Clean Mobility Options
Vouchers for Disadvantaged Communities

Work Group Meeting #3:
Key Program Design Considerations

September 27, 2019

Welcome and Introductions

Today's Agenda

1. **Welcome and Introductions**

2. **Program Background**

3. **Updates on Program Design Elements**

   a. Fund Allocations and Timing
   b. Distribution of Funds
   c. Application Evaluation Process

4. **Revised Eligibility Criteria**

   a. Project Eligibility
   b. Infrastructure Eligibility
   c. Transportation Needs Assessments Documents
   d. Applicant Eligibility
   e. Voucher Process

Today's Agenda (continued)

5. Breakdown of Allowable Voucher Amounts

6. Resource Contribution

7. Lunch Break 12:00-1:15 pm*

8. Community Transportation Needs Assessment Voucher
   a. Needs Assessments Voucher Concept
   b. Needs Assessments Voucher Process

9. Update on Mobility Provider Directory

10. Update on Outreach Events

11. Next Steps

*If all agenda items are presented before lunch, then the meeting may end early

Program Background

Program Goals

Improve disadvantaged communities (DAC)* access to clean mobility options that are safe, reliable, convenient, and affordable while also furthering:

» **Mobility equity**

» **Climate mitigation and local air quality**

» **Increased zero-emission vehicle (ZEV) adoption**

» **Reduced vehicle miles travelled (VMT)**

» **Workforce development**

Prioritize mobility equity and implement SB 350 recommendations

*DACs are defined as 75th percentile in CalEnviroScreen 3.0

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Program Objectives

» Streamline access to funds for underserved communities

» Support "small-scale" projects

» Ensure equitable distribution of funding

» Build capacity to support voucher recipients in achieving the project goals

» Ensure the longevity of projects

Process for Developing Program Design

» Proposed eligibility criteria are based on a variety of factors, including but not limited to:

   » Anticipated project costs

   » Lessons learned

   » Stakeholder feedback

» Criteria being refined and finalized through a robust public process

» To be included in the Program Implementation Manual and Terms and Conditions documents

Updates on Program Design Elements

Fund Allocations and Timing

Initial Approach

$14M from FY 2017-18 funding in voucher funds for the first application window (opens in Jan 2020) and $15M from FY 2018-19 funding available for the second window

Revised Approach

Additional $6M from FY 2018-19 funding (out of $15M) is being added to first window

$20M available for first application window
(tentative timeframe: **February 2020**)

~$9M available for second window

Distribution of Funds
Initial Proposal in WG#2

"Geographical Allocation Approach"

» **$1M: Northern CA** (Santa Clara, Sacramento and points north counties)

» **$3M: San Joaquin Valley, Central California** (South to LA, Ventura counties)

» **$4M: Los Angeles Metro** (LA, Ventura, Orange counties)

» **$4M: Inland Empire and Border** (Riverside, San Bernardino, San Diego, Imperial counties)

» **$1M: Tribes**

» **$1M: Community Transportation Needs Assessment Vouchers**

Distribution of Funds
Revised Proposal

"Statewide Approach"

$20M available for first application window (tentative timeframe: **February 2020**)

» **$19M statewide allocation** for **mobility project vouchers** available to applicants from **any region** (including **$1M** dedicated to eligible **tribal authorities**)

» **$1M in community transportation needs assessments vouchers**

Application Evaluation Process
Initial Proposal in WG#2

Modified first-come, first-serve approach

» Application window opens for ~1 month

» Submit applications at any time during the open window

  » Applications received grouped together

  » No advantage to early applications

» Evaluated based on minimum eligibility criteria

» If oversubscribed, qualified applications prioritized based on readiness/needs criteria

» Qualified applications not funded are placed on waitlist

Application Evaluation Process
Revised Proposal

Traditional first-come, first-serve approach

» Application window opens for **~1 month**

» Evaluated based on minimum eligibility criteria

» **Qualified applications** are approved in the order in which they are received **(time stamp)**

» All qualified applications are approved until funding allocation is exhausted

» Qualified applications not funded are invited to apply in subsequent application windows **(no waitlist)**

Revised Eligibility Criteria

Project Eligibility
Transportation Network Companies

Initial Proposal in WG#1

» TNC services (e.g. Uber/Lyft) eligible as a core project model, including single-occupant rides and rides in internal combustion vehicles

Revised Proposal

» To be eligible as a core project model, TNC services must always operate in "shared mode" to allow for shared rides OR be serviced by zero-emission vehicles

» Single-occupant or non zero-emission TNC rides can be subsidized up to 10% of the voucher budget as a "transportation enhancement"

Infrastructure Eligibility
"Level 3" EV Charging Equipment

Previous Proposal in WG #1

» Level 3 / DC fast charging equipment is not eligible

Revised Proposal

» Level 3 / DC fast charging is eligible, with more strict readiness requirements to be met in application:

> » EVSE provider identified in the application

> » All sites identified in the application, with applicant site control at the time of application submittal

> » Ownership or agreement with site owner

Infrastructure Eligibility
New: Solar for EV Charging

Intent:

» Encourage electric vehicle charging with renewable energy, consistent with State goals

» Reduce long-term operating costs to promote financial sustainability

Proposal:

» Reimburse solar photovoltaic installation at a certain $ amount / watt capacity

» Limit to installations that are covered by State programs such as Solar on Multifamily Affordable Housing

» Align eligibility criteria, payment milestones, and documentation requirements

Application Contents
Needs Assessments Documents

Initial Proposal in WG #2

Requirement to provide documentation of community transportation needs through broad-based engagement, such as:

- » Input from community meetings or workshops
- » Community resident surveys
- » Existing transportation studies or plans that included a substantial community engagement element
- » Partnerships with Community Based Organizations

Application Contents
Needs Assessments Documents (cont.)

Revised Proposal:

Requirement to provide documentation of transportation needs **and community preferences for transportation solutions**, through **meaningful, broad-based engagement**. Must include:

1. **Transportation Access Data Analysis**, such as resident surveys and analysis of existing data/indicators
2. **Community Engagement** through at least two venues such as workshops, house meetings, focus groups, interviews, etc.
3. **Final Report** summarizing conclusions*

*The application must demonstrate a connection between the needs assessment conclusions and a proposed project

Applicant Eligibility

Initial Proposal in WG #2:

"Operator Eligibility": Each project team must include a mobility operator with at least one year of experience operating the proposed project model (e.g. round-trip carsharing)

Revised Proposal:

"Applicant Experience": Each project team must include **an organization** with at least one year of experience operating **mobility services**

Voucher Process – intent

Previous Proposal in WG #2

Ensure that applicants are accountable to liquidate funds by deadline (early 2021), or return voucher within specified timeframe to enable another entity to apply for voucher and use funds

Revised Proposal

» Voucher agreement term includes up to 12 months of pre-launch period for project design and development and additional **4 years for project implementation**

» Voucher funding is available for:

  » **Design/development period: up to 12 months**
  » **Years 1 and 2 of implementation**

Voucher Process
Voucher Expiration

Initial Proposal in WG #2

Vouchers expire after **6 months** from notice of award

Revised Proposal

» Projects must launch within 12 months of award, or unclaimed voucher funds expire

» Voucher funds for capital costs must be redeemed within 6 months of award, or all unclaimed voucher funds expire

» Voucher funds for planning or operation & maintenance (milestone-based vouchers funds) may be redeemed throughout voucher agreement term

Voucher Process
Voucher Expiration (cont.)

» Milestone-based voucher funds must be redeemed **within 3 months** of the scheduled milestone or they expire

» In all cases above, vouchers may be **renewed for 3 months** on a case-by-case basis

Breakdown of Allowable Voucher Amounts

Proposed Voucher Amount per Vehicle*

» **New ZEV with ≥ 299 miles of range**: Up to **$60,000**

» **New ZEV with ≤ 299 miles of range**: Up to **$40,000**

» **New PHEV with 6 or more seats**: Up to **$40,000**

» **Leased new ZEV with ≥ 299 miles of range**: Up to **$400 monthly** (with up to $3,000 down)

» **Leased new ZEV with ≤ 299 miles of range**: Up to **$300 monthly** (with up to $3,000 down)

» **Used ZEV or PHEV- only Model Year 2016 or newer**: 100% per vehicle of KBB price for the same condition, capped at levels above

*All vehicles must be eligible for CVRP and/or HVIP at time of purchase

Proposed Voucher Amounts per Vehicle (cont.)

» **Voucher funds for eligible HVIP* vehicles** are limited to the same voucher amounts as HVIP vouchers

  » This program will not pay for 100% of costs for those vehicles

  » Additional CMO plus-ups up to $15,000 are available based on vehicle battery range

  » Additional funds for new ADA-compliant options for van size and up (e.g. wheelchair lift, wheelchair ramp)**: Up to $20,000

 *Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project

** ADA retrofits for used vehicles are not eligible for funding

Proposed Voucher Amounts per Vehicle (cont.)

» New neighborhood electric vehicle: Up to **$15,000**

» New electric passenger tricycle (3-4 seats): Up to **$5,000**

» New bicycle: Up to **$1,500**

» New electric bicycle: Up to **$2,500**

» New electric kick-scooter: Up to **$700**

Proposed Voucher Amounts for Vehicle Infrastructure

» **Level 2 EVSE*** (equipment, labor and site work associated with installation): Up to **$26,000** per charging unit (single port or dual port)

» **Level 3 / fast charging EVSE****: Up to **$97,000** per charging unit

» **Hydrogen fueling station**: Up to **$100,000** per installation on case-by-case basis

* Up to two charge ports <u>per vehicle </u>are eligible for voucher funds

** Up to two charge ports <u>per project </u>are eligible for voucher funds

Proposed Voucher Amounts for Bicycle/Scooter Infrastructure

» **Bicycle/scooter infrastructure** (including docking equipment, lockers, charging, and "quick build" right-of-way infrastructure): Up to 200% of the voucher-reimbursable amount for bikes or e-bikes in the project fleet

» Up to total of $300,000 for conventional fleet or $500,000 for electric fleet (see examples below)

Number of **Bike/Scooter**	Reimbursable amount for bikes (@$1,500 / bike)	Max infrastructure $ (at 200%)	Number of **Electric Bike/Scooter**	Reimbursable amount for e-bikes (@$2,500 / e-bike)	Max infrastructure $ (at 200%)
10	$15,000	$30,000	10	$25,000	$50,000
20	$30,000	$60,000	20	$50,000	$100,000
50	$75,000	$150,000	50	$125,000	$250,000
100	$150,000	$300,000	100	$250,000	$500,000

Proposed Voucher Amounts by Cost Category

» Outreach and Marketing

  » Minimum $25,000 or 10% of total voucher amount (whichever is more) and up to Maximum 30%

» Operations & Maintenance: Up to 90% of total voucher amount

» Other Transportation Enhancements: Up to 10% of total voucher amount

Resource Contribution – Intent

» Minimize barriers to entry for applicants while ensuring documented commitment to sustainability of the project

Resource Contribution – Proposal

Eligible methods of resource contribution may include:

1. Relationships with project-related community groups or CBOs not part of core partner team
2. Coordination with non-CARB funded research initiatives that are project-related and/or connect to clean mobility broadly
3. Labor costs
   - Up to 1 year prior to date of award if directly project-related
   - During project implementation
4. Project-related Materials / Assets already owned by project participants and/or donated to the project

Resource Contribution – Proposal (cont.)

5. Technology and Equipment already owned by project participants and/or donated to the project
6. Energy costs during project implementation
7. Donated land for infrastructure
8. Construction or installation of eligible infrastructure such as EVSE or bicycle parking
9. Cash from other funding sources (non-Low Carbon Transportation Investments)

Resource Contribution – Proposal (cont.)

» Applicants must select **a minimum of 5 methods** of providing their resource contribution from the list of eligible methods

» If costs are counted as a resource contribution, these costs cannot be reimbursed through the project voucher

» The resource contribution does not need to equal a specific percentage of the total voucher amount to fulfill the requirement

» No requirement to have a specific monetary value associated with each resource contribution

Lunch Break

Community Transportation Needs Assessment Voucher

(Needs Assessments Voucher)

Needs Assessment Voucher Concept – Intent

» Funding for communities that have not conducted Needs Assessments

» Needs Assessments are required for Mobility Project Voucher Applications

» Separate Needs Assessments Vouchers will enable communities to meet Mobility Project Voucher eligibility criteria

» Those that receive Needs Assessment Vouchers are not automatically approved or prioritized for Mobility Project Vouchers

Needs Assessment Voucher Concept – Proposal

Total Funds

» $1,000,000 allocated on a statewide basis

Application Process

» Traditional first-come, first-serve (approved in order received)

» No waitlist created if oversubscribed

Eligible Project Area

» Same as Mobility Project Voucher Project Areas

Needs Assessment Voucher Concept – Proposal (cont.)

Maximum Voucher Amount

» $50,000 per voucher

Resource Contribution Requirements

» None

Voucher Redemption and Expiration

» Vouchers are redeemed on reimbursement basis

» Vouchers expire after **6 months**

Needs Assessment Voucher Concept – Proposal (cont.)

Applicant Eligibility: Same as Project Voucher

» **If the applicant is not a Community-Based Organization (CBO), they must have a letter of support from a project-related CBO or community group**

» One applicant can apply for a project voucher and a needs assessments voucher simultaneously only if the project areas are different

» Counties with multiple unincorporated communities (e.g. no local municipalities to represent them) may apply for up to 3 vouchers to conduct needs assessments in different communities

Needs Assessment Voucher Concept – Proposal (cont.)

Project Eligibility / Methodology

» Same as needs assessment requirements in Mobility Project Voucher application

» Document transportation needs **and community preferences for transportation solutions,** through **meaningful**, broad-based engagement. Must include:

1. **Transportation Access Data Analysis**, such as resident surveys and analysis of existing data/indicators

2. **Community Engagement** through at least two venues such as workshops, house meetings, focus groups, interviews, etc.

3. **Final Report** summarizing conclusions and proposed next steps

Update on Mobility Provider Directory

Update on Mobility Provider Directory

» 18 RFI responses received; multiple project models and geographies represented

» Version 1 of Directory to be published in early November

» Version 2 of Directory to be updated in early 2020

Update on Outreach Events

Upcoming Regional Outreach Forums:

» **October 28:** 9am - 12pm @ Blue Lake Casino, Blue Lake
» **November 4:** 1pm - 4pm @ Pechanga Tribal Hall, Temecula
» **November 14:** 1:30pm - 4:30pm @ Riverside-Arlington Library, Riverside
» **November 15:** 2pm – 5pm @ CA Community Foundation, Los Angeles
» TBD October / November in Oakland, Fresno, and San Diego

Upcoming Webinars:

» Bikesharing with CMO: October 8, 10am - 11am
» Role of Philanthropy in CMO: October 17, 10am -11am
» Clean Mobility 101 for Communities: October 29, 10am -11am
» Additional TBD
» Additional Tools and Technical Assistance starting in November

Next Steps

Next Steps

Program Design

» Incorporating feedback from Work Groups 1 through 3 into Program Implementation Manual

» Implementation Manual to be published in November/December and include:

  » Project Eligibility Criteria

  » Application Package

  » Voucher Agreement

Clean Mobility Options
Vouchers for Disadvantaged Communities

THANK YOU!

Please submit questions and comments by **October 4th** to: info@cleanmobilityoptions.org