

**Planning and Capacity Building,  
Clean Mobility in Schools, and the  
Sustainable Transportation Equity Project  
FY 2022-23 Request for Applications**

**APPENDIX B:  
Full Phase Application Template**

**ATTACHMENT II:  
Scope and Timeline Template**

**Note:**

If you require this document in an alternate format or language, please contact Heather Choi at (279) 208-7556 or [heather.choi@arb.ca.gov](mailto:heather.choi@arb.ca.gov). TTY/TDD/Speech to Speech users may dial 711 for California Relay Service.

July 24, 2023

**Instructions:** Use the template below to describe the project scope and timeline. If selected for award, this or a modified version of this scope and timeline will be included directly in the grant agreement.

## I. Scope of Work

**Instructions:** Starting with Task 2, update any bracketed instructions to fit the proposed projects. Include one project per task. Each task may include no more than 5 sub-tasks. Continue this structure with one task per project and up to 5 sub-tasks per task to describe all the activities necessary to implement each project.

Do not modify Task 1. Task 1 contains general grant management requirements.

### Task 1. Grant management

Administer the various tasks of the project including participation in meetings with the California Air Resources Board (CARB) or the Statewide Planning and Capacity Building Project Administrator (PCB Administrator); development and implementation of the Project Plan; record-keeping procedures; reporting procedures; and financial tracking and disbursements. Throughout this task "Administrator" refers to CARB for Clean Mobility in Schools (CMIS) and the Sustainable Transportation Equity Project (STEP) grants and the third-party PCB Administrator (and CARB as needed) for Planning grants.

#### 1.1. Conduct meetings and communicate with Administrator staff.

1.1.1. Kick-off meeting: The Grantee's and Subgrantee's key project personnel, in collaboration with the Administrator, will plan, attend, and conduct a kick-off meeting with Administrator staff within 45 days of the execution of the Grant Agreement, unless another timeframe is agreed upon by the Administrator. The kick-off meeting will be virtual unless otherwise noted by the Administrator. Topics for discussion may include, but not be limited to, the following:

- a. Upcoming project tasks, timelines, and milestones
- b. Opportunities for synergy between project tasks
- c. Content and format for quarterly reports, annual data collection, and final reports
- d. Next steps for and Administrator review of Project Plan and outreach and education materials
- e. Schedule for ongoing coordination meetings
- f. Other items as necessary

1.1.2. Continue coordination with the Administrator to discuss project status. Check-ins with the Administrator will be held monthly or quarterly, per the Administrator, and a final meeting will be held at the conclusion of the project. At minimum, the Grantee's key project personnel will participate

in meetings with Administrator staff. Other project partners may participate as needed or as requested by the Administrator. Meetings will be virtual unless otherwise noted by the Administrator. Additional meetings may be scheduled at the discretion of the Administrator. Check-ins are the responsibility of the Grantee and should include:

- a. Agenda for the meeting with online meeting information provided prior to the meeting
- b. Discussion of project activities, deliverables, schedule, and milestones
- c. Discussion of any difficulties encountered since the last project update
- d. Concerns or questions requiring resolution from the Administrator
- e. Notification of any pending disbursement requests
- f. Scheduling the next project coordination meeting

1.2. Coordinate with all project partners, including Subgrantees and Community Partners, following the decision-making structure and the governance, legal, and financial relationships set out in the partnership structure. This must include:

- a. Executed agreements with all parties that will be compensated in return for specific work or information supplied as part of the scope of work.
- b. Regular communication with all Subgrantees, such as check-ins to keep track of progress made and troubleshoot issues encountered. The Grantee is responsible for keeping the Administrator informed of progress on all projects, including those that are being led by one of the Subgrantees.
- c. Regular communication with all Community Partners in a mutually agreed-upon format to share progress and receive feedback on project implementation and design
- d. Accessible public meetings to share progress and receive feedback on project implementation and design.
- e. Updates to Community Partners and other community stakeholders on how their feedback is being incorporated into the design and implementation of the project
- f. Participation in the Clean Mobility Equity Alliance
- g. Coordination with other CARB projects (e.g., Access Clean California, Clean Mobility Options Voucher Pilot) where appropriate and as requested by the Administrator

1.3. Develop the Project Plan. This plan will serve as a more detailed blueprint of the scope of the grant overall. It is meant to be a useful tool for the Grantee, the Administrator, and other partners to plan, understand, and refer back to details of the work agreed upon. The Administrator must review and approve the plan before it is implemented. The Grantee, the Administrator, and the project partners should revisit the Project Plan consistently over the grant term and update as needed within the bounds of the grant agreement scope. This

plan will include multiple parts, which, depending on the project types funded, may include but are not limited to:

- a. Outreach and engagement plan
- b. Data collection, evaluation, and reporting plan
- c. Internal procedures, communication, and partnership structure plan
- d. Vehicle acquisition plan
- e. Individual project or service operations plans
- f. Long-term sustainability plan

1.4. Fulfill any needed project readiness requirements such as obtaining permits for charging infrastructure, obtaining encroachment permits, and ensuring sufficient electrical capacity at designated charging station sites.

1.5. Project records. Establish and maintain records on each aspect of project implementation. Report on and assess progress throughout project implementation via a combination of metrics defined by the Administrator and metrics defined by the Grantee and the community. The purpose of data collection and reporting is to document and assess the outcomes of each funded project, which may include better understanding the projects' impacts on behavior change, vehicles miles traveled, and equity.

1.5.1. For all projects, track and report metrics, such as, but not limited to, the data types outlined in the solicitation on an annual basis.

1.5.2. Participate in third-party research projects as requested by the Administrator.

1.5.3. Status Reports: Submit numbered status reports accompanying grant disbursement requests to the Administrator at least quarterly (for CMIS and STEP grants) or bi-annually (for Planning grants) but may submit more regularly if necessary to justify more frequent disbursements with prior approval from the Administrator. Status reports must follow a specific format and include specific topics as requested by the Administrator.

1.5.4. Final Report: The Final Report must be submitted within 90 days of the Administrator receiving the draft Final Report, by March 31, 2027 (for CMIS and STEP grants), or by December 31, 2026 (for Planning grants), whichever comes first. A draft Final Report is due to the Administrator within 30 days of project completion, by December 31, 2026 (for CMIS and STEP grants), or by September 30, 2026 (for Planning grants), whichever comes first. Final reports must follow a specific format and include specific topics as requested by CARB.

1.5.5. Identify participant data that are confidential and develop

measures to keep these data confidential. For example, individuals' physical characteristics, residential address, wage and salary information, driver's license or state-issued ID number, and insurance policy number must be kept confidential.

1.5.6. Develop a systematic process and schedule to back up database(s) on a daily basis at a minimum.

1.5.7. Develop and enforce security measures to safeguard project database(s).

1.5.8. Store all records in a secured and safe storage facility that maintains confidentiality and provides fire and natural disaster protection.

1.5.9. Retain files during the term of the Grant Agreement plus three years after the grant term expires.

1.5.10. Transfer all project records to the Administrator once the project ends or five years after the grant term expires, whichever comes first.

1.6. Document, track, and report expenditures, including expenditures of State funds and resource contributions.

**Task 2. [Name of Project #1]**

[Briefly describe project.]

2.1. [Briefly describe first task.]

2.2. [Briefly describe second task.]

2.3. [Briefly describe third task.]

**Task 3. [Name of Project #2]**

[Briefly describe project.]

3.1. [Briefly describe first task.]

3.2. [Briefly describe second task.]

3.3. [Briefly describe third task.]

## II. Task Timeline

**Instructions:** Complete the table below with an estimated start date and end date for each task and sub-task. Add or remove lines as needed until every sub-task in the scope above is included.

Task #	Approximate Start Date	Approximate End Date
Task 1	May 15, 2024	[Grant Term End Date]
Task 2.1		
Task 2.2		
Task 2.3		
Task 3.1		
Task 3.2		
Task 3.3		
Task XX		