

May 2020



# SB 350 Education, Outreach & Engagement Strategic Roadmap

Equitable Access to Clean Transportation & Mobility Options







## Acknowledgements

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Development of the Equitable Access to Clean Transportation & Mobility Options Education, Outreach & Engagement Strategic Roadmap was a collaboration among staff across the California Air Resources Board, California Strategic Growth Council, California Department of Transportation, and the California Energy Commission, with further feedback and enhancements provided by several key external partners and stakeholders. This includes organizations that are part of the Charge Ahead Initiative, whom the California Air Resources Board staff have worked with from the inception of the SB 350 project. The California Air Resources Board thanks these entities for their valuable contribution and encourage continued feedback in support of further developing this document.

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# Acronyms and Abbreviations

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AB	Assembly Bill
CALCOG	California Association of Councils of Governments
CalEPA	California Environmental Protection Agency
CalRecycle	California Department of Resources Recycling and Recovery
Caltrans	California Department of Transportation
CARB	California Air Resources Board
CBO	Community-Based Organization
CCI	California Climate Investments
CDPH	California Department of Public Health
CEC	California Energy Commission or Energy Commission
CPUC	California Public Utilities Commission
CSE	Center for Sustainable Energy
CTC	California Transportation Commission
CVAP	Clean Vehicle Assistance Program
CVRP	Clean Vehicle Rebate Project
CWDB	California Workforce Development Board
EJAC	Environmental Justice Advisory Committee
EV	Electric Vehicle
FCCC	Foundation for California Community Colleges
LCT	Low Carbon Transportation
LCTI	Low Carbon Transportation Investments
MPO	Metropolitan Planning Organization
NGO	Nongovernmental Organization
PA	Program Administrator
SB	Senate Bill
SGC	California Strategic Growth Council
TA	Technical Assistance
ZEV	Zero-Emission Vehicle

# Executive Summary

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The California Air Resources Board's (CARB's) SB 350 Low-Income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-Income Residents identified obstacles often faced by low-income residents in accessing clean transportation. Those include community barriers (access, safety, convenience), affordability, funding, and lack of information and awareness of available clean transportation options. One recommendation from the report calls for CARB to "Develop an Outreach Plan Targeting Low-income Residents across California to Increase Residents' Awareness of Clean Transportation and Mobility Options."

This SB 350 Education, Outreach, and Engagement Strategic Roadmap (Roadmap) identifies strategies to coordinate clean transportation outreach and improve community engagement.

The Roadmap identifies five strategies and a series of complementary tasks (see Tables 1 - 5) to streamline outreach:

- 1. Outreach Landscape Assessment:** Understand and learn from past outreach successes and challenges, and develop approaches to align, standardize, and coordinate statewide outreach.
- 2. Strengthen, Build and Maintain Partnerships:** Create strong collaborative relationships among outreach partners to leverage efforts, improve messaging, delivery, and material development, and provide sustainable and long-term support to community-based organizations (CBOs) for direct community engagement.
- 3. Engage Priority Populations to Identify Outreach and Transportation Needs:** Leverage CBOs' community knowledge to improve understanding of outreach and transportation needs, and integrate community-identified needs into CARB-led projects including transportation incentive programs.
- 4. Develop Consistent Outreach Messaging & Materials:** Develop and incorporate a set of consistent and meaningful outreach messages that speak to the values (or has relevance to the issues considered important) and needs of priority populations while improving familiarity and understanding of clean transportation, and develop customizable materials that reflect these messages.
- 5. Measure Outreach Efficacy:** Collaboratively develop a consistent and relatable set of qualitative and quantitative metrics for evaluating outreach efforts, and ensure outreach is streamlined and effectively improving clean transportation awareness, adoption, and program participation.



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# Background

The Clean Energy and Pollution Reduction Act of 2015 (Senate Bill 350, De León, Chapter 547, Statutes of 2015) established new clean energy, clean air and greenhouse gas emissions reduction goals for 2030 and beyond. In addition to the greenhouse gas emissions reduction targets across the energy and transportation sectors, SB 350 directed the California Air Resources Board (CARB) to examine the barriers low-income residents<sup>1</sup> must overcome to access clean transportation and mobility options (or clean transportation options<sup>2</sup>), and develop recommendations on how to increase access to clean transportation opportunities for low-income residents.

In February 2018, following a thorough public process to identify and understand clean transportation barriers, CARB released the SB 350 Low-Income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-Income Residents (Barriers Report)<sup>3</sup>. The Barriers Report identifies affordability, funding for clean transportation solutions, and a lack of awareness of clean transportation options as barriers. The Barriers Report also discusses community-specific barriers, including safety, convenience and access.

There is no single statewide solution to all the obstacles described in the Barriers Report since each community has unique needs. Barriers faced within a community depend on geographic, economic, demographic, or cultural and linguistic factors, as well as communication preferences. Since low-income residents often own older, more polluting cars, have fewer means to replace them, spend a large part of their income on transportation, and may not be aware of or have access to other mobility options, finding equitable transportation solutions and targeting resources to these residents is of utmost importance.

The Barriers Report presented recommendations to increase clean transportation access, and included steps CARB and other state agencies can take to address these barriers. CARB developed this Roadmap to further the second of the six priority recommendations<sup>4</sup> listed below.

- Expand Assessments of Low-Income Resident Clean Transportation and Mobility Needs
- **Develop an Outreach Plan Targeting Low-Income Residents (or Roadmap)**
- Develop Regional One-Stop-Shops to Increase Consumer Awareness and Technical Assistance
- Develop Guiding Principles for Grant and Incentive Solicitations
- Maximize Economic Opportunities and Benefits by Expanding Workforce Training and Development
- Expand Funding and Financing Opportunities Particularly for Low-income and Disadvantaged Communities

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1 Defined in Assembly Bill (AB) 1550 (Gomez, Chapter 369, Statutes of 2016) as census tracts with median household incomes at or below 80 percent of the statewide median income or with median household incomes at or below the threshold designated as low-income by the Department of Housing and Community Development's list of state income limits pursuant to Section 50093 of the Health and Safety Code.

2 Clean transportation include zero-emission and near zero-emission light-duty cars, trucks, transit buses, and school buses and supporting charging and fueling infrastructure, active transportation and supporting safe pedestrian sidewalks and bike facilities, and clean mobility options such as ride share, car share, bike share, and vanpools. Referred to broadly as Clean Transportation Options throughout the Roadmap.

3 California Air Resources Board. Low-Income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-Income Residents. Available at [arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350](http://arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350).

4 The status of CARB's Barrier Study recommendations is available at [arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350](http://arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350).



# Roadmap Purpose

This Roadmap suggests improvements to outreach and engagement efforts for residents living in low-income households within disadvantaged, rural, and California Native American Tribal communities<sup>5</sup>, where participation in clean transportation programs and investments has been limited. In addition to populations identified by the top 25 percent most impacted census tracts in CalEnviroScreen 3.0<sup>6</sup> and through AB 1550 Low-income Communities<sup>7</sup>, the Roadmap also considers other groups which may include, but are not limited to those identified in Figure 1. These populations include a range of groups who face the greatest vulnerabilities and disparities in the transportation system but also those who were inadvertently missed through standard outreach.

Often, conventional outreach and engagement methods do not serve the needs of priority populations. For example, English-written media (newspapers, email, and websites) may not be accessible, used, or even reach non-English speakers, or those without internet access. In addition, residents may feel uncomfortable attending a meeting or workshop held in government offices or find other features

## FIGURE 1: EXAMPLES OF PRIORITY POPULATIONS

Priority populations may include, but are not limited to:

- People of no- and low-income
- Disadvantaged communities
- California Native American Tribes
- People of color
- People with limited English proficiency
- People with disabilities and medical issues
- Children and seniors
- People who do not own cars or do not drive

uninviting – they may face challenges with finding transportation or childcare, or may work multiple jobs with a schedule that limits participation. The Roadmap, which acknowledges that “traditional” techniques can be less effective, identifies strategies that support three overarching objectives to streamline outreach to priority populations: strengthening partnerships, ensuring meaningful engagement with communities, and responding effectively to identify community needs (Figure 2).

Multiple perspectives improve clean transportation awareness and access for priority populations. Therefore, CARB created this Roadmap collaboratively with community advocates, clean transportation program administrators, and our agency partners.

## FIGURE 2: OUTREACH ROADMAP OBJECTIVES



5 Defined in CARB’s Tribal Consultation Policy (October 2018) as either a federally-recognized California tribal government listed on the most recent notice of the Federal Register or a non-federally recognized California tribal government, including those listed on the California Tribal Consultation List maintained by the California Native American Heritage Commission (NAHC). Available at [arb.ca.gov/tribal-relations](http://arb.ca.gov/tribal-relations)

6 California Office of Environmental Health Hazard Assessment. CalEnviroScreen 3.0. Available at [oehha.ca.gov/calenviroscreen/report/calenviroscreen-30](http://oehha.ca.gov/calenviroscreen/report/calenviroscreen-30)

7 AB 1550 Maps. Available at [ww3.arb.ca.gov/cc/capandtrade/auctionproceeds/kml/ab1550\\_maps\\_documentation.pdf](http://ww3.arb.ca.gov/cc/capandtrade/auctionproceeds/kml/ab1550_maps_documentation.pdf)

# Intended Audience

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The Roadmap supports federal, state and local agencies, and other outreach partners that regularly engage priority populations. Outreach partners are groups that can distribute materials, provide a forum to help deliver key messages, and help improve clean transportation awareness and program participation. For the purposes of this Roadmap, outreach partners involve three categories:

- **Government** includes federal, state, regional and local agencies, including Metropolitan Planning Organizations (MPOs), transit agencies, and local air quality districts.
- **Program administrators** (PAs) include the organizations (often government and/or nonprofits) that implement clean transportation incentive and outreach programs (namely Low-Carbon Transportation Investments or LCTI).
- **Community-based organizations** (CBOs) include local entities that represent the community's interest, have close ties to their respective community and a firm grasp of community needs and how to engage them effectively.

CARB envisions outreach as a coordinated effort with program administrators (including local governments and air districts) and CBOs at the forefront in interacting with priority populations, with state agencies' support through training, funding and other resources. In turn, CBOs are better able to relay community-specific information that can help improve clean transportation program design and tailor outreach that truly serves community needs.

# Implementation Plans

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The tasks and outcomes identified for each strategy involve understanding both past and future planned outreach efforts. CARB is developing an implementation plan with more specificity, including a work plan and implementing agencies, to complement the Roadmap.

## Strategy 1: Outreach Landscape Assessment

### Objectives:

- Develop tools to understand the universe of current and past outreach efforts;
- Identify outreach strategy gaps, including gaps in information and materials;
- Understand and learn from past outreach successes and challenges;
- Identify new opportunities, including new and unlikely outreach partnerships, and innovative ways to reach priority populations; and
- Develop approaches to align, standardize, and coordinate statewide outreach.

**Why this matters:** By performing a landscape assessment of education and outreach programs, CARB can pool resources and develop a common message among outreach providers. This, in part, helps minimize conflicting or duplicative messaging and creates other opportunities to share and learn from past engagement efforts. Most importantly, CARB wants to avoid burdening communities with frequent, uncoordinated outreach. Knowing the landscape of outreach programs and providers is the first step to aligning and leveraging outreach, and provides important lessons to put into practice, including:

- How targeting priority populations is different from broader engagement;
- How to integrate outreach methods that benefit communities; and
- How to foster collaboration among outreach providers and community groups

**TABLE 1: STRATEGY 1 RECOMMENDATIONS**

Recommendation	Tasks	Outcomes
<p><b>Recommendation 1A:</b> Compile Clean Transportation Program &amp; Associated Outreach Information</p>	<ul style="list-style-type: none"> <li>• Collect and compile data for outreach providers including clean transportation opportunities (programs, services, incentives, etc.) by State, regional, and local entities. Identify program criteria, geographic extent, target audience, outreach types/activities, program uptake rates by priority populations, and potential for leveraging.</li> <li>• Compile outreach data: materials, delivery methods, and performance measures. Identify and build upon similar collection activities.</li> </ul>	<ul style="list-style-type: none"> <li>• Database and/or matrices: Available programs and associated outreach programs</li> <li>• Maps: Program coverage, participation rates among priority populations, and location of past outreach activities</li> <li>• Analysis for outreach gaps and a plan for how to prioritize future outreach efforts</li> <li>• Place resources on sharing platform (Recommendation 2D) to inform outreach providers of current efforts</li> </ul>
<p><b>Recommendation 1B:</b> Increase Understanding of Effective Outreach &amp; Characteristics</p>	<ul style="list-style-type: none"> <li>• Review outreach programs that target similar priority populations, such as Covered California, for practices, successful approaches and performance measures (including characteristics that define what outreach success looks like).</li> <li>• Survey outreach providers to identify successful and appropriate outreach strategies.</li> <li>• Survey outreach providers to analyze past outreach activities, identify gaps in outreach strategies, and prioritize future efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• Outreach literature review that identifies successful approaches to inform planning efforts</li> <li>• Outreach provider survey and results</li> <li>• Analysis of existing outreach gaps, including information and materials</li> <li>• Outreach prioritization and opportunities plan that informs future outreach efforts</li> <li>• Collection of resources on sharing platform (Recommendation 2D) to inform outreach providers of outreach priorities</li> </ul>

Recommendation	Tasks	Outcomes
<p><b>Recommendation 1C:</b> Outreach Provider Alignment, Lessons Learned, Best Practices Guide</p>	<ul style="list-style-type: none"> <li>• Develop a collaborative approach to help outreach partners align clean transportation messaging/material development, improve community engagement strategies, and coordinate activities and outreach performance measures.</li> <li>• Compile training opportunities to improve outreach competency among agency leadership, staff, program administrators, and CBOs.</li> <li>• Integrate guidance into the outreach component of LCTI solicitations.</li> <li>• Evaluate competitive solicitations scoring criteria related to outreach costs and budgets.</li> </ul>	<ul style="list-style-type: none"> <li>• Outreach provider alignment tools, including: alignment best practices, outreach provider lessons learned, key outreach messages (Recommendation 4A), environmental justice principles, cultural, social and outreach training</li> <li>• Outreach best practices reference guide with meaningful engagement strategies, tips for effective meeting facilitation, and outreach metric evaluation forms (Recommendation 5A)</li> <li>• Annual outreach provider summit highlighting program successes, challenges and identified best practices, lessons learned, and future outreach prioritization</li> <li>• Grant/solicitation language outlining outreach requirements for program administrators</li> <li>• Grant and solicitation budget information guidance and scoring criteria recommendations</li> </ul>

## Strategy 2: Strengthen, Build and Maintain Partnerships

### Objectives:

- Create and strengthen collaborative relationships among outreach partners to improve outreach coordination and task/material development; and
- Provide sustainable and long-term support to CBOs for direct community engagement.

**Why this matters:** Partnerships with a variety of outreach partners enable the sharing of knowledge and resources and support broader dissemination. This can improve outreach effectiveness and coverage. Improved coordination among government and other organizations that provide services to priority populations has the potential to reduce duplicative efforts, which can confuse or overwhelm communities. By building and strengthening partnerships with organizations that offer a range of benefits or services, CARB can:

- Leverage existing networks, share lessons learned and resources, minimize redundancies, and collaborate on the development and delivery of educational materials/messages;
- Create opportunities for greater impact and resource efficiency;
- Engage community groups that are most familiar with California’s most difficult to serve populations and those most familiar with priority populations’ transportation needs; and,
- Focus on developing and strengthening relationships, convening outreach providers, and supporting capacity building.

**TABLE 2: STRATEGY 2 RECOMMENDATIONS**

Recommendation	Tasks	Outcomes
<p><b>Recommendation 2A:</b> Coalition of State, Regional &amp; Local Outreach Partner Providers</p>	<ul style="list-style-type: none"> <li>• Establish a partnership coalition among state agencies and program administrators.</li> <li>• Facilitate and coordinate tools, training, funding, and resources to outreach providers.</li> <li>• Ensure outreach providers have access to outreach resources.</li> </ul>	<ul style="list-style-type: none"> <li>• A partnership agreement identifying purpose, roles and responsibilities and focuses on trust building, knowledge sharing, and fostering partnership opportunities</li> <li>• List of existing outreach partners and partnership opportunities</li> <li>• Regular coordination meetings/forum to discuss upcoming events, material development and alignment/leverage opportunities</li> <li>• Collection of resources, meetings, and partnership opportunities and events on sharing platform</li> </ul>
<p><b>Recommendation 2B:</b> CBO Support &amp; Technical Assistance</p>	<ul style="list-style-type: none"> <li>• Identify and partner with CBOs.</li> <li>• Assess CBO needs (each organization has different technical/ financial capacities).</li> <li>• Provide partner CBOs with the tools, resources, and long-term funding to conduct outreach on clean transportation incentive programs, technologies, and services in their respective community.</li> <li>• Build capacity of CBOs to participate in clean transportation projects by facilitating project partners and providing help with applications.</li> </ul>	<ul style="list-style-type: none"> <li>• CBO capacity assessment questionnaire/survey</li> <li>• Train-the-trainer program</li> <li>• Long-term funding stipends and agreements for CBOs to conduct community outreach</li> <li>• Outreach support from CARB and project administrators</li> <li>• Project partner facilitation (in-person and online networking opportunities)</li> <li>• Direct application assistance</li> </ul>

Recommendation	Tasks	Outcomes
<b>Recommendation 2C:</b> Stakeholder & CBO Directory	<ul style="list-style-type: none"> <li>• Build a shareable statewide directory of stakeholders and CBOs (with parameters of how to obtain, use, add and update an organization's information in the directory).</li> <li>• Include key organization information (i.e. geographic reach, mission, population served, etc.) with filter, sort and data transfer functions.</li> <li>• Leverage existing tools and determine level of access (public or limited to outreach providers).</li> </ul>	<ul style="list-style-type: none"> <li>• A searchable directory of organization information</li> <li>• Expanded network to disseminate information and partnership building opportunities</li> </ul>
<b>Recommendation 2D:</b> Sharing Platform	<ul style="list-style-type: none"> <li>• Create an online platform for outreach partners to share, outreach materials to improve information access and coordination.</li> <li>• Highlight the outreach that has occurred and the status of the program/implementation.</li> </ul>	<ul style="list-style-type: none"> <li>• A web portal for communication, event sharing, outreach material repository, and to report outreach outcomes</li> </ul>

## Strategy 3: Engage Priority Populations to Identify Outreach and Transportation Needs

### Objectives:

- Build on Barriers Report recommendation to expand community assessments;
- Leverage CBOs' community knowledge to improve understanding of outreach and transportation needs;
- Ensure needs assessments involve meaningful community engagement; and
- Develop methods to share and integrate community-identified needs into CARB-led projects including transportation incentive programs.

**Why this matters:** Understanding the full range of a community's needs, strengths, assets, and transportation goals, as well as the historic decisions that led to transportation system inequities, enables government to create fair and responsive policies, programs, and outreach plans. CBOs, when provided the necessary tools and resources, can help identify outreach needs, which would then allow other outreach partners (i.e. government and program administrators) to better design programs and tailor statewide outreach to include community-specific characteristics.

Assessing transportation needs provides valuable outreach information including best delivery methods and appropriate messaging. For example, CBOs can help outreach partners understand whether communities already know that a program/service exists, are willing to use it (e.g. are there norms or values held by residents that may limit participation, if more inclusive approaches are not used), and are able to use it (i.e. have access).

**TABLE 3: STRATEGY 3 RECOMMENDATIONS**

Recommendation	Tasks	Outcomes
<p><b>Recommendation 3A:</b> Develop Process &amp; Guidance for Community Transportation Needs Assessments</p>	<ul style="list-style-type: none"> <li>• Develop a process to assess community transportation needs and resources.</li> <li>• Process to consider what information/data is available (spatial, categorical, and numerical data), information that is needed and gaps in community needs/desires, methods for assessing needs and public engagement strategies.</li> </ul>	<ul style="list-style-type: none"> <li>• A community needs assessment guidance document that complements existing guidance resources and establishes minimum standard requirements</li> <li>• A public/community engagement action plan</li> <li>• Identification of long-term community engagement funding</li> </ul>
<p><b>Recommendation 3B:</b> Procedure for Integrating Needs Assessment Process into CARB grants and programs</p>	<ul style="list-style-type: none"> <li>• Identify CARB (or state-level) projects being planned or implemented in communities.</li> <li>• Develop and share strategies that identify mechanisms for incorporating process (for identifying needs) into relevant, related program guidelines and transportation plans.</li> </ul>	<ul style="list-style-type: none"> <li>• Action plan on how to integrate assessment process into CARB programs</li> <li>• Guided questions that will accompany CARB grants and solicitations to assess how clean transportation project addresses community-identified needs and community involvement</li> </ul>
<p><b>Recommendation 3C:</b> Pilot Community Transportation Needs Assessments Process</p>	<ul style="list-style-type: none"> <li>• Pilot process (Recommendation 3A) whereby CBOs assess community transportation needs.</li> <li>• Refine process based on outcomes and CBO feedback.</li> <li>• Identify and develop tools/resources to improve and simplify a CBOs ability to conduct assessments with ease.</li> </ul>	<ul style="list-style-type: none"> <li>• A series of small-scale, community-level transportation (and outreach) needs assessments conducted by CBOs</li> <li>• Toolkit for CBOs that offers a collection of transportation assessments, guidance, best practices, and advocacy tools including next steps, and how to use assessments</li> <li>• Tools such as a database of transportation plans and guided checklists that help communities and agencies take actions that improve access based on need</li> </ul>

## Strategy 4: Develop Consistent Outreach Messaging & Materials

### Objectives:

- Develop and incorporate consistent and meaningful outreach messages that speak to the values (i.e. has relevance to the issues considered important) and needs of priority populations while improving familiarity and understanding of clean transportation;
- Coordinate with outreach provider coalition and CBOs to align messaging; and
- Customizable outreach materials of available statewide and/or region-specific clean transportation programs.

**Why this matters:** The more emphasis on the benefits associated with clean mobility options—whether it is increased mobility and access, reduced costs, etc.—the more valuable clean transportation options will be to priority populations. By addressing the question, “How does this [clean transportation option] benefit me?” awareness can be improved, receptivity and ultimately adoption. Therefore, it is important to develop consistent messaging with clean transportation outreach providers.

Messages that communicate the benefits of increased mobility and complementary efforts (e.g. job training, housing, etc.) include:

- Improved access to economic opportunities (job training centers), medical and public health facilities, schools/after-school programs, early childhood development centers, parks, grocery stores, other daily needs, etc.;
- Comparison of vehicle ownership to other clean transportation options; and
- Health benefits of active lifestyles and improved air quality in reducing chronic diseases, from which priority populations suffer disproportionately.





**TABLE 4: STRATEGY 4 RECOMMENDATIONS**

Recommendation	Tasks	Outcomes
<p><b>Recommendation 4A:</b> Outreach Messaging Collection</p>	<ul style="list-style-type: none"> <li>• Develop key messages that connect clean transportation to multiple sectors and topics (environment, economic, social, health, etc.).</li> <li>• Ensure outreach messages and themes are based on community-identified transportation needs goals, values, interests/issues, etc.</li> <li>• Ensure messages align with project goals.</li> </ul>	<ul style="list-style-type: none"> <li>• Key outreach messages by topics and themes tailored to communities in different settings (i.e. urban, rural, and tribal) and are customizable</li> <li>• Matrix that defines values and goals for various clean transportation projects to identify relevant message/applicability</li> <li>• Case studies and testimonials</li> </ul>
<p><b>Recommendation 4B:</b> Outreach Alignment and Material Toolbox</p>	<ul style="list-style-type: none"> <li>• Develop outreach materials based on gaps that allow outreach partners to include a broader scope of programs and/or generally available transportation amenities and programs.</li> <li>• Centralize resources that outreach providers can pull from to simplify outreach material development to support consistency and promote alignment.</li> </ul>	<ul style="list-style-type: none"> <li>• Customizable materials that allow for the addition of location-specific incentive programs (such as charging incentives, etc.)</li> <li>• Glossary of acronyms, words and phrases</li> <li>• Outreach style guide developed in coordination with community of practice and community groups most familiar with California’s most difficult to serve populations</li> <li>• Graphics and logo guidelines hub</li> <li>• Translation process and services guidance</li> <li>• Material distribution strategies and best practices</li> </ul>
<p><b>Recommendation 4C:</b> Educational Materials</p>	<ul style="list-style-type: none"> <li>• Compile (and develop as needed) materials and activities that more broadly educate residents about clean transportation options and their benefits, including improved public health.</li> <li>• Ensure materials have varying levels of educational information (i.e. introductory or basic, intermediate, and advanced or detailed).</li> </ul>	<ul style="list-style-type: none"> <li>• Clean transportation technology FAQs and “myth busters”</li> <li>• Car buying guide resources</li> <li>• Air Quality Education for Children (e.g. updated Kid Zone)</li> </ul>

## Strategy 5: Measure Outreach Efficacy

### Objectives:

- Build on the Barriers Report's additional recommendation to develop metrics to measure and track progress in increasing access for priority populations over time;
- Collaboratively develop a consistent and relatable set of qualitative and quantitative metrics for evaluating outreach efforts; and
- Ensure outreach is streamlined and effectively improving clean transportation awareness and program participation.

**Why this matters:** Outreach can be more challenging among priority populations because conventional outreach methods done by large agencies are usually not as effective as they could be. Instead, outreach providers must pursue more grassroots techniques, such as developing relationships with trusted community leaders and organizations, holding meetings at varying hours and locations to promote attendance, and providing services that support attendance (transportation, translation, etc.). Outreach needs often vary from one type of community to the next, which is why it is important to understand each community's characteristics. Measuring program outreach effectiveness and uptake is essential toward monitoring, evaluating, and improving community outreach strategies and making sure efforts lead to an increase in information access, awareness, and ultimately, program participation and clean mobility acceptance.

Developing metrics is a crucial step in holding agencies accountable while also ensuring increased access and benefits are realized over time within priority populations. This effort involves close interagency coordination and collaboration with CBOs, as well as the academic community, such as state universities and colleges, and community colleges. The State, with input from regional and local outreach partners, is ideally positioned to collect data on the successes of various outreach strategies and share this information with CBOs. In turn, CBOs can relay community-specific information to help design tailored outreach and programs that truly serve community needs. CARB can then share this information and use it to improve existing approaches while also informing future efforts.



**TABLE 5: STRATEGY 5 RECOMMENDATIONS**

Recommendation	Tasks	Outcomes
<p><b>Recommendation 5A:</b> Community Engagement Evaluations</p>	<ul style="list-style-type: none"> <li>• Evaluation of awareness both before and after engagement activities.</li> <li>• Develop an evaluation for community residents to rate engagement efforts.</li> <li>• Ensure inclusion of key elements — how the participant rates the quality of information received, event facilitation, if event was held in an open/ transparent way and encouraged input.</li> <li>• Incentivize responses by compensating residents/ communities for engagement and participation.</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation form that assesses:               <ul style="list-style-type: none"> <li>• If engagement effort was useful and meaningful;</li> <li>• Whether outcomes were responsive to identified community needs (Strategy 3); and,</li> <li>• How participant input is used (or will be used).</li> </ul> </li> <li>• Identified and set-aside long-term funding to pay residents and communities for participation and engagement</li> </ul>
<p><b>Recommendation 5B:</b> Develop Metrics &amp; Conduct Evaluations to Track Outreach Progress</p>	<ul style="list-style-type: none"> <li>• Develop standardized outreach metrics to evaluate clean transportation program outreach effectiveness.</li> <li>• Consider a variety of indicators including, instances of collaboration with stakeholders and partnership activities, event tracking and community input, shifts in awareness and perspectives, program participation rates among priority population, participant stories, adoption rates, etc.</li> <li>• Make sure programs are responsive to evaluations of their outreach efforts and update outreach accordingly.</li> </ul>	<ul style="list-style-type: none"> <li>• Quantitative metrics (i.e. number of community events, press events, frequency of one-on-one interactions, communications, etc.)</li> <li>• Qualitative metrics (i.e. focus groups, interviews, participant testimonials, etc.)</li> <li>• Program evaluation checklist (are the activities improving awareness and access and have the appropriate indicators been identified to measure success)</li> <li>• Metrics-focused transportation research conducted by third-party evaluators, such as academic institutions, in collaboration with community-based organizations and community members</li> </ul>
<p><b>Recommendation 5C:</b> Outreach Progress Visualization/ Tracking Tool</p>	<ul style="list-style-type: none"> <li>• Publicly display frequency and geographic spread of outreach efforts.</li> <li>• Report frequency of outreach visits that occur within priority communities.</li> <li>• Develop ways to represent the information visually to display progress but also identify opportunities for improvement.</li> </ul>	<ul style="list-style-type: none"> <li>• Outreach event tracker</li> <li>• Outreach map of current activities</li> <li>• Story map of outreach impacts</li> </ul>

## Funding & Resource Needs

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In order to meet community outreach needs and increase clean transportation awareness and uptake, more funding and resources are necessary. Some key considerations include:

- CBOs need adequate resources to participate in and facilitate local outreach efforts identified in this Roadmap. CARB plans to look into existing and new efforts that can better support the work of CBOs.
- To implement the statewide strategies identified in the Roadmap, CARB must revisit and potentially augment outreach roles. This may require additional future resources to help ensure partnerships and regional support efforts can materialize and endure.
- Consider the full spectrum of resources and costs required to accommodate the development of materials, toolkits, online resources, and fund outreach pilot projects.
- Program administrators also need additional resources to implement the strategies identified in this Roadmap.

## Next Steps

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Many recommendations outlined in this document are underway (this information will be included in the implementation plan) and the Roadmap serves to identify additional elements that would help further improve access and awareness of clean transportation options for priority populations.

However, in order for this document to successfully bridge the clean transportation awareness and information accessibility gap and streamline outreach for priority populations, it is crucial that stakeholders review the contents of this plan and provide feedback. Concurrently, CARB is developing an implementation plan for each recommendation that identifies timelines and leading agencies.

Next steps for the Outreach Roadmap include:

- Develop draft implementation work plan for Roadmap activities.
- Release implementation work plan.
- Provide semi-annual updates of implementation efforts.



# Appendix A

**TABLE 6: COMPLEMENTARY & RELATED EFFORTS**

The following table identifies complementary efforts and program leveraging opportunities for each Roadmap strategy.

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CalRecycle	California Education and the Environment Initiative <a href="http://californiaeei.org/">californiaeei.org/</a>	X	X		X	
CalEPA	Environmental Justice Program <a href="http://arb.ca.gov/our-work/topics/environmental-justice">arb.ca.gov/our-work/topics/environmental-justice</a>	X	X			
CalEPA	California Native American Tribal Relations <a href="http://calepa.ca.gov/tribal/">calepa.ca.gov/tribal/</a>	X				
Caltrans	Expand Assessments of Low-Income Resident Clean Transportation and Mobility Needs (Barriers Report)	X		X	X	
Caltrans	Active Transportation Program (ATP) <a href="http://dot.ca.gov/programs/local-assistance/fed-and-state-programs/active-transportation-program">dot.ca.gov/programs/local-assistance/fed-and-state-programs/active-transportation-program</a>	X		X		X

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
Caltrans	California Transportation Plan <a href="https://dot.ca.gov/programs/transportation-planning/state-planning/california-transportation-plan">dot.ca.gov/programs/transportation-planning/state-planning/california-transportation-plan</a>	X		X		X
Caltrans	Native American Advisory Committee (NAAC) <a href="https://dot.ca.gov/programs/transportation-planning/state-planning/nalb/native-american-advisory-committee">dot.ca.gov/programs/transportation-planning/state-planning/nalb/native-american-advisory-committee</a>	X	X	X	X	X
Caltrans	Statewide Transit Strategic Plan <a href="https://dot.ca.gov/programs/rail-and-mass-transportation/statewide-transit-strategic-plan">dot.ca.gov/programs/rail-and-mass-transportation/statewide-transit-strategic-plan</a>	X	X	X		X
CARB	Best Practices for Community Engagement and Building Successful Projects: A Summary from the 2018 Community Leadership Summit <a href="https://arb.ca.gov/cc/capandtrade/auctionproceeds/ci-community-leadership-bestpractices.pdf">arb.ca.gov/cc/capandtrade/auctionproceeds/ci-community-leadership-bestpractices.pdf</a>	X				
CARB	Environmental Justice Advisory Committee <a href="https://arb.ca.gov/cc/ejac/ejac.htm">arb.ca.gov/cc/ejac/ejac.htm</a>		X			

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CARB	SB 375 Sustainable Communities Program <a href="http://ww2.arb.ca.gov/our-work/topics/sustainable-communities">ww2.arb.ca.gov/our-work/topics/sustainable-communities</a>		X			
CARB	California Climate Investments (CCI) <a href="http://caclimateinvestments.ca.gov/">caclimateinvestments.ca.gov/</a>	X	X	X	X	X
CARB	CCI's "Community Connections" Tool (Internal Resource)		X			
CARB	CCI Funding Guidelines for Administering Agencies <a href="http://arb.ca.gov/resources/documents/ci-funding-guidelines-administering-agencies">arb.ca.gov/resources/documents/ci-funding-guidelines-administering-agencies</a>					X
CARB	SB 375 Sustainable Communities & Climate Protection Program <a href="http://arb.ca.gov/our-work/programs/sustainable-communities-climate-protection-program">arb.ca.gov/our-work/programs/sustainable-communities-climate-protection-program</a>			X		

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CARB	2018 Progress Report: California's Sustainable Communities and Climate Protection Act (SB 150/SB 375) <a href="http://arb.ca.gov/sites/default/files/2018-11/Final2018Report_SB150_112618_02_Report.pdf">arb.ca.gov/sites/default/files/2018-11/Final2018Report_SB150_112618_02_Report.pdf</a>				X	X
CARB	Clean Mobility in Schools Pilot Project (Solicitation Documents/ Closed) <a href="http://arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low">arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low</a>		X		X	
CARB	Heavy-Duty Demonstration Projects in Action <a href="http://arb.ca.gov/msprog/lct/projectheavyduty.htm">arb.ca.gov/msprog/lct/projectheavyduty.htm</a>	X	X	X	X	X
CARB	SB 498 Report: Policy Recommendations to Improve ZEV Programs <a href="http://arb.ca.gov/resources/documents/public-workshop-discuss-policy-recommendations-improve-zero-emission">arb.ca.gov/resources/documents/public-workshop-discuss-policy-recommendations-improve-zero-emission</a>	X	X	X	X	X



Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CARB	LCTI and AQIP Programs and Funding Plans <a href="http://arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low-1">arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low-1</a>	X	X	X	X	X
CARB	One-Stop-Shop to Increase Consumer Awareness Pilot	X	X	X	X	X
CARB	Develop Guiding Principles for Grant and Incentive Solicitations (Barriers Report)	X	X			
CARB	Develop Metrics, Measure Progress, and Coordinate Program Metrics (Barriers Report)		X			X
CARB	ZEV Program – 2018 ZEV Action Plan: Priorities Update <a href="http://arb.ca.gov/our-work/programs/zero-emission-vehicle-program">arb.ca.gov/our-work/programs/zero-emission-vehicle-program</a>	X	X	X	X	X
CARB	AB 32 Scoping Plan <a href="http://arb.ca.gov/cc/scopingplan/scopingplan.htm">arb.ca.gov/cc/scopingplan/scopingplan.htm</a>	X				
CARB	AB 617 Community Air Protection Program <a href="http://arb.ca.gov/our-work/programs/community-air-protection-program">arb.ca.gov/our-work/programs/community-air-protection-program</a>	X	X	X	X	X

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CARB	AB 617 Community Air Grants <a href="http://arb.ca.gov/our-work/programs/community-air-protection-program/community-air-grants">arb.ca.gov/our-work/programs/community-air-protection-program/community-air-grants</a>		X	X		X
CARB	LCTI Outreach & Moving California <a href="http://arb.ca.gov/movingca">arb.ca.gov/movingca</a>	X	X	X	X	X
CARB	ZEV Marketing Strategies - DriveClean <a href="http://driveclean.ca.gov/">driveclean.ca.gov/</a>	X	X		X	
CARB	CCI Foundation for Community Colleges Outreach Contract <a href="http://caclimateinvestments.ca.gov/priority-populations">caclimateinvestments.ca.gov/priority-populations</a>		X		X	
CARB	Clean Cars 4 All (Implemented by Air Districts) <a href="http://arb.ca.gov/our-work/programs/clean-cars-4-all">arb.ca.gov/our-work/programs/clean-cars-4-all</a>	X	X	X	X	X
CARB/BSF	Clean Vehicle Assistance Program (Statewide Financing Assistance) <a href="http://cleanvehiclegrants.org/">cleanvehiclegrants.org/</a>	X	X	X	X	X
CARB/Calstart	Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) <a href="http://californiahvip.org/">californiahvip.org/</a>	X	X	X	X	X

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CARB/CHDC	Driving Clean Assistance Program (Bay Area & Sacramento) <a href="http://arb.ca.gov/msprog/lct/vehiclefinancing.htm">arb.ca.gov/msprog/lct/vehiclefinancing.htm</a>	X	X	X	X	X
CARB/CSE	Clean Vehicle Rebate Project (CVRP) Outreach Event Map <a href="http://cleanvehiclerebate.org/eng/event-map">cleanvehiclerebate.org/eng/event-map</a>		X	X	X	X
CARB/CSE	Clean Vehicle Rebate Project (CVRP) <a href="http://cleanvehiclerebate.org/eng">cleanvehiclerebate.org/eng</a>	X	X	X	X	X
CDPH	California Building Resilience Against Climate Effects (CalBRACE) - Access and Equity Indicators <a href="http://cdph.ca.gov/Programs/OHE/Pages/CC-Health-Vulnerability-Indicators.aspx">cdph.ca.gov/Programs/OHE/Pages/CC-Health-Vulnerability-Indicators.aspx</a>					X
CEC	Energy Equity Indicators Mapping Tool <a href="http://energy.ca.gov/rules-and-regulations/energy-suppliers-reporting/clean-energy-and-pollution-reduction-act-sb-350-3">energy.ca.gov/rules-and-regulations/energy-suppliers-reporting/clean-energy-and-pollution-reduction-act-sb-350-3</a>	X		X		X

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
CEC/CPUC	Disadvantaged Communities Advisory Group (DACAG) <a href="http://cpuc.ca.gov/DACAG/">cpuc.ca.gov/DACAG/</a>		X			
CPUC	Long Term Energy Efficiency Strategic Plan <a href="http://cpuc.ca.gov/General.aspx?id=4125">cpuc.ca.gov/General.aspx?id=4125</a>					X
CPUC	Environmental Social Justice Action Plan <a href="http://cpuc.ca.gov/CPUCNews/Detail.aspx?id=6442461331">cpuc.ca.gov/CPUCNews/Detail.aspx?id=6442461331</a>		X		X	
CWDB	Jobs, Equity, and California Climate Policy: A High Road Approach to SB 350 and AB 398 <a href="http://cwdb.ca.gov/wp-content/uploads/sites/43/2018/06/CWDB-398-Meetings-Overview.pdf">cwdb.ca.gov/wp-content/uploads/sites/43/2018/06/CWDB-398-Meetings-Overview.pdf</a>	X	X	X	X	X
Greenlining	Mobility Equity Framework: How to Make Transportation Work for People <a href="http://greenlining.org/wp-content/uploads/2019/01/MobilityEquityFramework_8.5x11_v_GLI_Print_Endnotes-march-2018.pdf">greenlining.org/wp-content/uploads/2019/01/MobilityEquityFramework_8.5x11_v_GLI_Print_Endnotes-march-2018.pdf</a>			X	X	X

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
Greenlining	Making Equity Real in Mobility Pilots Toolkit <a href="https://greenlining.org/wp-content/uploads/2019/08/Toolkit_Making-Equity-Real-in-Mobility-Pilot-Projects_Final-1.pdf">greenlining.org/wp-content/uploads/2019/08/Toolkit_Making-Equity-Real-in-Mobility-Pilot-Projects_Final-1.pdf</a>	X	X	X	X	X
Greenlining	Electric Vehicles for All: An Equity Toolkit <a href="https://greenlining.org/publications/online-resources/2016/electric-vehicles-equity-toolkit/">greenlining.org/publications/online-resources/2016/electric-vehicles-equity-toolkit/</a>		X	X	X	X
Liberty Hill	Green Zones and Grassroots Report <a href="https://libertyhill.org/news/reports/green-zones-and-grassroots">libertyhill.org/news/reports/green-zones-and-grassroots</a>	X				
MTC	Metropolitan Transportation Commission's (MTC) Federal Performance Targets <a href="https://mtc.ca.gov/our-work/plans-projects/major-regional-projects/federal-performance-targets">mtc.ca.gov/our-work/plans-projects/major-regional-projects/federal-performance-targets</a>					X
Multi-agency	CCI Outreach Liaison Work Group		X		X	
Multi-agency	CALCOG Meetings & Activities with MPOs		X			

Agency or Entity	Related Effort	Landscape Assessment	Partnerships	Identify Needs	Messaging & Materials	Metrics
OEHHA	Policy on Consultation with California Tribes <a href="http://oehha.ca.gov/tribal-policy">oehha.ca.gov/tribal-policy</a>	X	X	X	X	
SGC	Technical Assistance CCI Technical Assistance Program <a href="http://sgc.ca.gov/programs/tech/">sgc.ca.gov/programs/tech/</a>	X	X	X	X	X
SGC	Affordable Housing and Sustainable Communities <a href="http://sgc.ca.gov/programs/ahsc/">sgc.ca.gov/programs/ahsc/</a>	X	X	X	X	X
SGC	SB 1072 Regional Climate Collaborative Program	X	X	X	X	X
SGC	Transformative Climate Communities <a href="http://sgc.ca.gov/programs/tcc/">sgc.ca.gov/programs/tcc/</a>	X	X	X	X	X
Transform	A Framework for Equity in New Mobility <a href="http://transformca.org/sites/default/files/A%20Framework%20for%20Equity%20in%20New%20Mobility_FINAL.pdf">transformca.org/sites/default/files/A Framework for Equity in New Mobility_FINAL.pdf</a>	X	X	X	X	X
Veloz	Electric for All <a href="http://veloz.org/">veloz.org/</a>	X	X	X	X	X



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