



CAC Item C5
Staff Report Item 16

To:	Ava Community Energy Authority
From:	Brett Wiley, Program Manager
Subject:	Authorizing CEO to negotiate and execute an Amendment to the Consulting Services Agreement with Aptim to extend and expand the Ava Bike Electric Program
Date:	July 15, 2026

Summary/Recommendation

Adopt a Resolution authorizing the Chief Executive Officer to negotiate and execute an Amendment to the Consulting Services Agreement (“CSA”) with Aptim to extend the Ava Bike Electric Program through 2027.

Financial Impact

Increases the not to exceed (“NTE”) for the CSA by \$2,000,000, for a total NTE of \$12,000,000. The initial program funding consists of \$6,000,000 from Ava and \$4,000,000 from a grant by the Alameda County Transportation Commission, and the initial program funding is expected to be fully utilized by December 2026. The additional funding of \$2,000,000 will utilize Board-approved but unspent and uncommitted Vehicle Electrification program funds, which currently total \$3.6 million.

Analysis and Context

The Ava Bike Electric Program (“Ava Bike Electric” or “Program”) smooths the path to shift commutes, errands, outings, and recreation to clean electric transportation without increasing road congestion. Ava’s Program is the largest e-bike program in the U.S., along with the City of Portland. Since launching last July, it has been Ava’s most popular program in agency history with over 26,000 eligible applicants and 5,783 e-bikes purchased as of May 2026.

Program interest has been rising with the past 4 months having more than 2x the number of applicants (avg ~3,500/month) compared to Aug 2025 to Feb 2026 (avg ~1700/month). Ava co-hosted an e-bike test and ride event on June 27 attended by 500+, exceeding expectations. Program interest and rebate redemption are throughout Ava’s service area. Participation is fairly proportional to the percentage of residential accounts in most jurisdictions served by Ava in Alameda County. There is growing participation within our four San Joaquin County jurisdictions, aided by Ava’s targeted marketing efforts, as evidenced by over 1,800 applicants and over 330 rebate redemptions but has lagged behind Alameda County likely due to differences in biking access from more sparse biking infrastructure and far fewer local businesses that sell e-bikes.

Ava Bike Electric educates and engages our community on e-bikes and biking with local partners. Participants 18 years and older apply to be entered in a random selection for a rebate that can be used at point-of-sale at one of our local, participating brick-and-mortar bike shops in Alameda and San Joaquin counties. All eligible e-bikes meet industry standards, have UL certified batteries, and require pedal assistance. E-motorcycles are not allowed in the Program. Income-qualified customers (e.g. residents living in a household on Ava’s CARE or FERA rate) receive at least 40% of the incentive budget, get a larger e-bike rebate as well as a safety equipment rebate to be used on helmets, locks, & lights. 86% of the Program budget goes directly to customers through incentives through e-bike & safety equipment rebates. Rebates typically don’t cover the full cost of the e-bike, and even when they do, the participant still must pay sales tax. Ava sends a survey 30 days after someone gets their e-bike, and also surveys participants who do not redeem their rebate to understand and improve Program participation and satisfaction.

The additional proposed funding would mean an estimated 1,600 new e-bikes purchased by participants – 656 of those from income qualified participants - while keeping all existing program rules and assumptions the same.

The Program has increased affordability and access to clean, electric transportation, as 96% of surveyed participants said the rebate was the primary reason they bought an e-bike. The Program is making e-bikes more accessible and reducing upfront costs for participants while also investing in local businesses. Every \$1 in rebates redeemed by a participant has resulted in \$1.71 in new sales for 31 local, brick-and-mortar bike shops, which in turn contribute to local tax revenue.

After the first month with their new e-bike, participants were averaging 58 miles of biking, while 62% reported driving less and 89% biking more. The Program has shown a high impact in mode

shift, reducing Vehicle Miles Traveled, and increasing equitable access to active transportation, directly contributing to our local jurisdictions' Climate Action Plans (CAPs)¹, while bridging delivery gaps noted in those CAPs with a scaled solution and measurable outcomes.

The Program has also elevated Ava's brand awareness and customer satisfaction. The Program webpages represent 3 of the top 4 most visited pages on Ava's website, with 83,800 new users visiting Ava's website since launch. During that same time, Ava's customer satisfaction scores have increased from 62% to 73%, while not entirely from Ava Bike Electric, 65% of all positive sentiments are directly attributed to the Program.

Ava Bike Electric is currently on track to end in December 2026 as planned. Ava is currently developing a customer programs roadmap, which is underway and will not be completed by December 2026. Extending Ava Bike Electric continues a popular program and advances the transition to clean electric mobility options for our customers. A 12-month extension is a short-term bridge to meet ongoing & rising Program demand in parallel with completion of the customer programs roadmap to strategically research, design, & plan our transportation electrification programs beyond 2027.

This extension will add time to the Program so that the team can coordinate a thoughtful wind-down in partnership with participating bike shops so that the end of the Program and associated reduction in sales do not negatively impact participating bike shops.

Funding Request and Budget Source:

There is flexibility in the budget allocated for this Program extension. Staff recommends adding \$2 million to the Program, as this would allow the Program to extend for an additional year at a lower but reasonable run rate that responds to applicant demand and that local bike shops can easily support while supporting them with a longer window to stabilize their businesses before the program winds down. The proposed \$2M extension would generate approximately \$3.4M in additional revenue to local bike shops, supporting local jobs. If Ava is to increase funding, the minimum recommended budget is \$1.5 million, since administrative fees would increase if the budget fell below this amount, thereby reducing the value delivered directly to customers. Alternatively, the Board could authorize additional funding, with staff recommending a cap of \$3 million based on the available Vehicle Electrification funds.

Ava has over \$83 million allocated to the Local Development fund, as reported to the Board at the Board meeting on June 17, 2026. Staff recommends using \$2M of the un-earmarked vehicle electrification balance of \$3.6 million to extend the Bike Electric Program. This proposal would not draw funding from other categories, like Building Electrification, that Ava plans to utilize to support heat pump water heater market development. We recognize that there are many ways Ava could use these approved yet un-earmarked funds towards vehicle electrification Programs.

¹ Analysis derived from Berkeley, Hayward, Dublin, Oakland, San Joaquin County, San Leandro, Union City, Pleasanton, & Fremont CAPs. Each CAP calls for mode shift, reduced driving, increased biking, & equitable access.

However, staff capacity is limited over the next year to develop and launch new initiatives, which will also require direction from the customer programs roadmap that is under development. Therefore, staff proposes to continue this existing, successful program while we develop the customer programs roadmap.

Draft Budget: Local Development Fund Balance*

	Program Area	Balance	Earmarked
	Local Development	\$2,800,000	\$2,600,000
BE+EE	Building Electrification	\$14,600,000	\$8,500,000
	Building Efficiency Accelerator	\$1,300,000	\$1,000,000
TE	Vehicle Electrification	\$8,100,000	\$4,500,000
	Ava Charge	\$15,900,000	\$15,900,000
	Bike Electric	\$2,200,000	\$2,200,000
	SmartHome Charging	\$5,700,000	\$1,700,000
Resilience	Critical Municipal Facilities (CMF)	\$5,800,000	\$5,800,000
	SmartHome Battery	\$10,900,000	\$10,900,000
	Resiliency Hubs	\$5,600,000	\$5,600,000
BE+TE	Virtual Power Plant DERMS Platform	\$1,900,000	\$1,900,000
Grants	Community Investment Grants	\$8,800,000	\$8,800,000
	Total	\$83,600,000	\$69,400,000

[Local Development Fund Reconciliation Board Item from March 2025](#)

*Fund balance as of 1/31/26

Attachments

- A. Resolution of the Board of Directors of Ava Community Energy Authority
Authorizing the CEO to Negotiate and Execute an Amendment to the Consulting
Services Agreement with Aptim for the Ava Bike Electric Program
- B. Consulting Services Agreement Amendment
- C. Presentation

RESOLUTION NO. R-2026-XX
A RESOLUTION OF THE BOARD OF DIRECTORS
OF AVA COMMUNITY ENERGY AUTHORITY AUTHORIZING THE CEO TO
NEGOTIATE AND EXECUTE AN AMENDMENT TO THE CONSULTING SERVICES
AGREEMENT WITH APTIM FOR THE AVA BIKE ELECTRIC PROGRAM

WHEREAS Ava Community Energy Authority (“Ava”) was formed as a community choice aggregation agency (“CCA”) on December 1, 2016, under the Joint Exercise of Powers Act, California Government Code sections 6500 *et seq.*, among the County of Alameda, and the Cities of Albany, Berkeley, Dublin, Emeryville, Fremont, Hayward, Livermore, Piedmont, Oakland, San Leandro, and Union City to study, promote, develop, conduct, operate, and manage energy-related climate change programs in all of the member jurisdictions. The cities of Newark and Pleasanton, located in Alameda County, along with the City of Tracy, located in San Joaquin County, were added as members of Ava and parties to the Joint Powers Agreement (“JPA”) in March of 2020. The city of Stockton was added as a member to Ava in September of 2022. The city of Lathrop was added as a member to Ava in October of 2023. San Joaquin County was added as a member to Ava in July 2024. On October 24, 2023, Ava legally adopted the name Ava Community Energy Authority, where it had previously used the name East Bay Community Energy Authority since its inception; and

WHEREAS Ava seeks to support the adoption of electric bikes (e-bikes) across its service area to reduce vehicle miles traveled, greenhouse gas, and particulate emissions that disproportionately impact lower income and disadvantaged communities; and

WHEREAS Ava and Aptim entered into a Consulting Services Agreement dated July 26, 2024 (“Agreement”) to implement the Ava Bike Electric Program (“Program”) and increase e-bike usage and adoption in Ava’s service area; and

WHEREAS the Program is an incentive program that provides instant rebates to help Ava customers purchase new electric bicycles from local bike shops; and

WHEREAS the Program launched on July 8, 2025 and has been Ava's most demanded program, with over 26,000 eligible applicants and 5,783 new e-bikes purchased with 29 currently participating brick and mortar bike shops in Alameda and San Joaquin counties as of May 2026; and

WHEREAS the Program was scheduled to end in December 2026; and

WHEREAS Ava desires to extend the Agreement through December 2027 to continue to support Program demand and minimize economic impact to participating bike shops; and

WHEREAS Ava and Aptim desire to update the scope of services and increase the Agreement by an amount not to exceed \$2,000,000 for a total not-to-exceed amount of \$12,000,000.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF AVA COMMUNITY ENERGY AUTHORITY DOES HEREBY RESOLVE AS FOLLOWS:

Section 1. The Chief Executive Officer, in consultation with staff and legal counsel, is hereby authorized to negotiate and execute an amendment to the Consulting Services Agreement to extend the term through December 31, 2027, update the scope of services, and increase the not-to-exceed amount by \$2,000,000 for a total not-to-exceed amount of \$12,000,000.

ADOPTED AND APPROVED this 15th of July, 2026.

Betsy Andersen, Chair

ATTEST:

Adrian Bankhead, Clerk of the Board

June 2026 Amendment to the Consulting Services Agreement

Ava Community Energy Authority	Signature:	
	By:	
	Date:	
	Approval as to Form:	
	Address:	1999 Harrison Street, Suite 2300 Oakland, CA 94612
	Notice Emails (all are required):	bwiley@avaenergy.org legal@avaenergy.org
Aptim Environmental & Infrastructure, LLC	Signature:	
	By:	
	Date:	
	Notice Attn:	
	Notice Address:	12000 Brickyard Lane, Suite 202, Baton Rouge, Louisiana 70802, United States
	Notice Email:	
Agreement	Consulting Services Agreement for Services By and Between Ava Community Energy Authority and Aptim Environmental & Infrastructure, LLC originally effective as of July 26, 2024	

May 2026 template.

This Amendment to the Agreement ("June 2026 Amendment") is made by and between Ava Community Energy Authority, a Joint Powers Agency formed under the laws of the State of California ("Ava") and Aptim Environmental & Infrastructure, LLC ("Consultant") as of the date executed by Ava (the "Effective Date," above), for the purposes of amending the Agreement as set forth below.

Recitals

- I. Ava and Consultant entered into that certain Consulting Services Agreement for Services By and Between Ava Community Energy Authority and Aptim Environmental & Infrastructure, LLC dated July 26, 2024 ("Agreement"), in which the parties agreed that compensation would not exceed \$10,000,000; and
- II. Ava and Consultant now desire to amend the Agreement to add additional compensation, increasing the not-to-exceed amount by \$2,000,000, to update the scope of services, and to extend the term.
- III. Ava and Consultant wish to amend the Agreement as set forth below.

Now therefore, for good and valuable consideration, the amount and sufficiency of which is hereby acknowledged, the Parties agree as follows:

1. Subsection 3.4 is added to Section 3 of the Agreement (“Scope of Work/Compliance with Laws and Regulations”) to read as follows: “Consultant further represents and warrants that, to the best of the Consultant’s knowledge upon reasonable diligence, the Consultant has not contracted to provide Data Brokerage or Extreme Vetting services to the United States Immigration and Customs Authority since January 2025. Consultant agrees not to provide such services during the Term of the Agreement. For the purposes of this provision, (i) “Data Brokerage” means (A) the collection of information, including information about consumers, from multiple sources for the purpose of reselling that information to private-sector businesses and government agencies; and (B) the aggregation of data that was collected for another purpose from that for which it is ultimately used; and (ii) “Extreme Vetting” means data-mining, threat modeling, predictive risk analysis, or other similar service.”
2. Section 2 of the Agreement (“Term”) is amended to extend the term of the Agreement through December 31, 2027.
3. Section 6.1 of the Agreement (“Compensation and Payment”) is amended in part to increase the total compensation of the Agreement by \$2,000,000 for a total amount not to exceed \$12,000,000.
4. Section 6.2 of the Agreement (“Compensation and Payment”) is amended in part by deleting the reference to “\$8,000,000” and replacing it with “\$9,600,000.”
5. Section 14.7 of the Agreement (“Notices”) is amended in part to include Legal@avaenergy.org as a required additional recipient for Ava and to update Consultant’s contact information to Alex Scott, VP of Energy Transition, Alex.Scott@APTIM.com, and (504) 717-9171.
6. Exhibit A (“Scope of Work”) of the Agreement is replaced in its entirety by Exhibit A, attached hereto.
7. Exhibit E (“Compensation/Budget”) of the Agreement is replaced in its entirety by Exhibit E, attached hereto.
8. All other terms and conditions in the Agreement not otherwise modified by this June 2026 Amendment will remain in full force and effect.

Exhibit A**SCOPE OF WORK****Ava Bike Electric Incentive Program****Task 1: Program Establishment**

CONSULTANT will submit a program design and supporting documentation consistent with our existing, successful e-bike rebate programs. The program design may include, but is not limited to, the following components, with a launch date no later than 120 days after contract execution.

- A. **Kick-off meeting.** CONSULTANT will facilitate a kickoff meeting to establish the plan and schedule for pre-launch activities. The meeting will include the following:
 - a. **Review communication and project management approach.** This will include meeting cadence, decision making, documentation, collaboration, and communication approaches.
 - b. **Schedule overview and major milestones.** This will include a high-level, draft schedule, highlighting critical path decision, approval and deliverable dates needed to maintain the proposed timeline.
 - c. **Review rebate program process overview.** CONSULTANT will conduct a live portal demo that illustrates the core portal design configured for Ava. The demo will review the workflow of applicants and bike retailers through the portal as well as report templates that will be available to Ava and expectations for the necessary application software interface (API) to send and receive data from Ava's system. The purpose of this review will be to determine if there are any gaps or roadblocks for Ava related to the core portal design for follow up and ensure that both parties have the same expectations for data exchanges. This is a critical step since changes to the core portal design that require new coding or workflow changes will impact the proposed launch timeline and require a change order and level of effort determination.
 - d. **Introduce configuration playbook.** The playbook is used to document recommendations and approved decisions for all necessary program design attributes. The attributes to be reviewed and defined include all portal attributes related to the portal experience, workflow and rules.

The goal of the playbook exercise and documentation is to define the program such that design documentation and development may proceed in a timely manner. To manage change control and maintain program schedule, approved decisions within the playbook will be considered final.

Changes to previously approved decisions or requested design attributes that require significant solution engineering may lead to a change control process where scope, schedule and cost impacts will be reviewed, options considered and agreed upon prior to implementation. CONSULTANT and Ava will work closely and transparently to resolve any such barriers.

B. Finalize program portal configuration. CONSULTANT will work with Ava to review portal configurations, program attributes and data exchanges through the use of APIs. Once Ava approves these configurations, a workflow validation session will review the end-to-end applicant and bike retailer experience for final approval of configurations. Final decisions and approvals will be critical to maintaining the launch schedule. Activities will include:

- a. **Finalize applicant participation rules, product eligibility definitions and recommended terms & conditions (T&Cs).** CONSULTANT will provide these for review and approval by Ava.
 - i. Participant rules will include information for applicants that define key process requirements, timelines for completing a valid application and redeeming a rebate for a qualifying e-bike with a qualified bike retailer.
 - ii. Clear product eligibility definitions of bike types and equipment types eligible for rebates.
 - iii. CONSULTANT will provide a draft of participant terms and conditions for Ava's review and approval of the terms and conditions document that each applicant must electronically sign to participate in the program. CONSULTANT legal will be required to approve any changes suggested by Ava.
 - iv. Update existing Agreements for customers, e-bike manufacturers, and e-bike retailers to account for any changes in the program implementation model (PIM) and their ability to participate in the program
- b. **Finalize bike retailer participation rules, eligibility guidelines and recommended terms & conditions (T&Cs).** CONSULTANT will provide these for review and approval by Ava.
 - i. Bike retailer rules will include information for bike retailers that define qualification requirements, transaction requirements, and timelines for becoming qualified and redeeming a rebate for a qualifying e-bike with an applicant.
 - ii. CONSULTANT will provide bike retailer eligibility guideline recommendations on acceptable documents to qualify for participation, applying definitions provided by Ava. Upon Ava's review and approval, these will be finalized into the program design.

- C. **Engage, contract, and manage relationships with manufacturers and local e-bike retailers.** Engage all publicly known bike shops in Ava's service area on the program with the goal of 22 shops contracted ahead of the launch that reflects the geographic diversity of Ava's service area. Ongoing engagement and contracting with additional bike shops through the duration of the program, including in new member communities ahead of their launch into Ava's service. Ongoing training of retailer staff and evaluating that participating providers are meeting program requirements, including incentive verification and on-site signage, will be conducted.
- D. **Create portal workflow validation.** Once all configuration decisions have been made and approved, CONSULTANT will review and finalize for final approval by Ava. Upon approval, this will be the source document for the implementation of all configurable elements of the portal and operations.
- E. **Validate program design.** We will review the program design to ensure it meets required specifications.
- F. **Provide marketing review and experience-based knowledge to assist Ava's marketing team.** Review and provide suggestions to assist Ava Marketing Team's development of marketing materials for the E-Bike program, leveraging CONSULTANT experience from other successful programs.
- G. **Finalize bike retailer requirements and registration.** CONSULTANT will prepare materials and lead bike retailer recruitment and training, while providing guidance for Ava and other stakeholders to support this effort. Ava may utilize these materials and integrate them into Ava's website's landing page for the program to provide access to the bike retailers.
 - a. **Conduct bike retailer enrollment.** Open and monitor bike retailer enrollments on the portal. Approve or provide feedback to bike retailers upon receipt of their registrations.
 - b. **Develop bike retailer instructions.** Develop clear instructions for bike retailers to access, enter information and use the rebate administration portal in a training presentation in PowerPoint to be uploaded to Ava's website. Additionally, develop a one-page reference document for bike retailers to utilize at the point of purchase to remind them of requirements to complete a rebate redemption properly.
 - c. **Conduct bike retailer webinar.** Deliver one live kick-off webinar presenting the retailer instructions PowerPoint to retailers. This webinar will be recorded and uploaded to Ava's website to provide ongoing access to bike retailers. This webinar will also be provided on the program portal, together with the training presentation. Future webinars will be conducted ahead of the launch of meaningful program changes.

- d. **Create applicant and retailer contact plan.** Advise Ava and other stakeholders on how to recruit approved bike retailers and participants. This will include development of a recommended outreach timeline and email templates to, if necessary, be sent by Ava to retailers.
- H. **Develop and implement automated email participant communications during the customer journey.**
 - a. Provide a participant communications plan for Ava approval aligned with the customer journey to ensure a participant receives key information and reminders at key stages in the journey. CONSULTANT owns all participant communication after a participant is deemed eligible through the second to last stage of a customer journey pathway, while Ava owns participant communication at all other stages.
- I. **Advise Ava's Marketing team about:**
 - a. Transfer relevant knowledge from previous programs to educate Ava marketing team on program communication and marketing best practices, both to drive demand and manage expectations with stakeholders
 - b. Understanding interest and participation volume expectations for marketing campaign deployment that aligns with program goals and bike retailer capacity
 - c. Benchmarks to determine whether marketing channels are performing as intended from peer programs
 - d. Uncovering unique channels to engage potential Ava Bike Electric participants
 - e. As requested, provide feedback on Ava developed marketing material within five (5) business days of receipt
 - f. Marketing acumen that could contribute to performance of marketing activities, conversion rates, and appropriately setting expectations for a high demand program
 - g. Regular meetings (weekly in the two months prior to launch and one per month after. Can be adjusted after this point by mutual agreement) to review and align marketing activities, customer support and feedback, and program performance.
- J. **Update Program Implementation Manual.** CONSULTANT to update the existing PIM to ensure it is consistent with program designs and contains the following information:
 - a. Rules and requirements for program customers, vendors, and other participants. This includes in-store signage and training requirements for participating retail locations.
 - b. Mitigation plans for the unauthorized reselling of e-bikes
 - c. Process for returned incentive funds
 - d. Incentive Program oversubscription and wait lists
 - e. Customer Journey

- f. Customer segmentation analysis
- g. E-bike technical specifications
- h. Qualified Product List (QPL)
- i. Program Participation Agreements and T&Cs
- j. Eligible e-bikes on Qualified Product List (“QPL”) – ongoing updates, especially considering UL standards. Data to be tracked and reported to Ava.
- k. Data Exchange Methods and Protocols (APIs)

Task 2: Configuration of the Rebate Administration Portal

Configure CONSULTANT’s proprietary application system, to match the configuration requirements and funding streams for the program. CONSULTANT assumes this program will make use of pre-configured, existing program layouts, workflows, rules, dashboards, survey tools, design materials, and reporting dashboards; pricing is based upon use of the existing designs, program, and design materials, reporting templates and program parameters.

- A. **Configure the program portal.** Prepare and test an online portal to allow qualified participants to apply for vouchers. The portal will:
 - a. Ensure each budget stream remains within required limits
 - b. Make available a customer portal that’s accessible on a desktop and mobile device (iOS and Android) and create a point-of-sale e-bike incentive that uniquely applies to an eligible participants’ purchase and subsequently redeemed by a bike retailer. Ideally, the incentive would be universally applied to any participating bike shop.
 - c. Allow for follow up if applications are deemed incomplete
 - d. Allow for random selection of participants
 - e. Issue a Standard or California Alternate Rates for Energy (CARE)/Family Electric Rate Assistance Program (FERA) incentive voucher via random selection to purchase a standard, cargo, or adaptive e-bike for purchase at a participating retailer
 - f. Upon approval, email the participant a voucher code to approved participants that can be redeemed at approved e-bike retailers
 - g. Utilize google translate function to offer translations of portal screens to users
 - h. Provide an online mechanism to allow bike retailers to determine if vouchers are active
 - i. Provide an online mechanism to allow retailers to submit voucher redemption requests for payment processing
- B. **Provide program introduction content.** Create landing page content (text and hyperlinks) for program based upon brand requirements on Ava’s website that will direct

residents and approved retailers to CONSULTANT's application portal. Ava will integrate this content into its website.

Task 3: Establish a Customer Service Help Desk

CONSULTANT will establish a dedicated program email address and inbox. CONSULTANT will provide contact center staffing to respond to applicant and bike retailer emails and phone calls.

- A. **Establish contact center email and phone number.** Create a dedicated phone number and email address to assist with applicant and bike retailer questions. Available during participating bike shop hours to reduce the likelihood that contacts will reach a non-response, with available hours as defined below.
- B. **Manage phone and email inquiries.** CONSULTANT will review and respond via phone and email to applicants in a first come-first served basis, with an objective to respond to and resolve applicant and bike retailer questions, issues and/or barriers to participation as quickly as possible per Exhibit E. Customer Service representatives will be available 9am-5pm PST, Monday to Friday and able to handle calls and emails in English, Spanish, and Simplified Chinese.
- C. **Escalate complex email inquiries as needed.** CONSULTANT may escalate customer or bike retailer inquiries to Ava, with recommendations, in cases where the resolution is not clear based on program rules or may require special consideration.
- D. **Direct customer response.** In some cases, if more convenient than email-only communication, CONSULTANT contact center staff may work to resolve customer or bike retailer emails by phone.
- E. **Document process.** Provide Ava with the process to document customer issues, escalations, and resolutions for CONSULTANT to resolve.

Task 4: Rebate Application Processing

CONSULTANT will establish dedicated staff to actively review submitted rebate redemptions from bike retailers (with adequate time to ensure payment within 15 business days). These staff will review and respond to applicants with scripted or customized feedback to assist their progress through the rebate redemption processes. CONSULTANT processing staff will:

- A. **Notifications.** Notify applicants of status once a voucher has been issued.
- B. **Review rebate redemption requests.** Review rebate redemptions submitted by bike retailers to confirm program requirements are met. When requirements are met, notify the bike retailer and process payment to the bike retailer for payment within 15 business days. When requirements are not met, notify the bike retailer and advise on how to meet the requirements within 2 business days.

- C. **Monitor and manage rebate approvals and redemptions.** Continuously assess the number of rebates approved and redeemed to help ensure the budgets are not exceeded or at risk.

Task 5: Rebate Distribution

CONSULTANT will distribute rebate payments to bike retailers in accordance with the approved program design. Tasks will include:

- A. **Issue rebate checks.** Paper rebate checks will be sent to bike retailers. These retailers will have the option to enroll for electronic payment (ACH) for faster receipt of checks. Printed materials, including but not limited to stationery and paper checks related to the Incentive Program shall bear the desired program or Ava's logo, to be provided to CONSULTANT. Use of the logo is limited to the e-bike Incentive Program.
- B. **Issue 1099s.** CONSULTANT will be responsible for issuing 1099s to bike retailers.

Task 6: Reporting and Database

Administer the program, track, and analyze key metrics, and report program budgets and status.

- A. **Conduct ongoing Administration.** Provide ongoing management of the program and coordination with Client in the following:
 - a. Schedule, facilitate, lead, and report out from weekly project management meetings with Ava during the Start Up Phase and no less than bi-weekly project management meetings after the Go Live Date. A draft agenda will be sent no later than 1 business day prior to the meeting and assign next steps no later than 1 business day after meetings in the mutually agreed upon project management software, with a preference for Asana.
 - b. Train all staff in project management software and ensure ongoing and active use for effective program delivery.
 - i. Provide Ava with the ability to access reports and download raw data directly through web-based views of the data tracking. Specific data to be tracked will be mutually decided via email and will be described in the PIM.
- B. **Regularly weekly marketing report of the following to the Client:**
 - a. Email Metrics: including emails sent within Vendor-managed portion of customer journey, open rate, bounce rate, and click-through rates.
 - b. Azure Telemetry/Insights: related to any customer engagement with CONSULTANT's owned/managed program web properties, including: page views, demographics, campaign source, site duration, and bounce rate.
- C. **Establish a monthly report** format and key performance indicators (KPI) with Ava in the PIM to track Program performance, including Program updates, outreach status compared to Response Times, customer Information updates, any customer complaints, feedback, escalations, and Scheduled Uptime (as described in attached SLA), budget

status, milestone activities, risks/issues/resolutions, incentives, and e-bikes delivered, and a line-item invoice. Monthly reports will provide the following, but not limited to, information, including,

- a. Total Incentive budget spent compared to funds allocated to-date
 - b. Total percent of the Incentive Budget spent on CARE/FERA customers, to be measured no sooner than 3 months after Program Launch
 - c. Number of e-bikes delivered to non-CARE/FERA and customers, to be measured immediately upon Program Launch, and then monthly thereafter
 - d. Total number of participants per customer journey stage, zip code, and percentage of those by CARE/FERA participants
 - e. Bike purchase statistics by retailer, type, make, and model
 - f. Program budget status, including invoices paid out to retailers compared to what's been requested
- D. **Establish Quarterly Reports.** Provide Ava with quarterly reports including data listed in monthly reports with additional narrative and graphical representations of accomplishments, trends, and market intel, program activity, and proposed Program enhancements, improvements, and areas of concern. Quarterly Report will include the following, but not limited to, metrics:
- a. Number of customer calls, emails
 - b. Number of customer experience escalations, and time to resolution
 - c. # of additional e-bike SKUs added to QPL, if applicable
 - d. # of additional Participating Retailers added, if applicable
- E. **Annual Reports.** Provide Ava with annual reports summarizing Program results and accomplishments in narrative and numerical format, including summary of progress and highlights for the year and any significant changes in strategies or services and indirect savings acquisition activities, and program design recommendations for the upcoming Program year, as applicable.
- F. **Reporting Dashboards.** Each dashboard described below has an option to be emailed in PDF form. A direct link to the live, Power BI version will be provided to Ava. Using the Power BI version, the recipient will be able to filter the report on available fields and export the report data to Excel, PowerPoint, or PDF. The data fields available in these reports, as illustrated by the example dashboards below, may be customized by change order process only.
- G. **E-Bike Rebate Status Dashboard.** This dashboard will summarize the current total of redeemed, expired/canceled and valid (unredeemed but still redeemable) rebate vouchers.
- a. Application Status Dashboard will summarize the current total of redeemed, expired/canceled and valid (unredeemed but still redeemable) rebate vouchers.
 - b. Pre-Application Status Dashboard will summarize the current total of pre-applications the program has received. Pre-applications represent all of the

applicants seeking a rebate voucher through the random selection process. Some of these pre-applicants may be selected to receive a voucher through the random selection process after this step.

- c. Date rebate voucher
- d. Date issued
- e. Date rebate voucher redeemed (if purchase made)
- f. Date rebate voucher expired (if applicable)
- g. If rebate was redeemed:
 - i. Manufacturer, model, and serial number of e-bike purchased
 - ii. Total Cost of e-bike purchased
 - iii. Rebate amount paid
 - iv. Bike retailer that redeemed rebate
- h. Bike retailer data collected
 - i. Bike retailer contact information (address, email, and phone number)
 - ii. Bike retailer business information (Business name, tax ID)
 - iii. Bike retailer W9
- i. Rebate redemption payment details

Task 7: Invoicing

CONSULTANT will establish an escrow account for rebate funds. After the first quarter of implementation and every quarter thereafter, CONSULTANT will send an incentive invoice to Ava for the incentive amount paid in the previous quarter (net 45-day terms) such that the account is intended to always have at least three months' worth of projected incentive payments available at any given time until the program winds down. If the incentive bank account balance is reduced where there are insufficient funds to pay the next batch of incentive payments, the payments will be held until the account is sufficiently funded.

- A. CONSULTANT will invoice monthly for our administrative fees.
- B. Administrative fees will be billed as follows:
 - a. \$180,000.00 upon delivery of the portal and successful launch of program, 120 days after contract execution
 - b. Payment processing and issuance for e-bike rebates = 12.5% of every \$1 processed
 - c. Payment processing and issuance for safety equipment rebates = \$14.50 per rebate redeemed
- C. CONSULTANT will submit the following invoice components to Ava for each invoice, whether for rebate reimbursement or for our administrative fees. With each of these components submitted, the invoice will be considered complete, and Ava will process payment for each invoice per the terms of the contract, to be paid within 45 days of invoice date.

- D. **Invoice.** The monthly invoice will include project details as shown below in the invoice cover page and invoice detail page.
- a. Invoice cover page will provide the total amount of charges and the information in the blue headings shown below, such as Project Number, Date, Invoice Number, etc.
 - b. Invoice detail page will provide a breakdown of current month's rebate counts and billed amounts and summarize CONSULTANT fees separately from rebate amounts.
 - c. Rebate Transaction Report will detail each rebate check issued to BikeRetailers on behalf of program applicants and the total sum of rebates issued during the previous calendar month. This report will be submitted as a PDF attachment to the invoice.

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CONSULTANT will be responsible for returning any unused funds upon cessation of the program.

- A. CONSULTANT will be responsible for adhering to all escheatment requirements
- B. At the end of the agreement term, the balance left unspent in the incentive account will be returned to Ava

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Independent means that CONSULTANT is leading UAT without the need of Ava to be involved in the UAT process.

- D. **Test Data.** CONSULTANT will develop a minimal viable product (MVP) of the products specified in this document with schematics of the customer journey, system data flows, data schemas (i.e., data expected but don't have yet) and complete system testing with sample data.

Optional Scope: Ava Bike Electric Lending Program

Task 1: Program Establishment

If Ava issues a notice to proceed to CONSULTANT, CONSULTANT will submit an e-bike lending rebate program design and supporting documentation consistent with our existing, successful e-bike rebate programs. Issuance of a Notice to Proceed with the Optional Lending Program and Ava agrees to provide CONSULTANT with at least 60 days notice prior to launch of the Lending Program Development (i.e., 60 days before “Day 0” in the Lending Program Schedule, see Exhibit B). The program design may include, but is not limited to, the following components.

- A. **Kick-off meeting.** CONSULTANT will facilitate a kickoff meeting to establish the plan and schedule for pre-launch activities. The meeting will include the following:
 - a. **Review communication and project management approach.** This will include meeting cadence, decision making, documentation, collaboration, and communication approaches.
 - b. **Schedule overview and major milestones.** This will include a high-level draft schedule, highlighting critical path decision, approval and deliverable dates needed to maintain the proposed timeline.
 - c. **Review e-bike lending rebate program process overview.** CONSULTANT will review the workflow of applicants and e-bike lenders/retailers through the portal as well as report templates that will be available to Ava and expectations for the necessary application software interface (API) to send and receive data from Ava’s system. The purpose of this review will be to determine if there are any gaps or roadblocks for Ava related to the core portal design for follow up and ensure that both parties have the same expectations for data exchanges. This is a critical step since changes to the core portal design that require new coding or workflow changes will impact the proposed launch timeline and require a change order and level of effort determination.
 - d. **Introduce configuration playbook.** The playbook is used to document recommendations and approved decisions for all necessary program design attributes. The attributes to be reviewed and defined included all portal attributes related to the portal experience, workflow and rules.

The goal of the playbook exercise and documentation is to define the program such that design documentation and development may proceed in a timely manner. To manage change control and maintain program schedule, approved decisions within the playbook will be considered final. Changes to previously approved decisions or requested design attributes

that require significant solution engineering may lead to a change control process where scope, schedule and cost impacts will be reviewed, options considered and agreed upon prior to implementation. CONSULTANT and Ava will work closely and transparently to resolve any such barriers.

- B. Finalize program portal configuration.** CONSULTANT will work with Ava to review portal configurations, program attributes and necessary data exchanges through the use of API. Once Ava approves these configurations, a workflow validation session will review the end-to-end applicant and e-bike lender experience for final approval of configurations. Final decisions and approvals will be critical to maintaining the launch schedule. Activities will include:
- a. **Finalize applicant participation rules, product eligibility definitions and recommended terms & conditions (T&Cs).** CONSULTANT will provide these for review and approval by Ava.
 - i. Participant rules will include information for applicants that define key process requirements, timelines for completing a valid application and redeeming a rebate for a qualifying e-bike with a qualified e-bikelender.
 - ii. Clear product eligibility definitions of e-bike types eligible for rebates.
 - iii. CONSULTANT will provide a draft of participant terms and conditions for Ava's review and approval of the terms and conditions document that each applicant must electronically sign to participate in the program. CONSULTANT legal will be required to approve any changes suggested by Ava.
 - iv. Update existing Agreements for customers, e-bike manufacturers, and e-bike lenders to account for any changes in the program implementation model (PIM) and their ability to participate in the program
 - b. **Finalize e-bike lender participation rules, eligibility guidelines and recommended terms & conditions (T&Cs).** CONSULTANT will provide these for review and approval by Ava.
 - i. E-bike lender rules will include information for e-bike lenders that defines qualification requirements, transaction requirements, and timelines for becoming qualified and redeeming a rebate for a qualifying e-bike with an applicant.
 - ii. CONSULTANT will provide e-bike lender eligibility guidelines recommendations on acceptable documents to qualify for participation, applying definitions provided by Ava. Upon Ava's review and approval, these will be finalized into the program design.
- C. Engage, contract, and manage relationships with manufacturers and local e-bike lenders.** Engage all publicly known bike shops in Ava's service area on the program with the goal of 8 shops contracted ahead of the launch that reflect the

geographic diversity of Ava's service area. Ongoing engagement and contracting with additional e-bike lenders through the duration of the program, including in new member communities ahead of their launch into Ava's service. Ongoing training of e-bike lender staff and evaluating that participating e-bike lenders are meeting program requirements, including incentive verification and on-site signage, will be conducted.

- D. **Create portal workflow validation.** Once all configuration decisions have been made and approved, CONSULTANT will review and finalize for final approval by Ava. Upon approval, this will be the source document for the implementation of all configurable elements of the portal and operations.
- E. **Validate program design.** We will review the program design to ensure it meets required specifications.
- F. **Provide marketing review and experience-based knowledge to assist Ava's marketing team.** Review and provide suggestions to assist Ava Marketing Team's development of marketing materials for the E-Bike program, leveraging CONSULTANT experience from other successful programs.
- G. **Finalize e-bike lender requirements and registration.** CONSULTANT will prepare materials to lead e-bike lender recruitment and training, while providing guidance for Ava and other stakeholders to support this effort. Ava may utilize these materials and integrate them into Ava's website's landing page for the program to provide access to the e-bike lenders.
 - a. **Conduct e-bike lender enrollment.** Open and monitor e-bike lender enrollments on the portal. Approve or provide feedback to e-bike lenders upon receipt of their registrations.
 - b. **Develop e-bike lender instructions.** Develop clear instructions for e-bike lenders to access, enter information and use the rebate administration portal in a training presentation in PowerPoint to be uploaded to Ava's website. Additionally, develop a one-page reference document for e-bike lenders to utilize at the point of purchase to remind them of requirements to complete a rebate redemption properly.
 - c. **Conduct e-bike lender webinar.** Deliver one live kick-off webinar presenting the e-bike lender instructions PowerPoint to lenders. This webinar will be recorded and uploaded to Ava's website to provide ongoing access to e-bike lenders. This webinar will also be provided on the program portal, together with the training presentation. Future webinars will be conducted ahead of the launch of meaningful program changes.
 - d. **Create applicant and lender contact plan.** Advise Ava and other stakeholders on how to recruit approved e-bike lenders and participants. This will include

development of a recommended outreach timeline and email templates to, if necessary, be sent by Ava to lenders.

H. Develop and implement automated email participant communications during the customer journey.

- a. Provide a participant communications plan for Ava approval aligned with the customer journey to ensure a participant receives key information and reminders at key stages in the journey. CONSULTANT owns all participant communication after a participant is deemed eligible through the second to last stage of a customer journey pathway, while Ava owns participant communication at all other stages.

I. Advise Ava's Marketing team about:

- a. Transfer relevant knowledge from previous programs to educate Ava marketing team on program communication and marketing best practices, both to drive demand and manage expectations with stakeholders
- b. Understanding interest and participation volume expectations for marketing campaign deployment that aligns with program goals and e-bike lender capacity
- c. Benchmarks to determine whether marketing channels are performing as intended from peer programs
- d. Uncovering unique channels to engage potential Ava Bike Electric participants
- e. As requested, provide feedback on Ava developed marketing material within five (5) business days of receipt
- f. Marketing acumen that could contribute to performance of marketing activities, conversion rates, and appropriately setting expectations for a high demand program
- g. Regular meetings (weekly in the two months prior to launch and one per month after. Can be adjusted after this point by mutual agreement) to review and align marketing activities, customer support and feedback, and program performance.

J. Update Program Implementation Manual. CONSULTANT to update the existing PIM to ensure it is consistent with program designs and contains the following information:

- a. Rules and requirements for program customers, vendors, and other participants. This includes in-store signage and training requirements for participating lending locations.
- b. Process for returned incentive funds
- c. Incentive Program oversubscription and wait lists
- d. Customer Journey
- e. Customer segmentation analysis
- f. E-bike technical specifications
- g. Qualified Product List (QPL)

- h. Program Participation Agreements and T&Cs
- i. Eligible e-bikes on Qualified Product List ("QPL") – ongoing updates, especially considering UL standards. Data to be tracked and reported to Ava.
- j. Data Exchange Methods and Protocols (APIs)

Task 2: Configuration of the Rebate Administration Portal

Configure CONSULTANT's proprietary application system, to match the configuration requirements and funding streams for the program. CONSULTANT assumes this program will make use of pre-configured, existing program layouts, workflows, rules, dashboards, survey tools design materials, and reporting dashboards; pricing is based upon use of the existing designs, program, and design materials, reporting templates and program parameters.

- A. **Configure the program portal.** Prepare and test an online portal to allow qualified participants to apply for vouchers. The portal will:
 - a. Ensure each budget stream remains within required limits
 - b. Make available a customer portal that's accessible on a desktop and mobile device (iOS and Android) and create a point-of-sale e-bike incentive that uniquely applies to an eligible participants' purchase and subsequently redeemed by an e-bike lender. Ideally, the incentive would be universally applied to any participating e-bike lender.
 - c. Allow for follow up if applications are deemed incomplete
 - d. Allow for random selection of participants
 - e. Issue a Standard or California Alternate Rates for Energy (CARE)/Family Electric Rate Assistance Program (FERA) incentive voucher via random selection to borrow a standard, cargo, or adaptive e-bike for purchase at a participating lender
 - f. Upon approval, email the participant a voucher code to approved participants that can be redeemed at approved e-bike lenders
 - g. Utilize google translate function to offer translations of portal screens to users
 - h. Provide an online mechanism to allow e-bike lenders to determine if vouchers are active
 - i. Provide an online mechanism to allow e-bike lenders to submit voucher redemption requests for payment processing
- B. **Provide program introduction content.** Create landing page content (text and hyperlinks) for the program based upon brand requirements on Ava's website that will direct residents and approved retailers to CONSULTANT's application portal. Ava will integrate this content into its website.

Task 3: Establish a Customer Service Help Desk

CONSULTANT will establish a dedicated program email address and inbox. CONSULTANT will provide contact center staffing to respond to applicants and e-bike lender emails and phone

calls.

- A. **Establish contact center email and phone number.** Create a dedicated phone number and email address to assist with applicant and e-bike lender questions. Available during participating e-bike shop hours to reduce the likelihood that contacts will reach a non-response, with available hours as defined below.
- B. **Manage phone and email inquiries.** CONSULTANT will review and respond via phone and email to applicants in a first come-first served basis, with an objective to respond to and resolve applicant and e-bike lender questions, issues and/or barriers to participation as quickly as possible, per Exhibit E. Customer Service representatives will be available 9am-5pm PST, Monday to Friday and able to handle calls and emails in English, Spanish and Simplified Chinese.
- C. **Escalate complex email inquiries as needed.** CONSULTANT may escalate customer or e-bike lender emails to Ava, with recommendations, in cases where the resolution is not clear based on program rules or may require special consideration.
- D. **Direct customer response.** In some cases, if more convenient than email-only communication, CONSULTANT contact center staff may work to resolve customer or e-bike lender emails by phone.
- E. **Document process.** Provide Ava with the process to document customer issues, escalations, and resolutions for Contractor to resolve.

Task 4: Rebate Application Processing

CONSULTANT will establish dedicated staff to actively review submitted rebate redemptions from e-bike lenders (with adequate time to ensure payment within 15 business days). These staff will review and respond to applicants with scripted or customized feedback to assist their progress through the rebate redemption processes. CONSULTANT processing staff will:

- A. **Notifications.** Notify applicants of status once a voucher has been issued.
- B. **Review rebate redemption requests.** Review rebate redemptions submitted by e-bike lender to confirm program requirements are met. When requirements are met, notify the e-bike lender and process payment to the e-bike lender for payment within 15 business days. When requirements are not met, notify the e-bike lender and advise on how to meet the requirements within 2 business days.
- C. **Monitor and manage rebate approvals and redemptions.** Continuously assess the number of rebates approved and redeemed to help ensure the budgets are not exceeded or at risk.

Task 5: Rebate Distribution

CONSULTANT will distribute rebate payments to e-bike lenders in accordance with the approved program design. Tasks will include:

- A. **Issue rebate checks.** Paper rebate checks will be sent to e-bike lenders. These

lenders will have the option to enroll for electronic payment (ACH) for faster receipt of checks. Printed materials, including but not limited to stationery and paper checks related to the Incentive Program shall bear the desired program or Ava's logo, to be provided to CONSULTANT. Use of the logo is limited to the e-bike Incentive Program.

- B. **Issue 1099s.** CONSULTANT will be responsible for issuing 1099s to e-bike lenders.

Task 6: Reporting and Database

Administer the program, track, and analyze key metrics, and report program budgets and status.

- A. **Conduct ongoing Administration.** Provide ongoing management of the program and coordination with Client in the following:
- a. Schedule, facilitate, lead, and report out from weekly project management meetings with Ava during the Start Up Phase and no less than bi-weekly project management meetings after the Go Live Date. A draft agenda will be sent no later than 1 business day prior to the meeting and assign next steps no later than 1 business day after meetings in the mutually agreed upon project management software, with a preference for Asana.
 - b. Train all staff in project management software and ensure ongoing and active use for effective program delivery.
 - i. Provide Ava with the ability to access reports and download raw data directly through web-based views of the data tracking. Specific data to be tracked will be mutually decided via email and will be described in the PIM.
- B. **Regular weekly marketing report of the following to the Client:**
- a. Email Metrics: including emails sent within Vendor-managed portion of customer journey, open rate, bounce rate, and click-through rates.
 - b. Azure Telemetry/Insights: related to any customer engagement with CONSULTANT's owned/managed program web properties, including page views, demographics, campaign source, site duration, and bounce rate.
- C. **Establish a monthly report** format and key performance indicators (KPI) with Ava in the PIM to track Program performance, including Program updates, outreach status compared to Response Times, customer Information updates, any customer complaints, feedback, escalations, and Scheduled Uptime (as described in attached SLA), budget status, milestone activities, risks/issues/resolutions, incentives, and a line-item invoice. Monthly reports will provide the following, but not limited to, information, including,
- a. Total Incentive budget spent compared to funds allocated to-date
 - b. Total percent of the Incentive Budget spent on CARE/FERA customers, to be measured no sooner than 3 months after Program Launch
 - c. Number of e-bikes lent to non-CARE/FERA and CARE/FERA customers, to be measured immediately upon Program Launch, and then monthly thereafter
 - d. Total number of participants per customer journey stage, zip code, and percentage of those by CARE/FERA participants

- e. Bike lending statistics by retailer, type, make, and model
- f. Program budget status, including invoices paid out to lenders compared to what's been requested

Please note that other metrics will be negotiated later based upon available information from lenders.

- D. **Establish Quarterly Reports.** Provide Ava with quarterly reports including data listed in monthly reports with additional narrative and graphical representations of accomplishments, trends, and market intel, program activity, and proposed Program enhancements, improvements, and areas of concern. Quarterly Report will include the following, but not limited to, metrics:
 - a. Number of customer calls, emails
 - b. Number of customer experience escalations, and time to resolution
 - c. # of additional e-bike SKUs added to QPL, if applicable
 - d. # of additional Participating Retailers added, if applicable
- E. **Annual Reports.** Provide Ava with annual reports summarizing Program results and accomplishments in narrative and numerical format, including summary of progress and highlights for the year and any significant changes in strategies or services and indirect savings acquisition activities, and program design recommendations for the upcoming Program year, as applicable.
- F. **Reporting Dashboards.** Each dashboard described below has an option to be emailed in PDF form. A direct link to the live, Power BI version will be provided to Ava. Using the Power BI version, the recipient will be able to filter the report on available fields and export the report data to Excel, PowerPoint, or PDF. The data fields available in these reports, as illustrated by the example dashboards below, may be customized by change order process only.
- G. **E-Bike Lending Rebate Status Dashboard.** This dashboard will summarize the current total of redeemed, expired/canceled and valid (unredeemed but still redeemable) lending rebate vouchers.
 - a. Application Status Dashboard will summarize the current total of redeemed, expired/canceled and valid (unredeemed but still redeemable) lending rebate vouchers.
 - b. Pre-Application Status Dashboard will summarize the current total of pre-applications the program has received. Pre-applications represent all of the applicants seeking a lending rebate voucher through the random selection process. Some of these pre-applicants may be selected to receive a voucher through the random selection process after this step.
 - c. Date lending rebate voucher
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- A. CONSULTANT will invoice monthly for our administrative fees.
- B. Administrative fees will be billed as follows:
 - a. \$35,000.00 upon Lending Program Launch and Portal Configuration, 8 months after contract execution; assumes current workflows and reimbursement process.
 - b. Payment processing and issuance for CARE Customers = 12.5% of every \$1 processed
 - c. Payment processing and issuance for Non-CARE customers = 12.5% of every \$1 processed
- C. CONSULTANT will submit the following invoice components to Ava for each invoice, whether for rebate reimbursement or for our administrative fees. With each of these components submitted, the invoice will be considered complete, and Ava will process payment for each invoice per the terms of the contract, to be paid within 45 days of invoice date.
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- D. **Test Data.** CONSULTANT will develop a minimal viable product (MVP) of the products specified in this document with schematics of the customer journey, system data flows, data schemas (i.e., data expected but don't have yet) and complete system testing with sample data.

Additional Services Scope of Work

For either Incentive or Lending, CONSULTANT and/or Ava may incorporate additional services beyond the originally defined scope of the Program. These must be mutually agreed upon in writing, as necessary, to fulfill substantial changes unforeseen after establishing core parameters in the development & design of the program prior to launch. The additional scope request, sent by either Ava or CONSULTANT, for review and approval, must include objectives, deliverables, any relevant timelines, and cost. These services are deemed necessary to fulfill project requirements and achieve desired outcomes. The terms and conditions outlined in the original agreement shall apply to these additional services.

Otherwise, Consultant will not provide additional services outside of the services identified in Exhibit A, unless it obtains advance written authorization from the project manager or lead Ava representative prior to commencement of any additional services.

Exhibit E**COMPENSATION/BUDGET**

The maximum compensation under this Agreement is \$12,000,000.

Incentive Program

Program and Portal Launch	\$ 180,000	Due upon delivery
Voucher Processing	\$1,221,055	or 12.5% of every incentive dollar paid to retailers
Total Administrative Cost	\$1,391,055	
Incentives - CARE Customer (40%)	\$4,326,796*	
Incentives - Non-CARE Customer (60%)	\$5,261,793	
Total Budget	\$10,979,644	

* Assumes 14,000 vouchers issued, of which 8,200 will be redeemed. CONSULTANT will work to surpass the minimum requirement that 40% of incentive funds go to CARE/FERA customers, targeting up to 50% of incentive funds going to CARE/FERA customers across approximately 3,945 vouchers. Voucher numbers assume 60% of CARE/FERA qualified participants redeeming vouchers will select regular and 40% cargo, e-bikes. These figures reflect what CONSULTANT has seen by income customers in their existing programs but may not be reflective of choices made by Ava's program participants.

Equipment Vouchers

Voucher Processing	\$ 50,454	\$14.50 per voucher processed
Total Administrative Cost	\$ 50,454	
Incentives - CARE/FERA Customers	\$ 869,902*	\$100/voucher
Total Budget	\$ 920,356	
Note: If implemented, the funding for the equipment voucher would reduce the overall incentive and/or lending budget.		

*Assumes 3,000 vouchers redeemed by CARE/FERA customers, based upon assumptions above about breakdown of regular and cargo e-bike selections and 50% of funds flowing to CARE/FERA customers.

Additional Services Budget

Determined based on mutually agreed upon scope	\$ 100,000	Structured upon mutual agreement
Total Budget	\$ 100,000	
Note: Contingency funds are set aside for any costs associated with the Additional Services Scope of Work. Any contingency funds unspent by June 2027 will be redistributed through participant incentives in the latter half of that year.		

Ava Bike Electric: Extension Proposal

Board of Directors | July 15, 2026



Table of Contents & Recommendation

1. Program Overview
2. Impact & Value
3. Extension Proposal

Recommendation: Extend Aptim contract and add \$2M from Vehicle Electrification program funds that have not been earmarked for any Programs to Ava Bike Electric to operate through CY27

Program Overview



Current Program Overview

Ava Bike Electric continues to shift commutes, errands, outings, and recreation to affordable, safe, fun, and clean electric transportation while decreasing road congestion.

Target Segment: Ava customers and any resident of Alameda County over 18 years old

Enrollment Goal: incentivize 7,700 - 8,200 e-bikes, with at least 40% of e-bike incentive funds and 100% of safety equipment incentive funds to income qualified participants

Launch Date: July 8, 2025; last monthly drawing Sept '26 with a scheduled program end date of Dec '26

Program Budget: \$10M, with \$6M from Ava and \$4M from Alameda County Transportation Commission (Alameda CTC). 86% of program budget dedicated to incentives with remaining 14% toward program admin costs.

Operational Partners: Program Admin Co-Funder Inclusion of City of Alameda



Alameda County
Transportation Commission



Adaptive Marketing Tactics



Offline Marketing

- Earned Media and PR
- Community Partner Promotion
- Bike Shop Signage and Promotion
- Outreach at In-Person Events



Digital Marketing

- Organic Social Media
- Website updates and SEO Optimization
- Newsletter
- Community Partner Promotion
- Ava email marketing - targeted only

NOTE: In Oct 2025, Ava started email marketing with targeted audiences to boost awareness & participation in jurisdictions where it was lacking compared to proportion of residential customers served: Stockton, Tracy, Lathrop, Fremont, & Unincorporated San Joaquin County (at the start of their inclusion).

Impact & Value



Outcomes through 5.31.26



Recognition: 26K+ applicants, program page #1 on Ava's website and drawing 35% more visits than Ava home page, & ongoing engagement over 3-9 months for each participant



Local business investment & participation: Every \$1 in rebates = \$1.71 in new sales at brick & mortar bike shops that in turn contributes to local tax revenue; 29 participating bike shops and at least 1 shop in every Jurisdiction that has one. Note: Emeryville, Piedmont, Union City, Newark, Lathrop, & Unincorporated San Joaquin County don't have a qualifying bike shop.



Delightful user experience: no outages, every drawing has occurred on-time, & consistent praise about ease to apply & redeem rebate. Made improvements to eligible e-bike list, income qualifying period, & auto emails responding to user challenges.



Access & Affordability: available to ALL customers regardless of housing type or income level; 96% wouldn't have gotten an e-bike without rebate; Fuel cost: \$5.50* = ~1,833 miles on e-bike or ~57 miles in a Toyota Prius Source: avg price for gallon of gas across Ava's service area. [AAA](#), 6.24.26



Reducing congestion & GHG: Net Mode shift: 62% driving less and 89% biking more. Avg 417 lbs lower CO₂ for every e-bike on road in first 12 months or annual GHG equivalent of 1 fossil fuel car taken off the road for every 23 e-bikes purchased.



Brand Awareness & Customer Satisfaction (cSat): 44 media hits; program webpages represent 3 of 4 most visited pages on Ava's website; 83,800 *new* users have visited Ava's website.

Since program launch, Ava cSat scores 62% → 73% (not entirely from program) *and* 65% of all positive sentiments directly related to Ava Bike Electric

Additional Program Value



Climate Action Plans (CAP) alignment in Ava jurisdictions: every CAP Attachment Staff Report Item 16G*
calls for mode shift, reducing driving, increased biking, & equitable access but few specify *how*. Our program bridges delivery gaps with scaled solution & measurable outcomes toward those equity-aligned goals.

CAP Measures	Key takeaway related to e-bikes
Reduce Vehicle Miles Traveled (VMT)	E-bikes directly operationalize VMT reduction targets that are central across all CAPs.
Increase Active Transportation Mode Share	CAPs invest in bike infrastructure — Ava Bike Electric ensures more people actually use it .
Enable Transportation Demand Management (TDM)	E-bikes are one of the few TDM strategies that directly replace commute trips .
Improve Transit Access (First/Last Mile)	Transit investments depend on access — e-bikes unlock that access and reduce car dependency for first/last mile .
Advance Equity & Mobility Access	E-bikes are one of the fastest ways to deliver visible equity & access outcomes tied to CAP goals.
Deliver Measurable GHG Reductions	E-bikes provide near-term, scalable emissions reductions , especially where EV adoption is slower.

*analysis derived from Berkeley, Hayward, Dublin, Oakland, San Joaquin County, San Leandro, Union City, Pleasanton, & Fremont CAPs

Participation throughout Ava Service Area

Fairly proportional participation in most jurisdictions compared to proportional share of Ava's overall residential accounts, except in San Joaquin County despite heavier Ava marketing, likely due to differences in biking access from more dense infrastructure (e.g. 201 miles bikeways in Oakland vs. 181 miles in our service area in San Joaquin County*) and eligible e-bike businesses (29 shops in Alameda County vs. 2 in our service area of San Joaquin County)

Jurisdiction (as % of Ava residential accounts)	Rebates Redeemed (as % of total)
Alameda (0%)	4%
Albany (1%)	2%
Berkeley (7%)	14%
Dublin (4%)	2%
Emeryville (1%)	3%
Fremont (11%)	9%
Hayward (7%)	8%
Lathrop (1%)	1%
Livermore (4%)	4%
Newark (2%)	2%
Oakland (24%)	27%
Piedmont (1%)	1%
Pleasanton (4%)	3%
San Leandro (4%)	5%
Stockton (13%)	4%
Tracy (4%)	1%
Union City (3%)	3%
Total	5,783
Alameda County (80%)	94%
San Joaquin County (20%)	6%

Extension Proposal



Why extend? How much & how long?

- Continue providing a valuable, high-demand program while Ava is developing the Customer Programs Roadmap
- Propose \$2M from already approved but un-earmarked Vehicle Electrification budget, with range of \$1.5M-\$3M at Board's direction
- Extend contract with Aptim through CY27 to manage program and deliver an additional ~1,600 e-bikes purchased with at least 40% of incentive funds to income qualified participants
- Regardless of extension, thoughtful wind down of program by end date to ensure a soft landing for local bike shops and evergreen customer materials to still learn about e-bikes & resource across our service area



How will this proposal be funded?

Staff proposes to use funds from the Vehicle Electrification budget that were already Board approved but not earmarked for any program

Program Area		Balance	Earmarked
	Local Development	\$2,800,000	\$2,600,000
BE+EE	Building Electrification	\$14,600,000	\$8,500,000
	Building Efficiency Accelerator	\$1,300,000	\$1,000,000
	Vehicle Electrification	\$8,100,000	\$4,500,000
TE	Ava Charge	\$15,900,000	\$15,900,000
	Bike Electric	\$2,200,000	\$2,200,000
	SmartHome Charging	\$5,700,000	\$1,700,000
Resilience	Critical Municipal Facilities (CMF)	\$5,800,000	\$5,800,000
	SmartHome Battery	\$10,900,000	\$10,900,000
	Resiliency Hubs	\$5,600,000	\$5,600,000
BE+TE	Virtual Power Plant DERMS Platform	\$1,900,000	\$1,900,000
Grants	Community Investment Grants	\$8,800,000	\$8,800,000
	Total	\$83,600,000	\$69,400,000

Thank you!



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Social

[PoweredWithAva](#)

Additional Slides



Instant Rebate Amounts

Type of E-Bike	Base Instant Rebate	Income-Qualified* Instant Rebate
Standard	\$400	\$1,000
Cargo	\$900	\$1,500
Adaptive	\$900	\$1,500
Safety Equipment Rebate (helmet, locks, lights)	N/A	\$250

*To be eligible for the Income-Qualified Instant Rebate, household must be enrolled in California Alternate Rates for Energy (CARE), Family Electric Rate Assistance (FERA), or Energy Assistance Program (EAP).

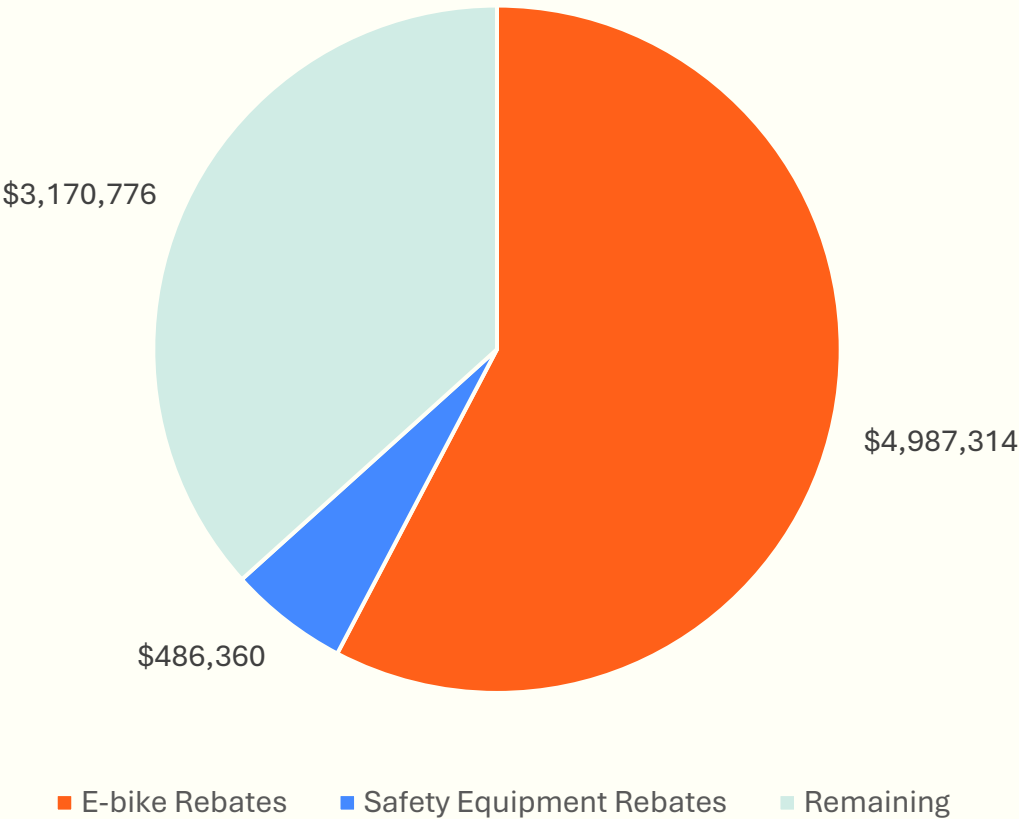
Outcomes through 5.31.26



E-bikes & Equity: At 63% incentive budget spent, 5,783 e-bikes purchased and 55% of rebate funds redeemed by Income Qualified participants.

Attachment Staff Report Item 16C

Incentive Budget Spend through 5/31/26



It's all about benefiting local residents...



Andrea and her two kids, who live in Oakland and rode 145 miles in their first 30 days

“...This addition to our family has been **life-changing. We go to the grocery store, local errands, parks and visit family.** On Monday, we rode through the Oakland hills to Roberts Regional Park. Our girls were mesmerized by the beautiful trees and winding roads. They **could not contain their excitement** as we rode downhill, weaving in and around some beautiful paths. My husband installed a bike bell for the girls to ring and they have enjoyed ringing it whenever we are riding. It **felt extra special to ride up the Oakland hills again** to Montclair yesterday for my older daughter's ballet class....Today, my younger daughter and I went to Emeryville on the Tern so that I could do some labs for an upcoming doctor's appointment. Riding our e-bike has been a great experience to navigate in the bay area!...**We are having a blast** and love this new e-bike!"

Marketing with Partners



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School District

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Apply for subsidy to buy an electric bicycle

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Media Contact

Seung Lee

Communications Specialist

(510) 981-7020

slee@berkeleyca.gov



Ava Bike Electric

Save hundreds on a new e-bike.



Apply now for an instant rebate of \$400 to \$1,500. Random drawings take place on the fourth Tuesday of every month.
AvaEnergy.org/bike-electric



	BASE REBATE	INCOME-QUALIFIED REBATE*
Standard	\$400	\$1,000
Cargo	\$800	\$1,500
Adaptive	\$800	\$1,500

Safety Equipment Rebate (Helmet, Locks, Lights)

N/A

\$250

*Eligible for the Income-Qualified Instant Rebate, your household must be enrolled in California Alternate Rates for Energy (CARE). Family Electric Rate Assistance (FERA) or Energy Assistance Program (EAP).





Ava Bike Electric

Ahorre cientos de dólares en su nueva bicicleta eléctrica.



Aplique ahora y reciba un reembolso instantáneo de entre \$400 y \$1,500. Los sorteos se realizan el cuarto martes de cada mes.
AvaEnergy.org/es/bike-electric



	REEMBOLSO BASE	PARA PERSONAS CON INGRESOS LIMITADOS*
Estándar	\$400	\$1,000
De Carga	\$800	\$1,500
Adaptada	\$800	\$1,500

Para equipo de seguridad (Casco, candado, luces)

N/A

\$250

*Para ser elegible para el Reembolso Instantáneo, su hogar debe estar inscrito en el programa de Tarifas Alternas de California para la Energía (CARE). El programa de Asistencia Tarifaria Familiar (FERA) o el programa de Asistencia Tarifaria (EAP) de la Energía.



