue to grow in 2022 as vehicle manufacturers added new EV models. With over 500 EVs in the Program's EV Library, the Program is able to match a wide variety of vehicle use cases to the appropriate EV models.

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The assessment report delivered to participating fleets also received improvements in 2022. Sections were added covering topics including:

- Home Charging
- Vehicle to Grid Charging
- Used EVs
- Alternative Charging Procurement Options
- Towing, Carrying Heavy Loads, and Plowing

Additionally, the non-road section of the report was expanded to include information on additional electric equipment including electric tractors, front loaders, and excavators.

To improve the usability of the results, MA FASP redesigned the Fleet Recommendations Excel Supplement delivered with the Final Report. The Excel supplement allows participants to use an interactive dashboard where they can select one (or multiple) department(s), retirement year(s), or base site(s) to see their vehicle and charger recommendations, TCO savings, and GHG emission reductions based on their applied filters. The Excel supplement provides a comprehensive view of the vehicle-level data and assumptions that went into the model, and the specific outputs returned by the model for each vehicle line item. The interactive dashboard summarizes the vehicle level recommendations and supports the user's ability to extract actionable insights.

The model can be adjusted in the following ways:

- Recommendation Threshold: By default, the Model only recommends an EV when the EV's TCO is less than that of the alternative ICE vehicle. This TCO threshold can be adjusted to enable recommendations for EVs that have a higher TCO than the ICE vehicle by some percent, or the TCO threshold can be removed altogether to view results for a fully electrified fleet.
- Vehicle-to-EVSE Ratio: The Model uses a default "1-to-1" vehicle to charger port ratio but can be adjusted if the fleet intents to share chargers across multiple vehicles.
- Vehicle Procurement: The model can accommodate both purchase and lease options, including a toggle between MSRP pricing/availability and MA State Contract pricing/availability.

Section 2.4: Ongoing Support & Technical Assistance

Participants are provided with access to the online participant portal after signing the Fleet Expectations Document during enrollment. The participant portal provides secure access to their fleet assessment report, report refreshes, EV and EVSE information, trainings, information on commonly recommended EVs, grants, incentives, and EV and EVSE news and events. Participants receive quarterly newsletters via email, see Appendix B. Account managers conduct bi-annual check-ins and monthly technical assistance office hours with participants to discuss opportunities for fleet electrification and a fleet assessment report refresh; but are always available for assistance if needed. Figure 2 notes the road map to fleet electrification that begins once the participant receives their fleet assessment report.

Figure 2: Roadmap to Fleet Electrification



A MA FASP participant is eligible for a fleet assessment report "refresh" twice per year that may contain updated information on:

- EV market conditions, including vehicle availability, automobile manufacturers releasing new EV models for sale or lease in Massachusetts, and changes in technology and pricing;
- Availability of incentive and/or grant funding, including incentive and/or grant programs that may become available at the state, regional and/or federal level for which a customer may be eligible;
- Feedback from participant about the previous fleet assessment report, including data provided for previous fleet assessment report
- Customer budget conditions, including availability in capital budget for EV acquisition.

Table 2: Report Refreshes Delivered and In Progress					
Report Refreshes Delivered in 2022 Report Refreshes in Progress in 2022					
2	8				

In addition to the fleet assessment report, MA FASP provides technical assistance to participants including:

- Presentations to the municipal energy advisory committee and mayor's chief of staff
- Assistance in applying for third-party funding
- Connecting fleets to original equipment manufacturers and procurement organizations
- Providing summaries and statistics on specific electric vehicle models.

MA FASP implemented Technical Assistance Office Hours in 2022, providing time for participants and eligible customers to ask questions, listen to presentations on grant and incentive programs, and discuss new EV models coming to market. Internal and external presenters are also featured and present on a variety of topics. Examples of organizations that presented in 2022 include:

- Electrification Coalition
- Sourcewell

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- General Motors
- ICF Subject Matter Experts (e.g. addressing EV procurement and supply chain issues)

MA FASP made significant updates to the National Grid Fleet Online Portal during 2022. The updates are outlined below:

- Inclusion of a report overview video to help participants understand how to best interpret the different sections of the Assessment Report.
- Addition of the "Vehicle Model" section, which provides overviews of some of the more commonly recommended vehicles across all of our reports.
- Addition of the "You Asked, We Answered" section. MA FASP develops one-pagers for participants when they have a technical assistance question. One-pagers relevant to all participants are posted to this section.

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Section 3: 2022 MA FASP Customer Enrollment

Over the course of the 2022 calendar year, MA FASP enrolled 48 additional fleets, delivered a total of 32 reports, resulting in a total of 85 participants enrolled since the beginning of the program in September 2020.

Table 3 provides the breakdown of enrolled fleets in 2022 by public fleet category.

Category	Number of Participants
Municipal (City/Town)	39
Public University/College & Community College	6
Transit	3
TOTAL	48

Table 3: 2022 Enrollment by Fleet Type

As shown in Figure 3, 67% of MA FASP enrolled fleets in 2022 are within designated EJCs, exceeding the 30% target established in the original filing. Appendix C provides more information on the program participants, EJC eligibility criteria, and the status of the studies (e.g. report delivery date or report status).



Figure 3: 2022 Enrollment by EJC Criteria

M=Minority, I=Income, E-English Isolation

Section 4: Aggregated Fleet Data Analysis & Recommendations

During the 2022 calendar year, the Program delivered 32 fleet assessments reports to participating fleets. Aggregated findings for these 32 reports are presented below.

The program assessed a total of 3,386 on-road vehicles and identified 2,452 vehicles with commercially available EV options. Of those, FASP's analysis identified a total of 1,565 with a TCO greater than "1", signifying they are cost-effective to electrify. See Figure 4.



Figure 4: Aggregated Vehicles Assessed in 2022

In total, converting all 1,565 recommended vehicles to EVs would result in an estimated \$87M in lifetime TCO savings for fleets, and an estimated 264,000 metric tons in lifetime CO2 reductions.

Participants' existing fleet vehicles are categorized into 1 of 19 vehicle type categories (17 On Road Vehicle Types, a Non-Road Equipment Category, and "Other" vehicles). The 17 on-road categories span the typical light-, medium-, and heavy-duty on-road vehicle types. The Non-Road Equipment category contains vehicles and equipment including utility terrain vehicles (UTVs), golf carts, commercial lawncare equipment, backhoes, forklifts, floor-scrubbers, tractors, front-end loaders, and excavators. The "Other" category contains vehicles excluded from the analyses because the fleet vehicle is:

- Limited or no commercially available EV equivalents (e.g. firetrucks, ambulances,)
- Already an EV
- Identified as inactive

Figure 5 shows the percentage of vehicles recommended for conversion to EV by vehicle type category.

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Figure 5: Percent of vehicles recommended for conversion to EV by vehicle type (2022 assessments)

On average, 64% of on-road vehicles with EV equivalents were recommended for an EV replacement. On a percentage basis, certain medium-duty and heavy-duty vehicles had the highest rate of EV recommendations:

- Transit Buses (99%)
- Refuse Trucks (99%)
- Medium-Duty Pickups and Vocational Trucks (80%)
- Shuttle Buses (74%).

This high rate of EV recommendation was largely due to incentives available for medium-duty and heavy-duty vehicles and also due to the significant fuel cost savings seen with MD and HD replacements.

There are several reasons why some vehicles with EV equivalents were not recommended for replacement with an EV:

- The TCO for the alternative ICE vehicle was lower than that of any EV options; or
- Existing fleet vehicle's mileage/duty cycle requirements are not met by available EV options; or
- Plow-capability or drivetrain requirements are not met by the electric equivalent.

Of the 887 vehicles with EV options available that were not recommended, 98 vehicles were not recommended due to the existing fleet vehicle's mileage/duty cycle requirements not being met by available EV options. The remaining 789 vehicles either failed to meet plow-capability or drivetrain (AWD) requirements, or the EVs were not cost effective compared to the ICE alternatives.

As more EV models become available and EV production increases, vehicles costs should decline, which will improve their TCO and be included in future report refreshes.

To support the charging of 1,565 recommended EVs, MA FASP recommends 494 direct current fast chargers (DCFC) and 1,071 Level 2 chargers - see Figure 6. By default, MA FASP conservatively assumes a one-to-one vehicle-to-charger ratio in our analyses, and we do not account for any existing EVSEs at participant fleet facilities. The determination of EVSE type (Level 2 versus DCFC) is based on battery size, range, mileage, number of shifts per day, and time charge between shifts and at night. Through ongoing technical assistance MA FASP and the Company continues to work with participants to efficiently size the EV charging infrastructure for a particular location.



Figure 6: EVSE Recommendations in 2022

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Section 5: Participant Outreach Approach Changes

In 2022, NREL was conducting internal assessments on the federal agency side, which halted engagement with the FASP program. Alternatively, the route-by-route analysis being conducted by MassDOT proved to be complimentary to the FASP report, resulting in a large uptake of RTAs in 2022. With state and federal fleets on hold, MA FASP turned in large part to municipal organizations and direct outreach through internal MA FASP Account Managers.

MA FASP utilized municipal organizations to help spread awareness for the program and ultimately enroll participants. MVPC, BRPC, CMRPC, and MAPC assisted in putting blurbs of the MA FASP program in their newsletters and monthly meeting notices. MA FASP presented at monthly meetings within these organizations to provide introductions to the many cities and towns that participate in these meetings. This resulted in multiple municipalities to engage directly with MA FASP and ultimately enroll as well as help facilitate engagement through word of mouth.

MA FASP also developed a bi-weekly scoping call campaign. Every two weeks, MA FASP Account Managers would hold a scoping call inviting participants to join a webinar-type call where they can learn about the program, process, and deliverables. This resulted in increased program awareness amongst varying fleet types & sizes, and ultimately spurred enrollment for 10+ customers. MA FASP plans to continue bi-weekly scoping calls to maximize awareness of the program within the Company's service territory.

However, the most effective outreach strategy proved to be direct outreach from MA FASP Account Managers and referrals made by participants within the program.

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Section 6: Participant Response

Many MA FASP participants noted that the FASP program has provided an opportunity to acquire the fleet assessments, technical assistance, and financial information required to electrify their fleets and that they would not, otherwise, have been able to assemble this information due to their own resource constraints. MA FASP participants also indicated that prior to the FASP program they have not seen their respective fleet data analyzed and reported out to them in a single, comprehensive report. This summary provided an electrification roadmap that enables MA FASP participants to take specific steps towards electrifying their fleet, as listed in Table 4 below.

Steps Taken	Number of Participants
Incentive/Grant Funding Applications Submitted	13
Installing EVSEs	11
Included EV & EVSE in Master Plans	10
Ordered EV(s)	9
Incentive/Grant Funding Awarded	8
Released Electrification Policies	3
Adding EVSE Loads to New Garage Facilities	3
Publicized partnership with MA FASP	2
Implemented Report as Educational Tool	1

Table 4: Steps taken toward Fleet Electrification by MA FASP Participants (2022)

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Appendices

- A: FASP Report Timeliness Performance Incentive
- B: Fleet Expectations Document
- C: 2022 Newsletters
- D: Timeliness Incentive Statistics
- E: FASP Converted Fleet Performance Incentive

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APPENDIX A: FASP Report Timeliness Performance Incentive

Participant	Timeline (Days)
Town of Topsfield	90
Lowell Regional Transit Agency	90
City of Fall River	86
Town of Ayer	85
Town of Bolton	88
Town of Westford	89
Bridgewater State University	86
City of Marlborough	84

Table 5: FASP Reports delivered within 90 Days

ICF receives a timeliness incentive up to \$2,684 for a report delivered in three months or less from the date of the intake meeting, with an earnings cap not to exceed 25% of the allocated budget for FASP performance incentives (\$145,000)¹. In 2022, ICF achieved the maximum earnings for this incentive with the eight reports delivered above.

¹ The remaining 75% of the FASP performance incentive budget is discussed in Appendix E.

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APPENDIX B: Fleet Expectations Document



National Grid MA Fleet Advisory Services Program Fleet Expectations

National Grid and ICF are pleased to partner with [FLEET NAME] to provide data, analysis, technical support, and other resources to transition your fleet from internal combustion vehicles to electric vehicles (EVs). Services will be provided through the National Grid MA Fleet Advisory Services Program (Program).

ICF will provide a customized fleet assessment report that will include the cost and emissions analysis and other information necessary to help inform [FLEET NAME]'s decision-making process. The work required to complete this report is primarily conducted by ICF and is 100% funded by National Grid. However, [FLEET NAME]'s commitment and time are necessary to provide the quality of report needed to support your fleet's transition to EVs. Therefore, please review the Participant Requirements and sign below.

Participant Requirements

	Mo	ath]	Mo	nth]	Mo	nth]	[Mo	nth]	Through August 2024
Intake Call									
Data Collection									
Analysis									
Analysis Presentation									
Final Report Delivery									
Program Feedback Survey									
Report Refreshes									As needed*
Technical Assistance									Ongoing

1. Project Timeline: Review and commit to the project timeline below:

* A participant may request up to two report refreshes per year. The first report refresh will be at least six months after the initial report, unless procurement schedules or changes to vehicle model availability warrant a refresh sooner.

- Staff Time: A commitment of your staff time of up to 10 hours for Program activities in the first 3 months and 2-4 hours annually thereafter, through August 2024. Participant staff will be responsible for providing fleet data, responding to data questions from the ICF team, providing feedback on the initial analysis, and responding to bi-annual checkins from the Program.
- Project Lead: Identify a project lead to serve as ICF's point of contact and respond to inquiries in a timely manner. If the project lead leaves the organization before August 2024, it is [FLEET NAME]'s responsibility to identify new contact and notify ICF. While the project lead will serve as the primary point person for ICF, [FLEET NAME] should

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involve all organization decision makers in the data collection and report delivery process.

- Fleet Data: Gather and share, to the extent possible, fleet data as requested by ICF. This will include fleet operations and maintenance information, as well as vehicle attributes and duty cycle data.
- Analysis Presentation: Schedule and participate in a call with ICF to deliver the fleet assessment analysis, discuss any questions, and provide feedback.
- Feedback: Provide feedback on the Program through a customer survey to help improve the customer experience. [FLEET NAME] agrees to allow National Grid and ICF to publicly share Program feedback collected through the survey and other Program communications.
- Status Updates: Provide updates to ICF on the fleet's progress towards its electrification goals.
- Report Sharing. Allow National Grid and ICF to share [FLEET NAME]'s fleet assessment report and report refreshes publicly, as appropriate.

Please note that failure to adhere to these requirements may result in early termination of the fleet assessment report and redirection of project resources to other eligible fleets.

Signature	Title	E-Mail
Name of Project Lead	Phone	Date

ICF Requirements

To help ensure a successful project process and report, ICF commits to the following expectations.

- Designated Point of Contact: [ACCOUNT MANAGER NAME] (FleetAdvisoryMA@icf.com, 617-218-2100) will serve as ICF's designated point of contact for this project.
- Overall Project Management Structure: The participant project lead and ICF account manager will work together closely to complete this study. ICF reports directly to National Grid, and the participant may contact National Grid staff person, Sejal Shah (Sejal.Shah@nationalgrid.com), with questions or concerns at any time.
- Program Resources: ICF will provide [FLEET NAME] with the resources necessary to transition to EVs, including:
 - a. An initial fleet assessment report, including all vehicles, light-, medium-, and heavy- duty, fit for electrification during the fleet's next replacement cycle, recommended EV alternative for each vehicle eligible for replacement, available incentives for vehicles and chargers, estimated emissions benefits, and

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estimated charging costs and total cost of ownership impacts.

- b. Access to a fleet portal, where a participant can view their report and access additional resources, including Program news and updates, training materials, RFP language, and a calendar of events.
- c. Up to twice per year a fleet assessment report refresh to align with the fleet procurement cycle or new EV model releases.
- Quarterly newsletters featuring information on incentives or vehicles, success stories, and other educational information.
- e. Technical assistance, as needed, to overcome potential challenges to EV deployment, including procurement, charger installation, and driver and maintenance staff training. ICF anticipates no more than 10 hours of technical assistance per participant per year, additional assistance is at the discretion of ICF and National Grid. In addition, when you have made your vehicle choice, National Grid can provide a location-specific EV charging station site assessment for infrastructure and costs.
- Communication with National Grid: ICF will keep National Grid staff apprised of project status and address questions or issues promptly.
- Project Timeline: ICF will update the project timeline above and share it with National Grid and the participant, as necessary.
- 6. Data Privacy: Fleet data will be kept private between ICF and National Grid. It will be used internally only to conduct analysis and track Program impacts. It will not be shared or sold with any outside parties. As discussed above, the fleet assessment reports developed by the Program can, however, be shared publicly.

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Title

E-Mail

Name of Project Lead

Phone

Date

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APPENDIX C: 2022 Newsletters

Q1-2022

nationalgrid

MA Fleet Advisory Services Program

Accelerate to an Electric Fleet

News and updates to help your fleet transition to electric vehicles (EVs)

We're With You Every Step of the Way

Join public fleets across Massachusetts that are switching to EVs. Our <u>MA Fleet</u> <u>Advisory Services Program</u> offers technical assistance for enrolled fleets through 2024. Request your <u>free, customized fleet analysis</u> to help make the transition today.

melrose Makes a Commitment to Electrification

Just months after the City of Melrose joined the <u>MA Fleet Advisory Services</u> <u>Program</u> in May 2021, it ordered an all-electric <u>Ford Mustang Mach-E</u> for its police chief. For easy charging, Melrose is using Massachusetts Department of Environmental Protection MassEVIP incentives to install a dual-head Level 2 charger at the police station garage. This project follows the successful installation of <u>15 public Level 2 chargers on utility poles</u> across the City.

Electrify your fleet. Contact us today at 1-617-218-2100 or FleetAdvisoryMA@icf.com.

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🚓 Stay Up to Date

The latest news about EVs and fleets:

Operational Services Division Updates Statewide Contract VEH110 for Light and Medium Duty Vehicles, Commonwealth of Massachusetts

Biden Administration Releases Bipartisan Infrastructure Law Guidebook for State, Local, Tribal and Territorial Governments, The White House

President Biden Signs Executive Order Catalyzing America's Clean Energy Economy Through Federal Sustainability, The White House

22 of the Most Anticipated Electric Vehicles Coming in 2022, Electrek

In Model Year 2021 the Electric Vehicle with the Longest Range Reached 405 Miles on a Single Charge, U.S. Department of Energy

Utilities Are Essential to Fleets' EV Infrastructure Plan, Work Truck Online

Arlington Awarded EPA Grant for Electric School Buses, Town of Arlington

EV-to-EV Charging: F-150 Lightning and Ionig 5 Both Do It and Here's How, Green Car Reports

2024 Chevrolet Silverado EV Revealed with 664 HP, 400-Mile Range, Car and Driver

Technical Assistance Spotlight: Frequently Asked Questions

Q: How will National Grid manage the grid impacts from increased adoption of EVs?

The <u>MA Fleet Advisory Services Program</u> is designed so that National Grid is prepared for large-scale EV deployment. With insights on transportation electrification from fleet customers, National Grid will provide the services needed for individual and regional fleets. National Grid also has rolled out the <u>EV Off-Peak Charging Program</u> and <u>ConnectedSolutions EV Demand</u> <u>Response</u> to provide incentives for customers to charge their EVs at off-peak times.

More generally, widespread electrification can increase utility system effectiveness with improved load factors. The more electricity that is used will allow utilities to provide electricity to customers more efficiently and costeffectively.

Q: Can EVs handle the police patrol and pursuit vehicle duty cycle, and can they be upfitted with police equipment?

23--5/15/23



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MA Fleet Advisory Services Program

Accelerate to an Electric Fleet

News and updates to help your fleet transition to electric vehicles (EVs)



High gas prices make now the perfect time to electrify your vehicle fleet. Join other public fleets across Massachusetts that are switching to EVs with help from our MA Fleet Advisory Services Program. Request your free, customized fleet analysis today.

Electrification Efforts Increase Across Massachusetts

The City of Salem recently received its first <u>MA Fleet Advisory Services Program</u> assessment report and plans are underway for EVs. In fact, the City committed to transition its entire light-duty fleet to zero emission vehicles by 2030. To aid in the effort, a <u>city ordinance</u> now requires that all new city-owned buildings and new or renovated city-owned parking lots with more than 25 parking spaces must include EV charging stations.

Other Massachusetts cities enrolled in the MA Fleet Advisory Services Program are also making moves toward electrification. The City of Newburyport recently <u>purchased a Tesla Model Y</u> for its Police Department shift supervisors. The U.S.

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Stay Up to Date

The latest news about EVs and fleets:

Electrified Vehicles Interest Sets Another Record, Goes Mainstream, Government Fleet

American Lung Association Says EVs Save Lives, CleanTechnica

Atlis XT Is a Dark Horse Contender for the Best Electric Truck, MotorBiscuit

Note: Atlis confirmed that the XT will be snowplow capable!

Hyundai's Ioniq 5 Nods to Past While Pushing Toward E.V. Future, The New York Times (Free login required)

Boston to Replace School Buses With Electric Ones by 2030, AP News

MBTA Embraces Diesel-Electric Buses on Way to Full-Electric Future, WBUR

Antelope Valley Transit Authority Becomes First All-Electric Transit Agency in North America, Electrek

Explore Funding Opportunities

Financial incentives can help offset the costs of electrifying your fleet. With funding, more than one third of MA public fleet vehicles are cheaper to replace with an EV than a conventional vehicle. Learn more about new, updated, and upcoming funding opportunities for EVs and EV charging:

 The U.S. EPA will soon begin accepting applications for the Clean School Bus program. Awards will cover up to 100% of the cost of a replacement bus and charging infrastructure, and may be issued through grants,



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MA Fleet Advisory Services Program

Accelerate to an Electric Fleet

News and updates to help your fleet transition to electric vehicles (EVs)



Now Is the Perfect Time to Go Electric

With today's gas prices, it's a great time to electrify your vehicle fleet. Join other public fleets across Massachusetts that are switching to EVs with assistance from the MA Fleet Advisory Services Program. Don't miss out! Request your free, customized fleet analysis today.

👼 Municipalities Share Greenhouse Gas Emission Plans

The City of Melrose recently released news on its <u>Net Zero Action Plan</u> to reduce local greenhouse gas emissions by the year 2050. The fleet policy now requires all non-exempt vehicle procurements to prioritize battery-electric vehicles (BEV). If a BEV is not commercially available or cost-effective, departments can consider plug-in hybrids, hybrid-electric, and standard internal combustion engine vehicles. Melrose will continue to work with the National Grid MA Fleet Advisory Services Program to help identify cost-effective vehicle purchases as it transitions its fleet to electric.

The City of Methuen approved the purchase of a Ford 150 Lightning BEV, while

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the City of Worcester has installed two dual port level two stations for municipal fleet charging. It also has a contract for nine additional dual port stations – three at each of the three municipal garages. The Town of Millbury was awarded a MassEVIP grant to install two Direct Current Fast Chargers (DCFC) in a municipal parking lot.

Don't miss your opportunity to participate. Contact us today at 1-617-218-2100 or <u>FleetAdvisoryMA@icf.com</u>.

Already enrolled? You are eligible for a report refresh. We have added hundreds of EVs to our model library and can provide you with an updated analysis. Contact us today at 1-617-218-2100 or <u>FleetAdvisoryMA@icf.com</u>.

🖉 Stay Up to Date

The latest news about EVs and fleets:

<u>Changes to Fuel-Efficient Vehicle Policy</u>, Massachusetts Department of Energy Resources Green Communities Division

EV Sales Hit Record High in Q2 2022, Fleet Forward

Tesla Purchases Pay Off Three Years Later for Indiana PD, Government Fleet

F-150 Lightning Update: One Year Later, Answers To 4 Big Questions, CleanTechnica

Most electric cars are cheaper to own from day one - report, Electrek

Boston Electrifies School Bus Fleet, Launches EV Tech Training Program, School Bus Fleet

Inflation Reduction Act (IRA) Unlocks Billions of EV Funding

Inflation Reduction Act (IRA) passed in the House on Friday, August 12th 2022 including \$105.8 billion in EV funding with \$51 billion in tax credits. The full breakdown can be located <u>here</u>.

- \$3,750 if the battery is constructed with critical materials extracted in the U.S. or a country the U.S. has a free trade agreement with or recycled in North America
- \$3,750 if the vehicle is made with a battery manufactured or assembled in the U.S.
- Additionally, the \$97 billion in the IRA that could support transportation electrification beyond the clean vehicle tax credit include \$3 billion for USPS to electrify and \$1 billion for clean heavy-duty vehicles with other opportunities for funding. Research additional opportunities <u>here</u>.

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Focus on Funding Opportunities

EVs can be more expensive than conventional vehicles, but incentives offset this cost. When taking this funding into account, more than a third of MA public fleet vehicles are cheaper to replace with an EV than a conventional vehicle. Here are new, updated, and upcoming EV and EV-charging funding opportunities

- MassDEP has announced a new funding opportunity for private, public, and non-profit entities to replace eligible diesel vehicles and equipment with zero emission technologies. Through the federal Diesel Emissions Reduction Act (DERA) program, Massachusetts is accepting competitive electric-only grant applications until August 24, 2022. Learn more.
- MassDEP's MassEVIP Fleet Charging Program is a rolling grant program that recently announced \$13M for 300 EV charging stations around the state. The rolling grant program also has funding available to cover up to 60% of the cost up to \$50,000 per station for hardware and installation costs. Lear more.

Fleets participating in the MA Fleet Advisory Services Program get access to more resources about transitioning to EVs through our <u>free portal</u>. Contact us today to enroll in the program and get your login!



Q4-2022

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MA Fleet Advisory Services Program

Accelerate to an Electric Fleet

News and updates to help your fleet transition to electric vehicles (EVs)



Don't Miss This Opportunity to Go Electric

With only a few spots left to join the program, don't wait, and inquire now! <u>Request your free, customized fleet analysis today</u> or contact us at 1-617-218-2100 or <u>FleetAdvisoryMA@icf.com</u>. Don't miss out!

5 Universities Commit to Electrification

The UMass Chan Medical School recently received their <u>MA Fleet Advisory</u> <u>Services Program</u> report and plans to electrify are underway. Staff at UMass Chan are using the report to develop presentations that demonstrate the University's carbon footprint. Through the analysis, the University identified opportunities to work with several departments to reduce fleet emissions. Using this information, UMass Chan Medical School is exploring options to purchase an all-electric Ford Mustang Mach-E and a <u>Chevy Bolt EUV</u> to help reduce their overall GHG emissions and kick off electrification efforts within various departments.

Additional universities are making efforts toward electrification. Bridgewater State University recently purchased two plug-in hybrid <u>Ford Escapes</u> and with 12 level 2 chargers already on campus, BSU is looking to install additional ports at their Operations Center and Vehicle Maintenance Garage. UMass Lowell is investigating installing level 2 chargers at multiple locations on campus.

Already enrolled? You are eligible for a report refresh. We have added hundreds of EVs to our model library and can provide you with an updated analysis. Contact us today at 1-617-218-2100 or <u>EleetAdvisoryMA@icf.com</u>.

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📣 Stay Up to Date

The latest news about EVs and fleets:

Electric School Buses Could Be "Mobile Batteries" During Blackouts, Clean Technica

Awarded Clean School Bus Program Rebates, U.S. Environmental Protection Agency

Arizona Fire Departments Secure Contract for Electric Pumper, Government Fleet

Used-Vehicle Market Stabilizes Supply, Prices, Government Fleet

Minnesota State Begins Training Hybrid & Electric Car Technicians, Clean Technica

State Roundup: The Northeast leads with bold EV Action, Atlas EV Hub

Bestselling EV trucks in 2022 and what models you can look forward to next, Electrek

Questions About IRA Benefits? Rewiring America Has The Answers, Clean Technica

2022 Clean School Bus Rebate Award Winners Announced!

The <u>EPA Clean School Bus Program</u> has recently released the 2022 award winners! Nearly 400 applicants in all 50 states were selected to support the purchase of 2,400 buses, 95% of these buses are electric. The EPA received nearly 2,000 applications requesting around \$4 billion for over 12,000 buses. In the upcoming weeks, the agency plans to select additional recipients to reach the full \$965 million in funding.

Five organizations were selected in Massachusetts to receive funding. The City of Fall River, currently involved in the National Grid MA FASP program, was awarded funding for 11 electric buses! The City of Lawrence and the Lower Pioneer Valley Educational Collaborative, located in National Grid electric service territory, were also awarded funding for 50 electric buses (25 buses each). See the embedded link for the full list of 2022 award winners!

Technical Assistance Spotlight: Frequently Asked Questions

Q: What is the process for planning and installing charging infrastructure?

Planning for EVSE infrastructure can be a daunting t is imperative to first und rstand how much budget your organizatble of dedicating to electric vehicle in rastructure. Knowing the finan with your fleet assessment report, will provi e insight into the numbes of chargers you intend to install across your organ zation. When general idea of your needs, reach out to your ICF Account Manager the number, type, and locations of the charging stations you hop II. Nat ional Grid will provide a basic capacity analysis to determine if the utility can deliver the power necessary for the charger's max kW output.

While you work with National Grid through the capacity analysis, work with an electrician to understand your electrical panel service. Your electrician will help determine whether:

- Your panel's existing electrical service is sufficient, no upgrades are needed
- Your existing electrical service needs to be upgraded

 You need new service at the location of charger installation Your electrician will determine whether a National Grid work order is required and will assist in submitting the request and moving your organization through the process.

Note that National Grid's infrastructure responsibilities include "to-the-meter" upgrades: utility distribution network --> utility pad-mounted transformer --> the meter. Your organization's responsibility includes "behind-the-meter" upgrades: The meter --> electrical panel --> EV charging station.



Fleets participating in the MA Fleet Advisory Services Program get access to more resources about transitioning to EVs through our <u>free portal</u>. Contact us today to enroll in the program and get your login!

Have questions or need expert support? Contact us today:

(2) 1-617-218-2100

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Fleet advisory

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Participant	Enrollment Year	Category	EJ Status ²	Fleet Expectations Doc Signed Date	Report Delivery Date
Town of Auburn	2021	Municipality	I	8/9/2021	1/7/2022
Town of North Andover	2021	Municipality	М	8/26/2021	2/17/2022
City of Attleboro	2022	Municipality	MI	9/8/2021	1/18/2022
City of Salem	2022	Municipality	MIE	9/10/2021	2/11/2022
Town of Topsfield	2022	Municipality		9/20/2021	1/6/2022
Lowell Regional Transit Agency	2022	Transit	MIE	9/21/2021	2/28/2022
Merrimack Valley Regional Transit Authority	2022	Transit	МІ	9/28/2021	2/28/2022
City of Fall River	2022	Municipality	MIE	10/14/2021	4/8/2022
City of North Adams	2022	Municipality	I	10/18/2021	2/28/2022
University of Massachusetts Medical School, Worcester	2022	University/College	MIE	10/28/2021	5/3/2022
Town of Ayer	2022	Municipality	М	11/1/2021	4/6/2022
Town of Bolton	2022	Municipality		11/10/2021	3/7/2022
Town of Williamstown	2022	Municipality	МІ	11/15/2021	3/8/2022
Town of Sturbridge	2022	Municipality		11/22/2021	4/20/2022
Town of Westford	2022	Municipality	М	12/8/2021	4/26/2022
Bridgewater State University	2022	University/College	MI	1/27/2022	5/20/2022

APPENDIX D: FASP Participant and Enrollment Information

² *E=English Isolation, I=Income, M=Minority

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Participant	Enrollment Year	Category	EJ Status ²	Fleet Expectations Doc Signed Date	Report Delivery Date
City of Franklin	2022	Municipality	МІ	2/2/2022	7/31/2022
Town of Westborough	2022	Municipality	М	1/6/2022	7/5/2022
Town of Abington	2022	Municipality	М	2/16/2022	11/23/2022
Town of Manchester-by- the-Sea	2022	Municipality		2/24/2022	11/22/2022
Bristol Community College	2022	University/College	MIE	2/17/2022	7/8/2022
City of Marlborough	2022	Municipality		2/10/2022	5/26/2022
Quinsigamond Community College	2022	University/College	MIE	3/23/2022	7/29/2022
North Shore Community College	2022	University/College	MIE	3/9/2022	9/26/2022
Montachusett Regional Transit Authority	2022	Transit	MI	5/2/2022	11/3/2022
Town of Charlton	2022	Municipality	I	5/23/2022	12/9/2022
Town of Harvard	2022	Municipality	М	5/20/2022	10/10/2022
Town of Easton	2022	Municipality	М	5/26/2022	10/14/2022
Town of Adams	2022	Municipality	I	6/24/2022	11/29/2022
Town of Egremont	2022	Municipality		6/30/2022	12/6/2022
Town of Cohasset	2022	Municipality		6/22/2022	3/15/2023
Town of Hampden	2022	Municipality		7/5/2022	12/6/2022
Pioneer Valley Transit Authority	2022	Transit	МІ	7/26/2022	1/27/2023
Town of Swampscott	2022	Municipality	М	7/20/2022	1/23/2023

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Participant	Enrollment Year	Category	EJ Status ²	Fleet Expectations Doc Signed Date	Report Delivery Date
Worcester State University	2022	University/College	MIE	6/28/2022	11/3/2022
Town of Amesbury	2022	Municipality	1	8/8/2022	In Progress
Town of Billerica	2022	Municipality	М	8/29/2022	In Progress
Town of Athol	2022	Municipality	MI	8/31/2022	1/4/2023
Town of Ware	2022	Municipality	МІ	9/6/2022	In Progress
Massachusetts College of Liberal Arts	2022	University/College	МІ	9/9/2022	In Progress
Town of Essex	2022	Municipality		9/13/2022	3/1/2023
Town of Hamilton	2022	Municipality	MI	9/20/2022	2/14/2023
Town of Sheffield	2022	Municipality		9/22/2022	In Progress
City of Everett	2022	Municipality	MIE	9/29/2022	In Progress
Town of Uxbridge	2022	Municipality		10/4/2022	1/30/2023
Town of Wenham	2022	Municipality		10/5/2022	In Progress
Southeastern Regional Transit Authority	2022	Transit	MIE	10/6/2022	In Progress
Town of East Bridgewater	2022	Municipality	М	10/12/2022	In Progress
Town of Newbury	2022	Municipality		10/13/2022	In Progress
City of Gloucester	2022	Municipality	MI	10/13/2022	In Progress
Town of Monterev	2022	Municipality		10/19/2022	In Progress
City of Brockton	2022	Municipality	MIE	10/26/2022	In Progress
City of Nantucket	2022	Municipality	М	10/26/2022	In Progress

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Participant	Enrollment Year	Category	EJ Status ²	Fleet Expectations Doc Signed Date	Report Delivery Date
Town of Grafton	2022	Municipality	М	10/31/2022	In Progress
Town of Tyngsborough	2022	Municipality	М	10/31/2022	In Progress
Town of West Bridgewater	2022	Municipality		10/31/2022	In Progress
Town of Royalston	2022	Municipality		11/1/2022	In Progress
City of Lynn	2022	Municipality	MIE	11/3/2022	In Progress
Town of Whitman	2022	Municipality	I	11/10/2022	In Progress
Town of Stockbridge	2022	Municipality		11/16/2022	In Progress
Town of Tewksbury	2022	Municipality		11/17/2022	In Progress
City of Lawrence	2022	Municipality	MIE	12/6/2022	In Progress
Town of Shutesbury	2022	Municipality		12/14/2022	In Progress

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APPENDIX E – FASP Converted Fleet Performance Incentive

A "Converted Fleet" is defined as an FASP participant accumulating a minimum of 10 points worth of actions as detailed in the key performance metric categories below. ICF is eligible to earn an incentive of \$3,625 when an FASP participant earns 10 or more points. For a given FASP participant, points can only be earned once for a single category (e.g. max of 6 points for 'External Engagement').

The Converted Fleet reward budget equals 75% of \$145,000 (\$108,750), for up to 30 FASP participants that achieve or exceed the 10 point threshold. In 2022, 4 FASP participants reached or exceeded the threshold, earning ICF a performance incentive of \$14,500 (\$3,624 X 4) as summarized in Table 7 below.

Performance Metric			
Referral : Participant refers other eligible fleets to the program ³			
Written Commitment: Participant signs a letter of commitment to deploy EVs ⁴			
Internal EV Planning: Participant 1) includes EVs in municipal or organizational budget planning, 2) incorporates EVs into their replacement schedule, or 3) adds EV specification to their procurement documentation (e.g. internal strategy)			
External Engagement : Participant 1) initiates a group buy for EVs or engages a dealership directly, 2) issues an RFP or lease agreement for EVs, 3) submits an application to the MassDEP's MassEVIP, Federal Transit Administration's Low- or No-Emission Grant program, the state's Volkswagen funding, or another incentive program for an EV, or 4) makes a public statement showing commitment to electric transportation			
Infrastructure : Participant installs a charging station at the fleet garage/depot site in preparation for EVs ⁵			
EV Purchase: Participant orders EV for deployment in their public fleet ⁶			

Table 6: Converted Fleet Key Performance Metrics

³ Confirmed through participant feedback, discussion, or survey. Referred fleet must go through intake and become an active participant in the program to be eligible for incentive credit

⁴ Non-binding letter of commitment.

⁵ Operational Charging station; may be included in the AFDC Station Locator, but not required

⁶ "Orders" includes purchases, leases (including long-term leases), and vehicles included in an executed service contract of battery electric and plug-in hybrid vehicles.

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Participant	Success Categories	Points Earned	Performance Metrics/Outcomes
VA Boston Healthcare System	Written Commitment Internal EV Planning External Engagement	16	Requested additional EVs from U.S. General Services Administration (GSA); budgeted \$600,000 for EVs and EVSE; currently installing 15 Level 2 chargers; commitment to purchase 25 EVs
City of Melrose	Internal EV Planning External Engagement Purchase	22	The FASP process resulted in more department heads submitting capital requests for EVs in the current 5-year capital planning program; purchased a Ford Mustang MachE for the police; accepted a MassEVIP grant for 2 chargers for the police; Released public statement to purchase EVs & PHEVs first.
Town of Newburyport	Purchase	10	Purchase of a Tesla Model Y for police department
City of Worcester	External Engagement Infrastructure	14	Installed 2 dual ports for the municipal fleet. Currently have a bid out for 9 dual port stations, 3 at each of the 3 municipal garages

Table 7: 2022 FASP Participants Achieving "Converted Fleet" Performance Metric Threshold