

Statewide Clean Mobility Options Voucher Pilot Program (CMO)

Public Work Group Meeting *2021 Implementation Manual Update*

August 25, 2021



Welcome and Introductions



Introduction to CMO Admin Team



Local
Government
Commission



Clean
Mobility
Options



CALIFORNIA
AIR RESOURCES BOARD



SHARED-USE
MOBILITY CENTER



Clean Mobility Options

Today's Agenda

1. Welcome and Introductions
2. Program Overview
3. Review of Outcomes from June Work Group
4. Proposed Changes to Program Design
5. Next Steps



Program Overview



Program Goals

Improve Priority Poulations' access to **clean mobility options** that are 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



What does CMO offer?

Two types of Voucher Funding

- Mobility Project Vouchers
- Community Transportation Needs Assessment Vouchers

Capacity Building

- Toolkits and Resources
- Peer exchange through the Clean Mobility Equity Alliance Network
- Ongoing, inclusive training

Technical Assistance Support

- 1:1 Individualized support
- 1:1 Tribal technical assistance and support
- Hotline calls
- Email support



Window 1 Funding: \$21.15 Million

Needs Assessment Vouchers

- **\$1.15 million** in community transportation needs assessment vouchers available
- \$150,000 of total set aside for tribal governments
- Maximum Project Budget: \$50,000
- 9-month term & funding
- **24 vouchers awarded**

Mobility Project Vouchers

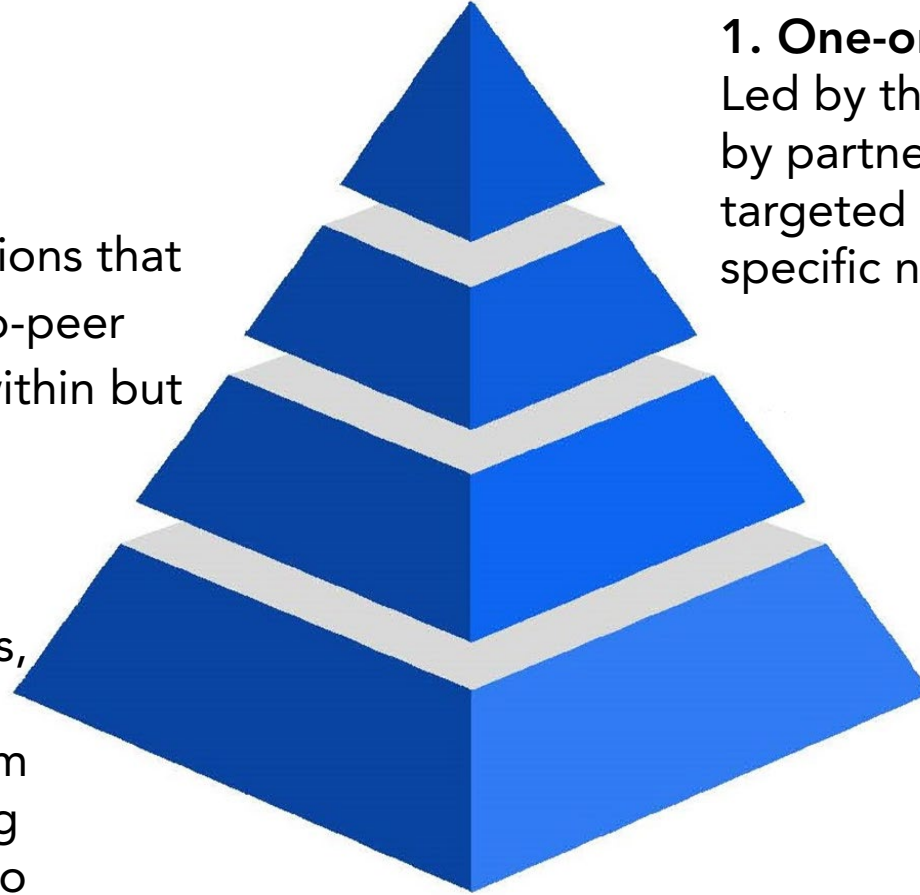
- **\$20 million** in mobility project vouchers available
- \$2 million total set aside for tribal governments
- Maximum Project Budget: \$1 million
- 5-year term (3 years of funding)
- **20 vouchers awarded**



Application Support and Technical Assistance

- Technical assistance tailored to applicant needs and delivered through many forms of communication and outreach.
- Tools include guidebooks, fact sheets, samples, templates, and a clean mobility provider directory
- Voucher applicants and awardees value technical assistance

Capacity Building through the Clean Mobility Equity Alliance



2. Peer-to-Peer Exchange

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

4. 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

1. One-on-One Assistance

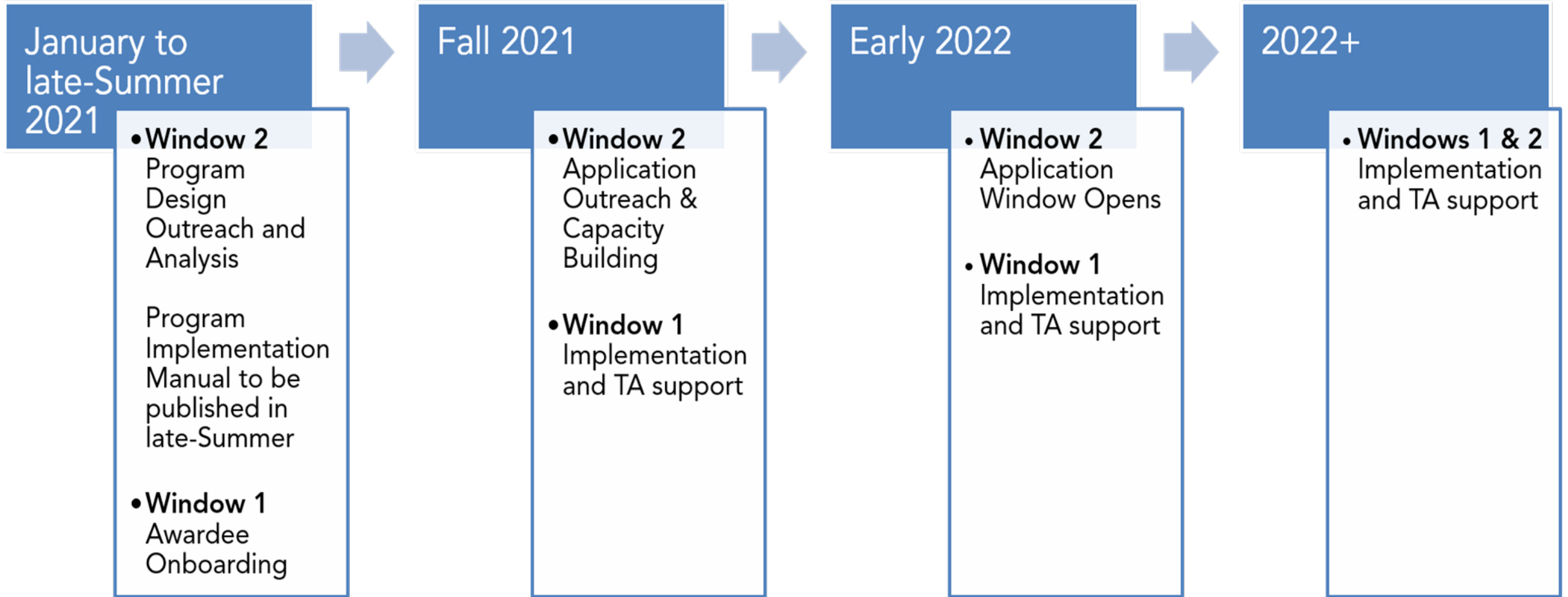
Led by the Account Manager and supported by partners, each project team receives targeted technical assistance based on specific needs and identified problems

3. Capacity Building Training

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



Program Timeline - Application Windows



What is the Implementation Manual?

- Describes the program design, components include:
 - **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**

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**

Review of Outcomes from June 23 Work Group



2021 Implementation Manual Update Topics

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

Potential Available Funding for Window 2

- Current Baseline Amount: **\$13 million, includes \$8 million from CEC**
- Potential Total Amount: **\$21-22 million** (pending CARB Board approval)

Mobility Project Vouchers

Baseline Amount: \$12 million

- Tribal set-aside: Up to \$1 million
- Window 1 needs assessment awardee set-aside: Up to \$6 million

Potential Total Amount: \$20-21 million

- Tribal set-aside: \$2 million
- Window 1 needs assessment awardee set-aside: \$10 million

Community Transportation Needs Assessment Vouchers

Total Amount: \$1 million

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



Overview of Work Group 1 Proposals

- Increase Community Transportation Needs Assessment voucher budget/term from \$50,000/9 months to **\$75,000/12 months**
- Expand project area eligibility to **include all AB1550 communities** in addition to CalEnviroScreen 75th percentile DACs
- Modify definition of project area to **clarify that services may operate outside** of the project area
- **Loosen infrastructure siting requirements** to allow investment outside the project area with documented support from project area residents

Overview of Work Group 1 Proposals (cont.)

- Require that installers of EV charging equipment be certified through the **Electric Vehicle Infrastructure Training Program**, consistent with AB 841 (Ting, 2020)
- Increase the eligible reimbursement amount for ZEV medium-duty vehicles from HVIP incentive cap to **100 percent of the vehicle purchase cost**
- Existing CARB grantees and CMO voucher awardees are eligible to apply as lead applicants for **either a new project or expansion of their current service**. *Voucher funds are not allowed for any costs related to their existing pilot project.*
- Propose two-step application process with a **shorter, simpler application as the first step**

Application Evaluation Process

First-Come, First-Served

What we have heard:

- Complex application, too much pressure to submit in a timely manner
- Internet connectivity quality and access issues, especially for rural community applicants
- Stakeholders concerned about the risk of under-representation of marginalized communities and lower-capacity organizations
- Applicants invest a lot of time and resources creating applications with no assurance they would receive funding
- High demand for funding, leading to a rush of application submittals at the "opening bell", creating a risk of excluding lower-capacity applicants

Window 1 Application Gap Analysis

- Understand the characteristics of awardee and non-awardee 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

Gap Analysis Findings

- Small organizations (25 or fewer employees) represented 63 percent of needs assessment awardees and 48 percent of mobility project awardees
- Awarded communities include higher proportions of vulnerable populations (income, disability, language, age) than DAC averages
- Needs Assessment awardees were more rural and higher Latinx population than DAC averages
- Mobility Project awardees were more urban and higher African-American and Asian-American proportion than DAC averages
- Overall, the program is reaching intended communities, and adjustments can be made to further advance inclusion and equity in the program



Proposed Application Process

- Create a **two-step application process** with a shorter, simpler application as the first step: a less time-consuming application means under-resourced communities will not be investing lot of resources into an application that may not be funded in the end
- Create a **user-friendly online application** which allows for saving progress and uploading all documents in advance: to help lower the stress during “opening bell” submittal and eliminate email latency issues for applicants with lower quality internet
- Maintain a version of first-come, first-served evaluation process as specified in the CARB Funding Plan



Overview of Two-Step Application Process

Part 1 of the application is a simplified application asking for eligibility basics

- Applicant, needs assessment findings, project area, project model

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

- Part 1 Applications are approved through the first-come, first-served 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 applicant withdrawals
- Focused technical assistance is offered to the Applicant Pool to support them in completing an eligible Full Application for review



Additional Proposals for Implementation Manual Updates



Additional Improvement on Application Evaluation Process: Randomization of Part 1 Applications

Issue:

Fairness of first-come, first-served process during part 1 of the application submittal: bandwidth complications and bad internet connections can make it difficult for rural applicants to submit their application fast enough

Proposal:

Randomization of Part 1 Applications only if oversubscribed on the first day: to ensure everyone gets a fair chance regardless of their situation



Day 1 Randomization: Proposal Summary

Current Approach

1. Accept applications
2. Create processing list ordered by:
 - a. Timestamp
3. Evaluate applications in order, reviewing for eligibility
4. Make awards in order

Proposed Approach

only if funding is oversubscribed on Day 1

1. Accept applications
2. Equalize first-day applications by putting them in random order
3. Create processing list ordered by:
 - a. Randomized results (Day 1 applications)
 - b. Timestamp for applications received after Day 1
4. Evaluate applications in order, reviewing for eligibility
5. Make awards in order



How applications would be randomized?

- Recommended randomizer mechanism is [Random.org](https://www.random.org/)
 - Reputable service used for other grant programs
 - True randomization
 - Independently validated
- Randomization is administered double-blind with oversight committee and additional quality control measures
- Examples of other State grant programs with a combination of first-come, first-served and randomization process:
 - MASH: [Multifamily Affordable Solar Housing](#)
 - SGIP: [Self-Generation Incentive Program](#)
 - SOMAH: [Solar on Multifamily Affordable Housing](#)



“New Service” vs. an “Existing Service”

Existing Criteria

- Funding is available for a New Service (not currently operating in the project area) or an Existing Service (currently operating in the project area)
 - Maximum budget for New Service: \$1,000,000; Maximum budget for Existing Service: \$600,000
- If the proposed project includes a combination of both New Service and Existing Service, the total voucher amount requested can be up to \$1,000,000.

Intent for Change

- Need to ensure CMO funding is directed towards project start-up costs.
- Some Window 1 applications applied as *New Service* by adding a minor new element and mostly funding existing services.



“New Service” vs. an “Existing Service” (cont.)

Proposed Criteria

- To be eligible for \$1M budget as a New Service, **no funds may be used to maintain services already operating in the area.**
- If the proposed project includes a **combination of both New Service and Existing Service**, the total voucher amount requested can be up to **\$600,000.**



Other Implementation Manual Updates

- Introduce minimum \$ requirement for Project Admin budget category
- Increase the Project Admin budget cap to accommodate higher-than-expected costs such as insurance and participation in Clean Mobility Equity Alliance (CMEA)
- Add CMEA participation to the Duties and Requirements
- Allow use of an umbrella liability insurance policy to make up the difference between a standard liability policy and the CMO program insurance requirements

Other Implementation Manual Updates (cont.)

- Remove voucher expiration deadlines associated with the project milestone schedule
- Increase the voucher expiration deadline for capital costs from 9 months to 12 months (continuing to allow for extension requests)
- Remove application requirement “Infrastructure Sites and Needs Profile,” with new requirements to submit infrastructure locations within three months of project start
- Flexibility in Needs Assessment methodology for tribal government applicants, where data may not be available to complete the Transportation Access Data Analysis

Next Steps



Next Steps

- Submit any additional comments to info@cleanmobilityoptions.org by **September 1st**
- Admin Team completes second round of interviews and listening sessions with underrepresented communities
- Publication of Implementation Manual late-Summer 2021
- Application Window 2 to open in early 2022
 - Visit 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>



THANK YOU!

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

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