

# 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



SHARED-USE  
MOBILITY CENTER



Clean  
Mobility  
Options



CALIFORNIA  
AIR RESOURCES BOARD



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**

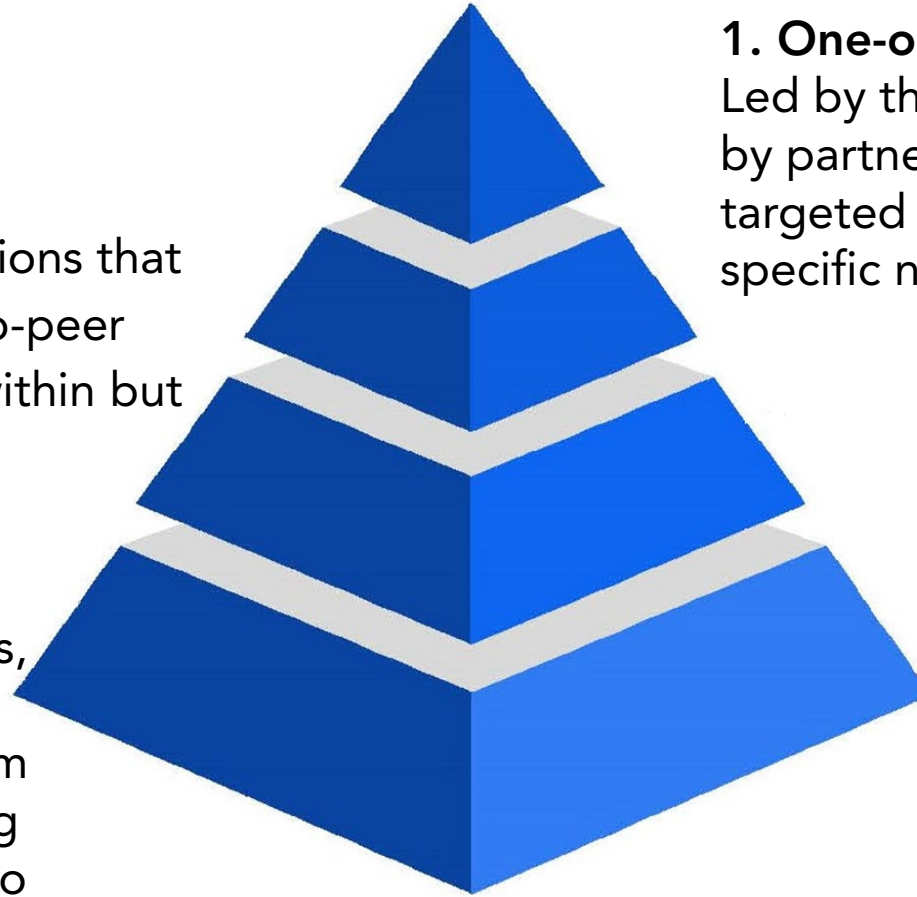




# Application Support and Technical Assistance

- 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



## 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

## 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

## 3. Capacity Building Training

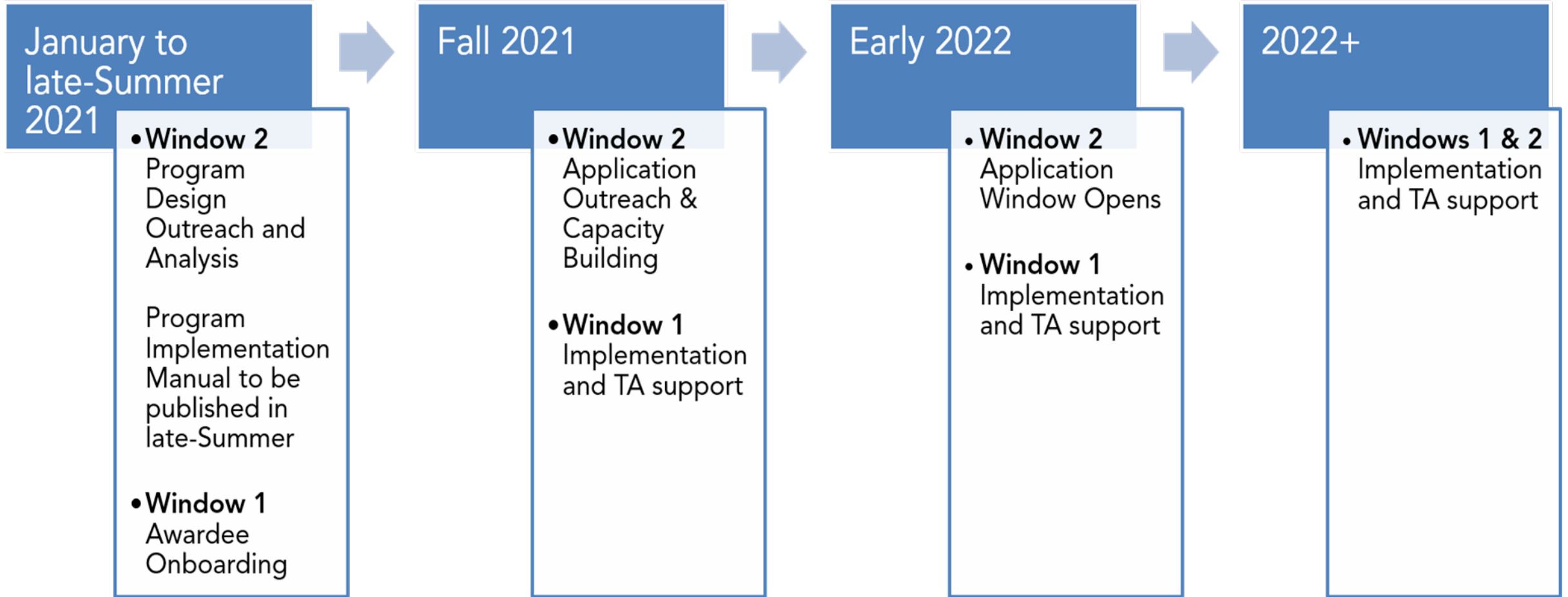
Facilitated through larger meetings, training on specific topics allow for broad dissemination and equal access to experts and materials

## 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



# 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 75<sup>th</sup> 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](mailto: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/](http://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 1<sup>st</sup>  
to: [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org)

CARB Contact: Ava Yaghoobirad, [Ava.Yaghoobirad@arb.ca.gov](mailto:Ava.Yaghoobirad@arb.ca.gov)

