Statewide Clean Mobility Options Voucher Pilot Program

Public Work Group Meeting
2021 Implementation Manual Update

June 23, 2021

Welcome and Introductions

Today's Agenda

10:00 – 11:45 ***Program Background and Application Window 1 Outcomes***
- Welcome and Introductions
- Introduction to the Clean Mobility Options (CMO) Admin Team
- Program Background
- Application Window 1 Outcomes
- Window 1 Evaluation

11:45 – 12:30 ***Lunch Break***

12:30 – 2:30 ***Proposed Changes to Program Design***
- Presentation
- Breakout Discussions and Report-Outs
- Next Steps

Clean Mobility Options

Introduction to CMO Admin Team

Program Background

Clean Mobility Options

Program Goals

Improve access in disadvantaged and low-income communities 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 Senate Bill 350 Barriers Study recommendations

Clean Mobility Options

Clean Mobility Options are
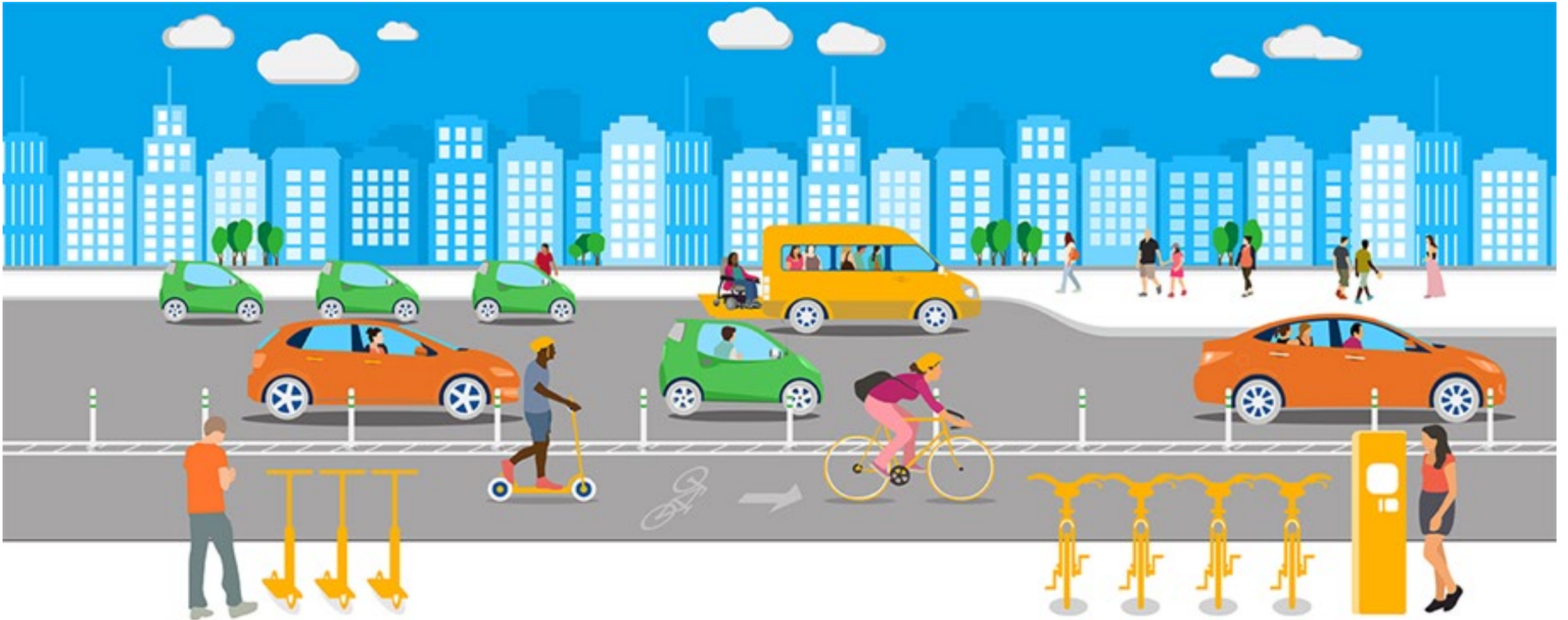*Zero-emissions shared mobility*

Image showing transportation modes in the Clean Mobility Options program

Image source: Society of Automotive Engineers

Why Zero-Emissions Shared Mobility?

- Offers greater flexibility for location, time and direction of travel where there is limited or no access to convenient bus or rail service

- Complements transit by transporting people between places and stops or stations

- Improves access to zero-emissions vehicles for those who may not be able to afford vehicles to meet their transportation needs

Clean Mobility Options

How Does the CMO Pilot Project Help Increase Shared Mobility?

Funding

- Mobility Project Vouchers (MPV)

- Community Transportation Needs Assessment (CTNA) Vouchers

Capacity Building

- Technical assistance

- Toolkits

- Information-sharing through the Clean Mobility Equity Alliance

Clean Mobility Options

Key Objectives

- Address mobility barriers common in under-resourced communities

- Streamline access to funds

- Support launch of "small-scale" projects

- Build capacity to support communities in achieving goals

- Support the financial sustainability of projects

Clean Mobility Options

Window 1 Funding: $21.15 Million (2020)

Needs Assessment Vouchers

- <u>Maximum Project Budget:</u> **$50,000**

- 9-month term & funding

- **$1.15 million** in needs assessment vouchers available

- $150,000 of total **set aside for tribal governments**

- **24 vouchers awarded**

Mobility Project Vouchers

- <u>Maximum Project Budget:</u> **$1 million**

- 5-year term (3 years of funding)

- **$20 million** in mobility project vouchers available

- $2 million of total **set aside for tribal governments**

- **21 vouchers awarded**

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Voucher Approach

- The voucher is a contract that serves as "promise of payment" between the Administrator and voucher recipients

- Vouchers are redeemed and payment is made on a reimbursement basis

Clean Mobility Options

Application Capacity Building

- Technical assistance (TA) tailored to applicant needs and delivered through many forms of communication and outreach. Window 1 TA included:
  - 1,100+ email inquiries to info@cleanmobilityoptions.org
  - 250+ online technical assistance cases
  - Hotline phone calls and follow emails/meetings
  - E-blasts sharing TA resources to 2,250+ individuals
  - Training sessions and webinars
  - Regional outreach forums and public work groups

- Tools include guidebooks, fact sheets, samples, templates, and a clean mobility provider directory

- Voucher applicants and awardees value technical assistance
  - Nearly two-thirds of applicants used TA for application development
  - **Over 88% found pre-application TA effective or very effective**
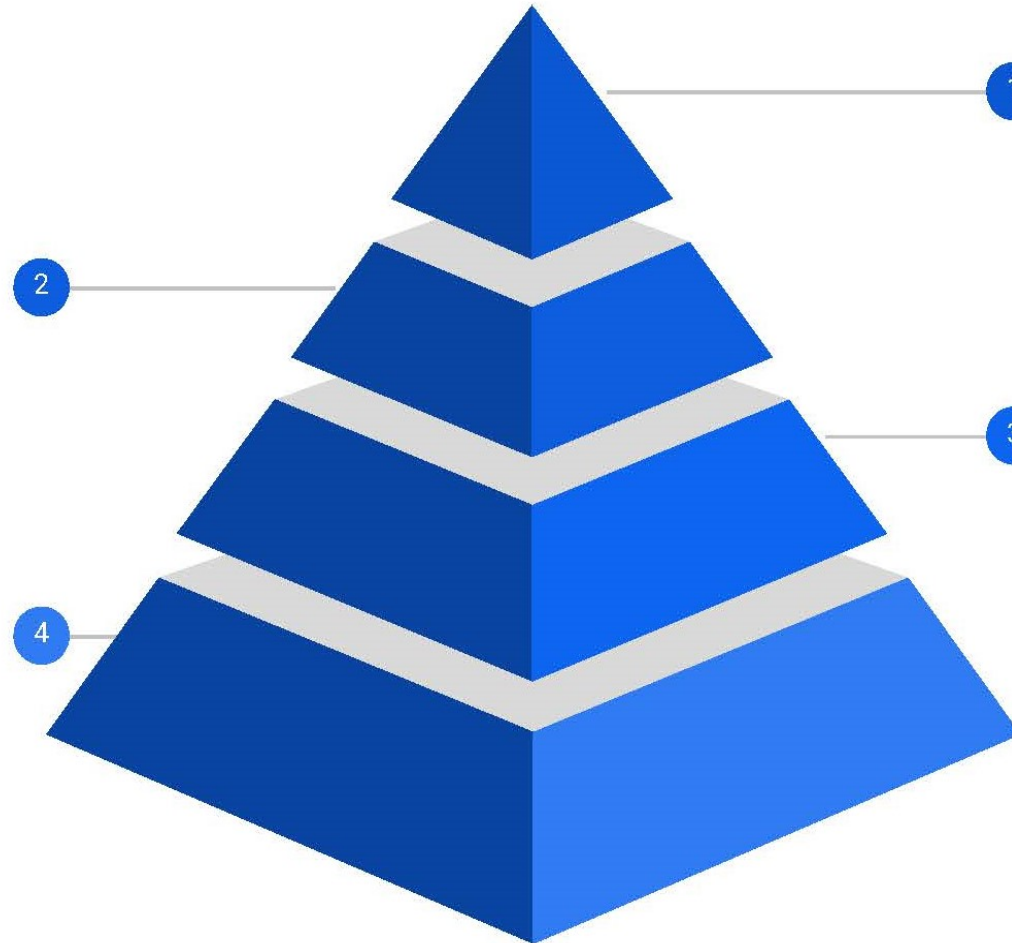 - Almost all voucher awardees use implementation TA and support

Clean Mobility Options

Implementation Capacity Building through the Clean Mobility Equity Alliance

One-on-One TA

Led by the Account Manager and supported by partners, each project team receives targeted TA based on specific needs and identified problems.

1

Peer-to-Peer Exchange

Targeted at small group discussions that yield meaningful results, peer-to-peer exchange effectively happens within but also between cohorts.

2

Capacity Building Training

Facilitated through larger meetings, training on specific topics allow for broad dissemination and equal access to experts and materials.

3

Capacity Building Tools

A comprehensive library of guides, fact sheets, and templates developed with the CMO program goals in mind, serving as a catalog of information for project teams to absorb and access at their own pace.

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Application Window 1 Outcomes

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Program Timeline - Application Windows

January to
late-Summer 2021   Fall 2021   Late Fall/Winter 2021   2022

Window 2
Program Design
Outreach and Analysis

Implementation
Manual published in
late-Summer

Window 1
Awardee Onboarding

Window 2
Application Outreach &
Capacity Building

Window 1
Implementation

Window 2
Application Window
Opens

Window 1
Implementation

Windows 1 & 2
Implementation

Clean Mobility Options

Window 1 Application Results

Demand far outweighs funding supply for Clean Mobility Options Vouchers

Voucher Type	# Applications Received	Funding Demand	Funding Available	# Applications Awarded
Needs Assessment	41	$1,939,483	$1,150,000	24
Mobility Project	33	$31,864,625	$20,000,000	21

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Needs Assessment Voucher Award Summary

$1.15 Million Total Funding

- Up to $50,000 per award

- 41 applications received from 19 counties

- 24 awarded across 14 counties
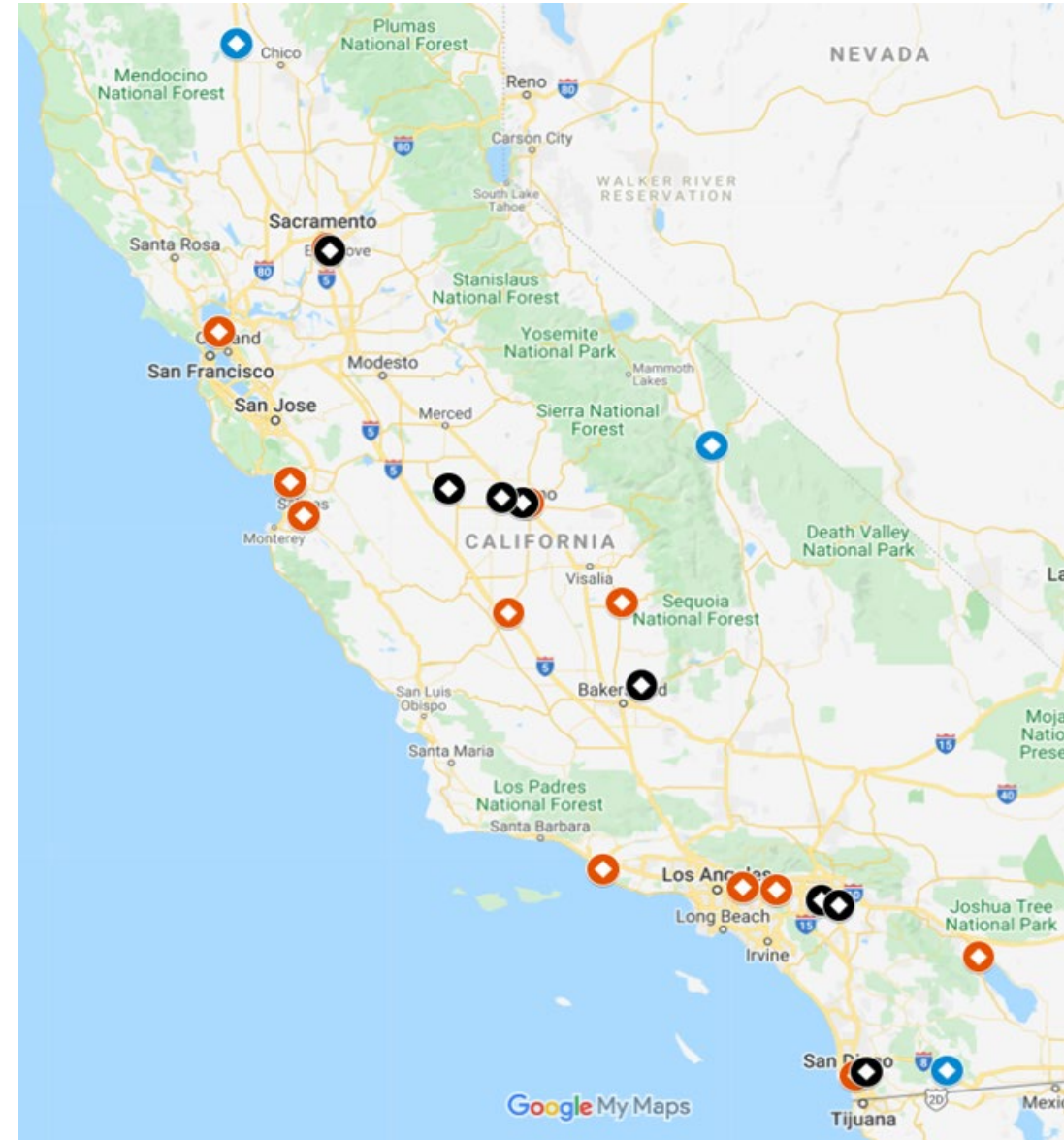 - 8 Public Agencies
  - 13 Nonprofits
  - 3 Tribes

Legend:

Tribes ◆

Nonprofits ◆

Public Agencies ◆

CTNA Organizations

Public Agency

- City of Fresno DOT Fresno Area Express
- County of San Diego
- Fresno County Rural Transit Authority
- Kern COG
- Porterville Unified School District
- Riverside Community College District
- Sacramento Public Library
- Western Riverside COG
- Fresno County Rural Transit Agency
- City of Reedley
- Anaheim Transportation Network
- City of National City
- City of Richmond

Tribe

- Native American Env. Protection Coalition
- Big Pine Paiute Tribe of the Owens Valley
- Paskenta Band of Nomlaki Indians

Legend:
■ CTNA Applicant
■ CTNA Awardee

- ActiveSGV
- BikeVentura
- CHERP - Locally Green Power
- Community Resource Project
- Ecology Action
- Fresno Economic Opportunities Commission
- Fresno Metro Ministry
- Social Good Fund/Regeneración Pajaro Valley
- The Latino Equity Advocacy & Policy Institute (3)
- Urban Collaborative Project
- Youth Transportation Organization
- Bike Bakersfield
- Bakersfield Senior Center, Inc.
- Kounkuey Design Initiative
- California State University, Fresno Foundation
- Electric Transportation Community Development
- South Los Angeles Transit Empowerment Zone
- Institute for Local Government
- Madera Coalition for Community Justice
- National Community Renaissance of California
- RiderSafety Visibility
- Spanish Speaking Unity Council
- Acterra

Nonprofit

CTNA Applicant
CTNA Awardee

Mobility Project Voucher Award Summary

$20 Million Total Funding

- Up to $1 million per award

- 33 applications received from 14 counties

- 21 awarded across 11 counties
    - 11 Public Agencies
    - 8 Nonprofits
   - 2 Tribes

Legend:

Tribes ◆

Nonprofits ◆

Public Agencies ◆

MPV Organizations

Public Agency
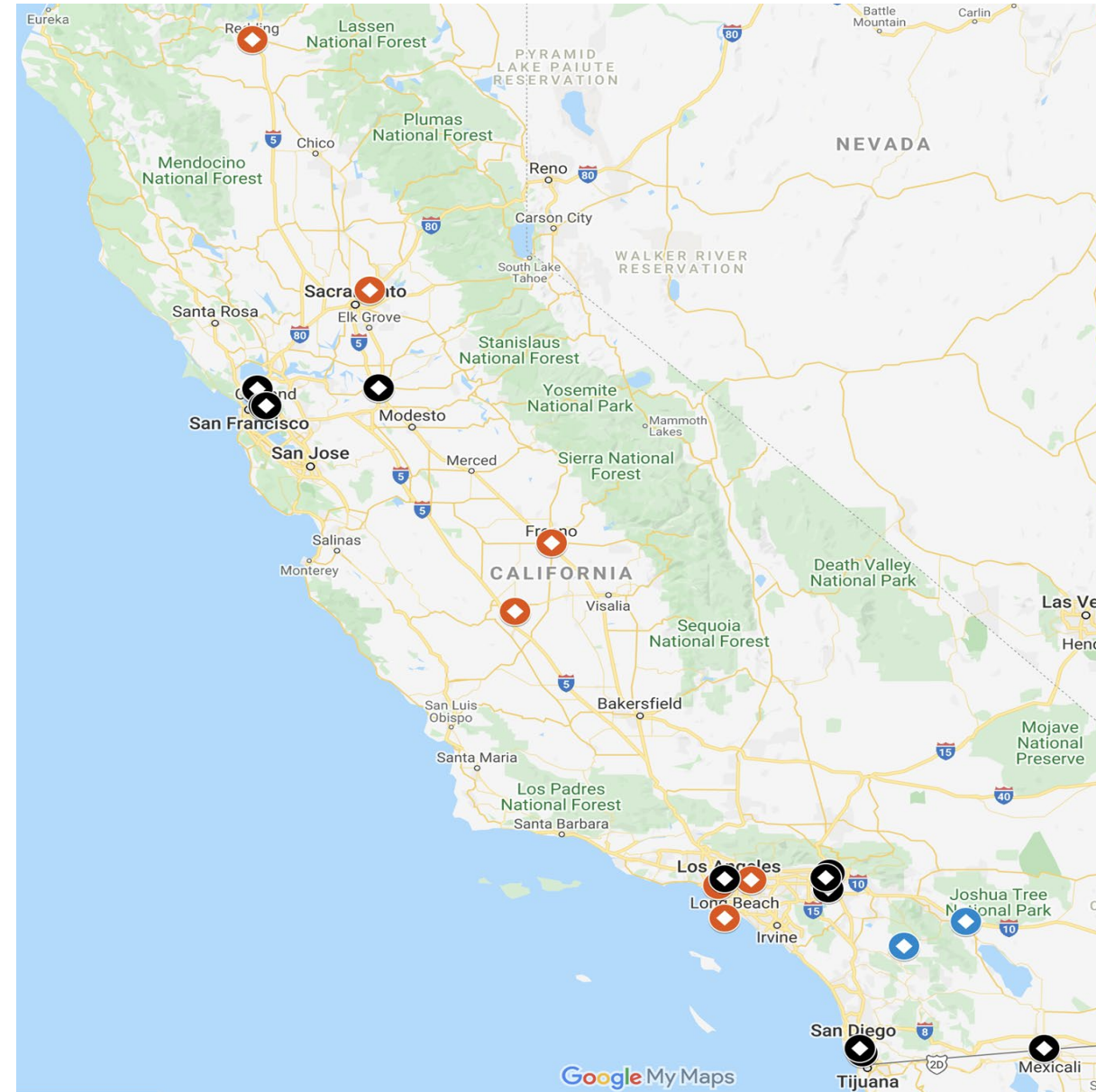
- City of Chula Vista
- City of National City
- City of Rialto
- City of Richmond
- City of Riverside
- Housing Authority of the City of Los Angeles
- Imperial County Transportation Commission
- Oakland DOT
- Oakland Unified School District
- Omnitrans
- San Joaquin Council of Governments
- City of Arvin
- Los Angeles Department of Transportation
- Los Angeles County Internal Services
- Housing Authority of County of San Joaquin
- Tulare County Association of Governments

Tribe

- Cahuilla Band of Indians
- Twenty-Nine Palms Band of Mission Indians
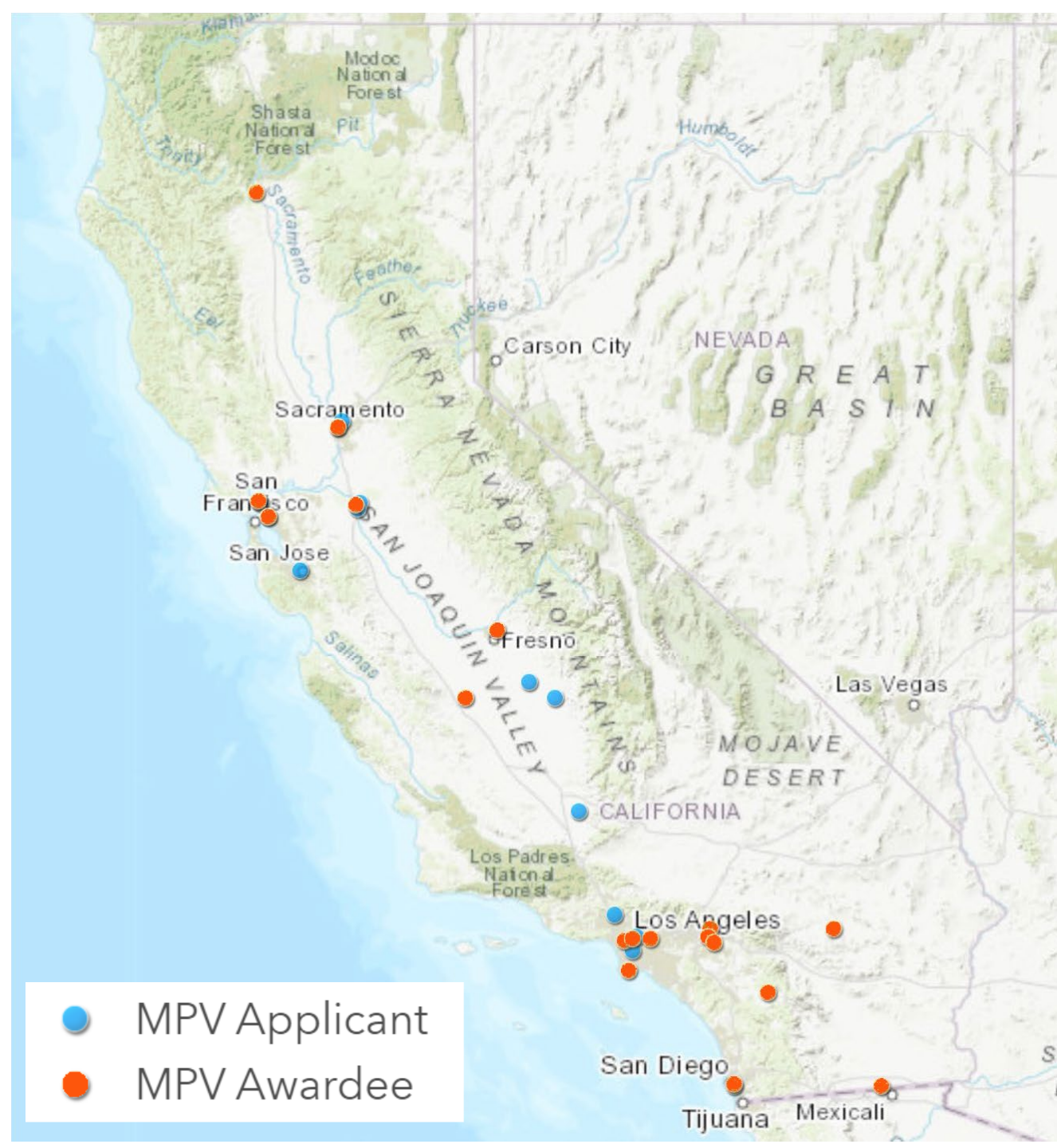
Legend:
- MPV Applicant
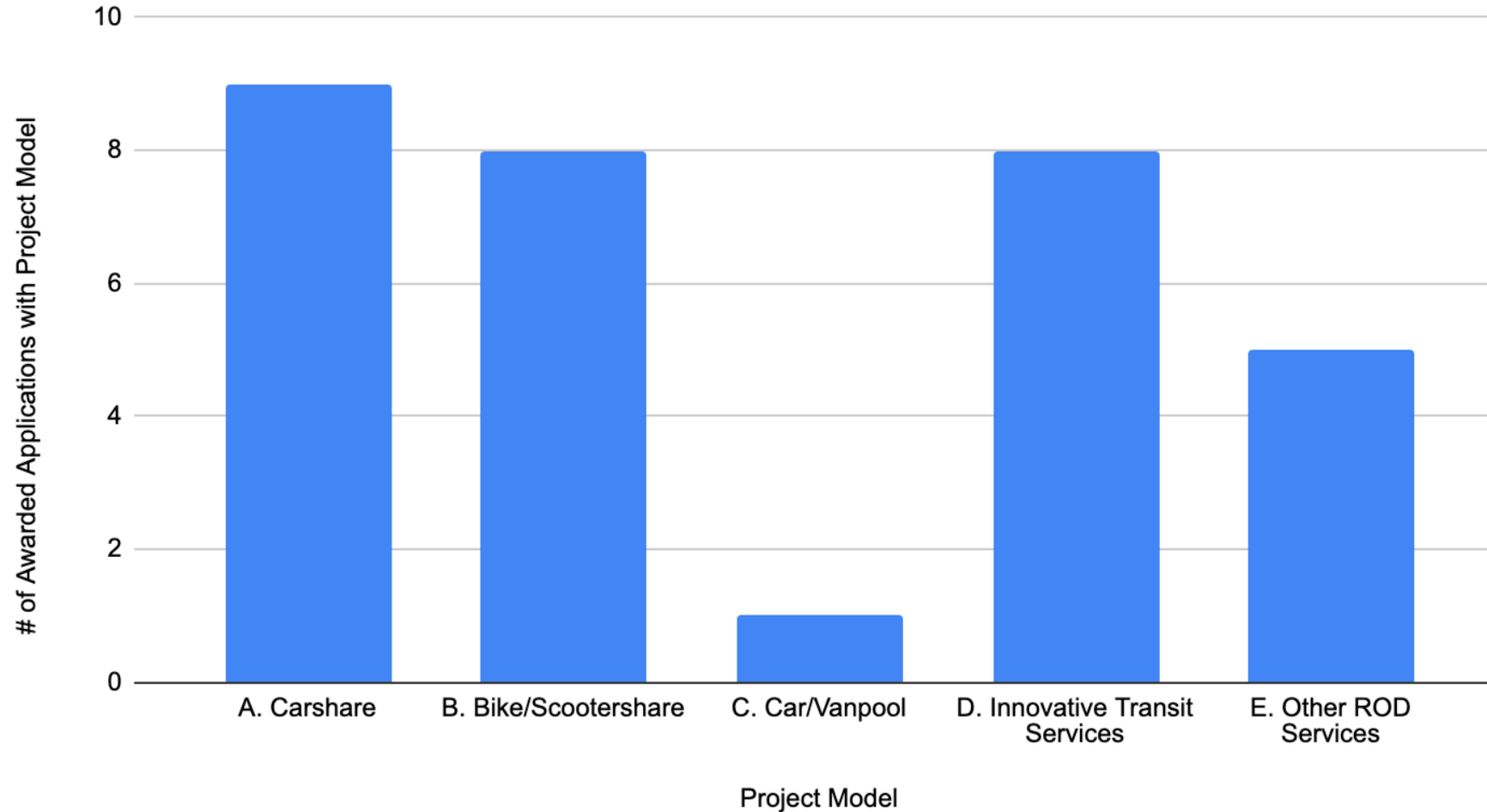- MPV Awardee

22
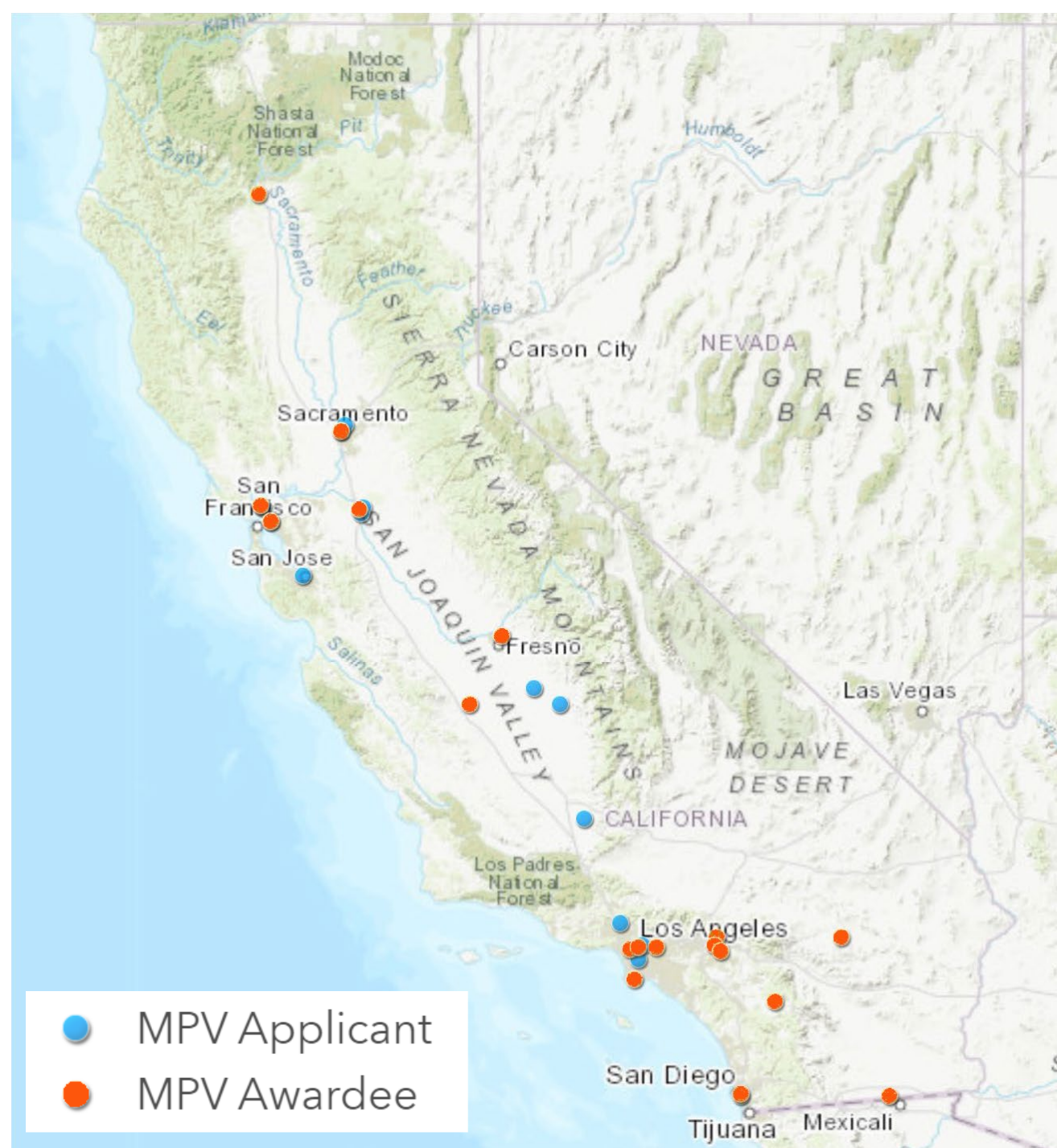
MPV Organizations (cont.)

- Community Economic Development Corporation
      / Institute for Maximum Human Potential
- Fresno Metro Black Chamber Foundation
- Los Angeles Cleantech Incubator
- Richmond Community Foundation
- The Energy Coalition
- The Latino Equity Advocacy & Policy Institute
- The McConnell Foundation
- 50 Corridor Transportation Management Association
- Green Tech
- Paratransit, Inc.
- First Community Housing
- Los Angeles County Bicycle Coalition
- Rich City Rides
- Environmental Justice Coalition for Water
- Self-Help Enterprises

Nonprofit

- MPV Applicant
- MPV Awardee

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Mobility Project Voucher Awardee Models

NOTES:
ROD = Ride-On-Demand.
Some applications had multiple project models

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Window 1 Evaluation

Goals and Methods

Goals:

- To improve the understanding of challenges associated with program design and application process
- To inform updates to the Program Implementation Manual

Methods:

- **Outreach to underrepresented communities:** 1-1 interviews and group listening sessions held between April and May 2021
- **Tribal governments 1-1 outreach:** Interviews in 2019 and 2020
- **Surveys of interested organizations:** Sent to W1 technical assistance recipients for CTNA and MPVs Winter/Spring 2021
- **Application gap analysis:** Makeup of Window 1 applicants and awardees compared with disadvantaged communities statewide

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Evaluation Topics

- Effectiveness of Technical Assistance

- Implementation Manual and Program Guidelines

- Barriers to Completing and Submitting an Application

- Representation Among Applicants and Awardees

- Unique Tribal Considerations

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Needs Assessment Voucher Application Survey Results

Technical Assistance

- Of those who received TA in developing their applications, 100% found it effective or very effective

- Suggestion for putting TA and application processes online to allow for greater support

- Suggestion to create space for knowledge-sharing among applicants

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Mobility Project Voucher Application Survey Results

Technical Assistance

- Of those who received TA in developing their applications, 88% found it effective or very effective

Program Guidelines

- Better clarification needed in some of the program requirements

- The Project Area Eligibility section of the IM created the most confusion of all the IM sections

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Mobility Project Voucher Application Survey Results (cont.)

Application Material

- Half of respondents found it **difficult** or **very difficult** to complete the application
  - The application requirements were too demanding
  - Too much pressure to submit in a timely manner
- The most difficult application sections to complete were:
  - Community Transportation Needs Assessment
  - Budget worksheet
- Would have preferred to submit application through an online portal instead of email

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Interviews and Listening Sessions

Application Submittal Process

- Need for funding notices well before applications are due

- Most frequent equity concern was internet connectivity quality and access, especially for rural community applicants

  - Challenging to put the application together in the first place

  - Too much pressure to submit in a timely manner in first come, first served (FCFS) process

- The most common supporting feedback for the process is:

  - FCFS is a straight-forward, easy to follow process

  - If not FCFS, some projects would not get funding

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Interviews and Listening Sessions (cont.)

- Interviewees indicated the need for TA that focuses on developing the application content

- Interviewees indicated support for a two-phase application process

  - Support having application components like site planning and financial sustainability plan due later in process

  - TA taking a bigger role in supporting application development

- No support for mandatory TA participation in order to apply

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Application Gap Analysis - Purpose

Stakeholders concerned about the risk of under-representation of marginalized communities and lower-capacity organizations arising from the FCFS application process

- **Understand the characteristics of awardees' communities and organizations**: Demographic, Geographic, Organizational Capacity

- **Evaluate whether awardees are representative of the most disadvantaged communities statewide**

- **Identify "gaps" in representation that may be addressed by program design changes**

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Characteristics of Awardees: Demographics

Mobility Project Voucher awardees,
compared to statewide DAC average

- **Lower** income

- **Higher** African-American, Asian-American/Pacific Islander, and Native American populations

- **Lower** Latinx and White populations

- **Higher** disabled populations

- More urban

CTNA Awardees,
compared to statewide DAC average

- **Lower** income

- **Higher** Latinx, Native American, and White populations

- **Lower** African-American and Asian-American/Pacific Islander representation

- **Higher** youth and/or seniors, limited English speakers, and unemployed
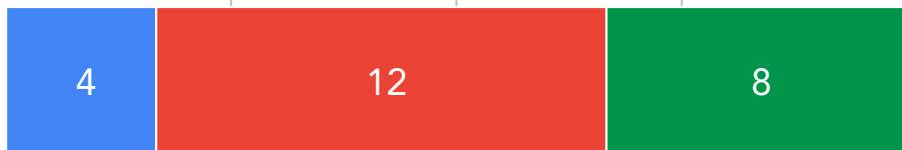
- More rural

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MPV Geographies

■ Northern California ■ Central Valley ■ Southern California

Applications (33)

Northern California	Central Valley	Southern California
7	11	15

Awardees (21)

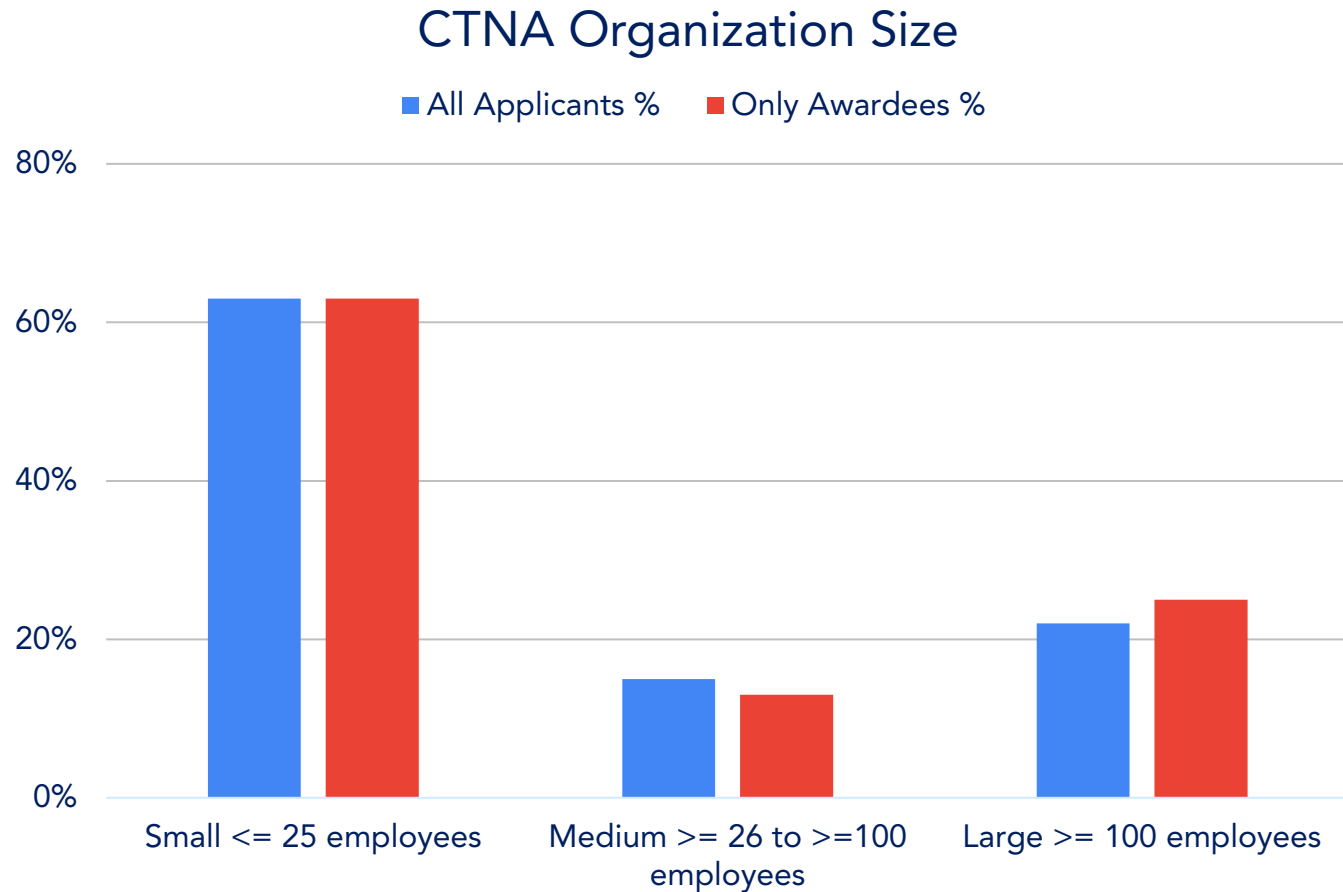| Northern California	Central Valley	Southern California
5	4	12

0%   25%   50%   75%   100%

Alameda (2)
Contra Costa (2)
Shasta (1)

Fresno (2)
Sacramento (1)
San Joaquin (1)

Imperial (1)
Los Angeles (4)
Riverside (2)
San Bernardino (3)
San Diego (2)

● MPV Applicant
● MPV Awardee

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Organizational Capacity by Staff Size – CTNA Voucher

CTNA Organization Size

■ All Applicants %   ■ Only Awardees %

- Small organizations with 25 or fewer employees, represented 63% of CTNA applicants and 63% of those awarded

- Medium-sized organizations with 26 to100 employees, represented 15% of CTNA applicants and 13% of those awarded

- Large organizations with more than 100 employees, were 22% of CTNA applicants and 25% of those awarded

Organizational Capacity by Staff Size – Mobility Project Voucher

- Small organizations, with 25 or fewer employees, were 55% of MPV applicants and 48% of those that were awarded

- Medium-sized organizations, with between 26 and 100 employees, were 12% of MPV applicants and 10% of those that received awards

- Large organizations, with more than 100 employees, were 33% of MPV applicants and 42% of MPV awardees

MPV Organization Size

38
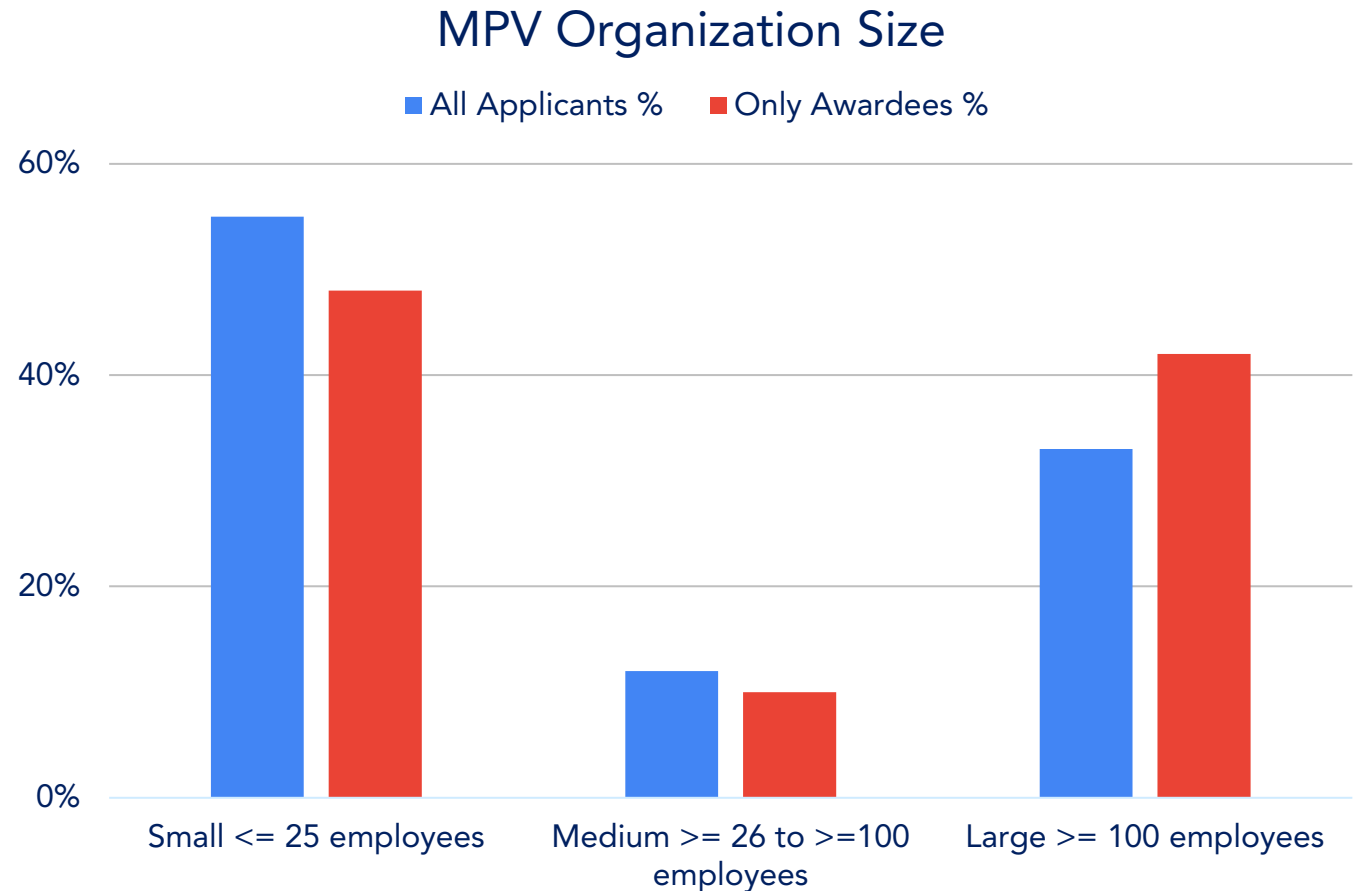
Application Gap Analysis - Conclusions

- Awarded communities are largely representative of DACs statewide

  - In many cases, they include higher proportions of vulnerable populations (income, disability, language, age) than DAC averages

  - CTNA vouchers were more rural and higher Latinx population than DAC averages

  - Mobility Project Vouchers were more urban and higher African-American and Asian-American proportion than DAC averages

- Half of awardee organizations are small in size

- Overall, the program is reaching intended communities, and adjustments can be made to further advance inclusion and equity in the program

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Tribal Engagement

Top concerns about participating in CMO include:

- Financial sustainability – concerns about ridership and long-term funding

- Eligible vehicle costs – medium-duty vehicle reimbursement amount is a barrier

- Needs assessment methodology – may not correspond with how tribal governments gather input from their members

Clean Mobility Options

Evaluating Voucher Effectiveness

- **Address some of the California State Auditor's audit recommendations**

- **Evaluate program effectiveness once projects launch**

  - Analyze behavioral changes due to increased access to clean mobility

  - Evaluate socioeconomic benefit impacts from investments

- **Make program changes based on evaluation for future funding windows**

- **Report out in future Funding Plans**

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Lunch Break

Proposed Changes to Program Design

Clean Mobility Options

What is the Implementation Manual?

- Describes the program design, including the following components:
  - Eligibility Criteria
  - Duties and Requirements
  - Sample Applications
  - Sample Voucher Agreements
- Originally developed in 2019, with a minor update in 2020
  - This version applied to Application Window 1 in 2020
- New version currently under development, with publication planned for late-Summer 2021

Clean Mobility Options

2021 Implementation Manual Update

- Proposed changes are based on a variety of factors, including:
  - Lessons learned from Application Window 1
  - Community feedback
  - Experience from mobility equity pilot projects
- To be refined and finalized through a public process
  - Interviews and listening sessions
  - Surveys of community organizations
  - Engagement with the Clean Mobility Equity Alliance (awardees)
  - Public Work Group Meetings

Clean Mobility Options

2021 Implementation Manual Update Topics

- Voucher Types and Window 2 Funding Amounts
- Applicant Eligibility
- Project Area Eligibility
- Infrastructure Siting
- EV Charging Installation
- Eligible Costs
- Awardee Duties and Requirements
- Application Processes

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Potential Available Window 2 Funding

- Current Baseline Amount: **$13 million, includes $8 million from CEC**

- Potential Total Amount: **$24-26 million** (pending State Budget & CARB Board approval)

Mobility Project Vouchers

Baseline Amount: $12 million

- Tribal set-aside: Up to $1 million
- CTNA W1 awardee set-aside: Up to $6 million

Potential Total Amount: $23-25 million

- Tribal set-aside: Up to $3 million
- CTNA W1 awardee set-aside: Up to $14 million

Needs Assessment (CTNA) Vouchers

Total Amount: $1 million

- Tribal set-aside: Up to $200,000

Clean Mobility Options

Prioritizing CTNA Window 1 Awardees for Window 2 Mobility Project Voucher Awards

Proposed Approach

- **Set aside 50% of MPV funding for CTNA voucher awardees from Window 1**

  - Out of 24 CTNA awardees, 12-18 have expressed their intent to apply for MPV funds

  - 183 of the 201 census tracts in CTNA awardee project areas are DACs

Goals:

- Continue to ensure a majority of funds go to DACs

- Address under-representation of predominately Latino and rural project areas in MPV awards

- Enable communities who are investing in needs assessments to take the next step

Clean Mobility Options

CTNA Voucher Framework

Existing Criteria

- Voucher amount/term: $50,000/9 months

Intent for Change

- Respond to community feedback that voucher amount was not sufficient to cover higher-than-expected costs such as insurance and administrative costs

- Ensure sufficient time and resources to carry out optional CTNA activities around funding research and application development, to better support taking the next step into mobility development

Proposed Criteria

- Voucher amount / term : **$75,000/12 months or $100,000/15 months**

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Project Area Eligibility

Existing Criteria

- All SB 535 DACs – 75th percentile in CalEnviroScreen

- *Deed restricted affordable housing within AB 1550 Low-Income Communities or DACs*

- Tribal Lands within AB 1550 Low-Income Communities or DACs

Intent for Change

- Include communities of concern that fall outside DACs, especially in low-income rural areas that were under-represented in Window 1 Mobility Project Voucher awards

- Continue to allocate most funds to SB 535 DACs (via CTNA W1 Awardee set-aside)

Proposed Criteria

- Expanding to **All AB 1550 Low-Income Communities**

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Project Area Definition

Existing Criteria

- **Project Area is** "the area where intended users live, where services are operated, and where most infrastructure is installed."

Intent for Change

- By including "where services are operated" in the definition of project area, there was confusion about whether services were allowed to operate outside the project area

- To deliver the most benefit to residents, it has been the intent to allow operations outside the project area, so that residents can reach key destinations

Proposed Criteria

- **Project Area is** "the area where intended users live, ~~where services are operated,~~ and where most infrastructure is installed."

- Clarify that at least part of the project area **must be built and occupied** by residents at the time of application submittal, in order to engage current residents in the required needs assessment

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Infrastructure Siting

Existing Criteria

Up to 20 percent of voucher-funded **services and infrastructure** may be located outside the project area, with documentation of supportive community input reflecting community-identified needs.

Intent for Change

- Considerable confusion among applicants about how to define their 20 percent and what documentation to provide

- Loosen this requirement to remove the barrier while ensuring that infrastructure investments continue to benefit DAC residents

Proposed Criteria

- Remove the 20 percent cap in infrastructure siting outside the project area

- Require awardees to identify the location(s) of all infrastructure and provide documentation of community input on infrastructure outside the project area, within six months of voucher execution

- Reinforce existing requirement that decisions to site infrastructure outside the project area must reflect community input

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EV Charging Installation

Proposed Change

- Installers of EV charging equipment (i.e., electric vehicle supply equipment, or EVSE) must be certified through the Electric Vehicle Infrastructure Training Program (EVITP)

Intent

- Ensure that EVSE is installed to high standards for safety and longevity of equipment, consistent with new State law- **Assembly Bill 841 (Ting, 2020)**

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Increase Eligible Reimbursement Cost for Zero-Emission Medium-Duty Vehicles

Existing Reimbursement Amount

- Same $ amount as incentive provided under the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP). This amount is usually less than 100% of the vehicle purchase cost.

Intent for Change

- Remove barriers for applicants wishing to operate on-demand shuttles or micro transit services but who do not have other sources of funding for vehicles.

Proposed Reimbursement Amount

- **100% of the vehicle purchase cost would be reimbursable**

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Current Application Evaluation Process

Process

- Applications are submitted during an Application Window that opens at a pre-specified time

- Applications are evaluated on whether they meet the full set of eligibility criteria

- Qualified applications are awarded on a FCFS basis until funding allocation is exhausted

    - Existing Process: Timestamp – the order in which they are received

Intent of FCFS Process

- Organizations with fewer resources have had difficulty competing with better-resourced agencies for funding where applications are ranked according to scoring criteria

- Scoring approaches can be more subject to bias and a lack of transparency

- FCFS was intended to level the playing field for organizations often marginalized in score-based systems

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Current Application Evaluation Process (Cont.)

Mixed Results from Window 1 Evaluation

- Applicants have spent a lot of time creating applications with no assurance they will receive funding. Completing the application itself has been burdensome.

- Demand for funding has exceeded supply, leading to a rush of application submittals at the "opening bell," creating a risk of excluding lower-capacity applicants.

- However, good demographic, geographic, and organizational representation in Window 1.

Proposed Approach for Window 2

- Maintain FCFS evaluation process as specified in the Funding Plan.

- Create a two-step application process with a shorter, simpler application as the first step.

- Create an online application portal to complete applications in advance.

- Discuss possibility of adding a lottery in the next Public Work Group meeting.

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Proposed Two-Step Application Process

Part 1 of the application is a simplified application asking for the eligibility basics (*applicant, project area, project model, needs assessment findings*)

Part 2 of the application assesses the broader set of eligibility criteria

- Part 1 Applications are approved through the FCFS process to create an *Applicant Pool*. All projects in the *Pool* are guaranteed funding, **if they complete an eligible Full Application by a set deadline.**

- An additional set of projects will be placed on a Waitlist to replace any potential drop out.

- Focused TA is offered to the Applicant Pool to support them in completing an eligible Full Application for review.

Clean Mobility Options

Online Application Portal

- Interactive online application as the default mode

- Simplifies application submission experience

  - Presents only the information needed (uses "pop-up" conditional questions)

  - Uses drop-downs where possible to make understanding of eligibility clearer and self-correcting to avoid mistakes

  - Allows for saving progress before the application window opens, minimizing stress of submittal

  - Provides more standardized approach to mapping

- Downloadable and provides automatic feedback email

- ADA-accessible word/paper copies still available option

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Other IM Changes

- Expand eligibility to CARB's current carshare and clean mobility pilots' grantees
- Clarify that the program is not intended to support maintenance of existing services, but can support expansion or new mobility elements
- Remove requirement that batteries in used electric vehicles must be new
- Improve budget template to ensure required expenses are addressed
- Loosen required hours of operation
- Loosen requirements around user fees

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Breakout Groups

Clean Mobility Options

Breakout Group Details

- Three breakout groups to facilitate more interactive discussion with attendees on proposed program design changes

- Each group will discuss the same three topics in 60 minutes:

  - **Total Funding Amounts and CTNA Voucher Framework**

  - **Eligibility - Project Area, Infrastructure, and Vehicles**

  - **Application Considerations**

Instructions

- Follow Zoom Meeting link in the Chat window to access our new main room. From there, attendees will be sent into breakouts by the host.

- After 60 minutes, everyone will be brought back to the Main Room, and breakout group notetakers will present a report-out from each group.

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Report-Outs

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Next Steps

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Next Steps

- **Submit any additional comments to info@cleanmobilityoptions.org by July 1st**

- **Admin Team conducts additional interviews and listening sessions with underrepresented communities**

- **Second public work group meeting to be scheduled for August**

- **Publication of Implementation Manual late-Summer 2021**

- **Application Window 2 to open in early 2022**

  - Visit https://www.cleanmobilityoptions.org/assistance/ to get support from the Admin Team

  - Subscribe to CARB updates at https://public.govdelivery.com/accounts/CARB/subscriber/new?preferences=true#tab1

Clean Mobility Options

Next Steps – Work Group 2 Topics

- Revised Work Group 1 proposals

- First come, first served lottery approach

- New guidelines on community outreach

- Streamlining reporting requirements

Clean Mobility Options

Statewide Clean Mobility Options Voucher Pilot Program

Public Work Group Meeting
2021 Implementation Manual Update
June 23, 2021

Please submit questions and comments by July 1st to: info@cleanmobilityoptions.org

CARB Contact: Ava Yaghoobirad, Ava.Yaghoobirad@arb.ca.gov