# Second Public Work Group to Discuss Clean Mobility Investment Projects and the Fiscal Year 2022-23 Update to the Three-Year Plan for Clean Transportation Equity Investments

April 19, 2022

# Welcome and Introductions

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# Agenda

| Time | Topic |
|------|-------|
| 9:00 a.m. | Welcome and Introductions |
| 9:05 a.m. | Agenda and Work Group Overview |
| 9:10 a.m. | Recap of Past Discussions and Feedback |
| 9:30 a.m. | Comments and Questions |
| 9:45 a.m. | Evaluations of Investment Progress and Benefits |
| 10:15 a.m. | Long-Term Plan Proposal and Questions |
| 10:50 a.m. | Comments and Questions |
| 11:20 a.m. | Break |
| 11:30 a.m. | Next Steps |
| 11:40 a.m. | Comments and Questions |
| 12:00 p.m. | Adjourn |

# Work Group Overview

- CARB to develop a long-term plan for clean mobility investments (SB 1275)
  - Includes vehicle purchase incentives and the zero-emission vehicle market
- Kick-off meeting February 17 set the stage for long-term plan development
- **Today's work group focus: CARB's clean mobility proposal and public input**

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# Long-Term Plan Approach and Goals

- Consider feedback to date from project administration and implementation

- Determine best way to transition from mobility pilots to community-based programs

**Pilot Project Phase:**
Significant investments adapted to meet funding gaps identified per SB 350

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**Community-Based Program Phase:**
Accelerate investments, expand services, and ensure equity

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# Governor's January 2022 Proposed Budget
## *Fiscal Year 2022-23 to Fiscal Year 2025-26*

| Fiscal Year (FY) | Funding Projected (in millions) |
|---|---|
| FY 2022-23 | $65 |
| FY 2023-24 | $130 |
| FY 2024-25 | $134 |
| FY 2025-26 | $90 |
| **Multi-Year Total** | **$419** |

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# Governor's March 2022 ZEV Acceleration Package

- Accelerates the transition to zero-emission vehicles and fights climate change

- Promotes and supports sustainable communities

- Funding could be accelerated to communities

- Increases importance of leveraging existing projects and funding mechanisms

Governor Newsom Outlines Historic $10 Billion Zero-Emission Vehicle Package to Lead the World's Transition to Clean Energy, Combat Climate Change

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# Clean Mobility Projects

Regional Clean Mobility Projects

Clean Mobility in Schools (CMIS)

Workforce Training and Development

Community Outreach, Technical Assistance, and Capacity Building

Clean Mobility Options Voucher Pilot Program (CMO)

Sustainable Transportation Equity Project (STEP)

Community Transportation Needs Assessments

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# Links to Clean Mobility Investments

**Projects**: LCTI Projects in Action

- Clean Mobility Options Voucher Pilot Program
- Clean Mobility in Schools
- Sustainable Transportation Equity Project (STEP)

**User Information**: Clean Mobility User Information

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# Recap of Past Discussions and Feedback

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# Transportation Equity

*"When a community's transportation system provides **accessible**, **affordable**, environmentally **sustainabl**e, **reliable**, and **safe** transportation options to all residents, in particular those that have been disproportionately impacted by pollution or lack access to services. Transportation equity is intrinsically linked to **access to economic opportunities** and occurs when community residents have the **power to make decisions** about their transportation systems."*

- Definition developed through STEP solicitation public process shared at the February 17, 2022, work group

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# Clean Mobility Investment Objectives

Increase access to key destinations

Reduce greenhouse gas emissions and vehicle-miles traveled

Identify / address communities' transportation needs

Incorporate community-driven decision making

Make projects financially sustainable

Prioritize workforce development

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# Clean Mobility Investment Objectives (cont.)

Streamline application process and simplify requirements

Document and share lessons learned

Assess outcomes and adjust policies to maximize benefits

Direct engagement and outreach in communities

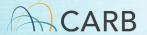Prioritize investment in underserved communities

Balance investments geographically

Balance existing projects with opportunities for new communities to access funding

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# Feedback Mechanisms

- Public work groups and direct discussions with interested stakeholders
- Quarterly and final reports, meetings with grantees, subgrantees, and other project partners
- Survey responses from clean mobility service users
- Past solicitation applicants
- Evaluations from project administrators and technical assistance providers
- Discussions with other State agencies

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# Common Feedback on Mobility Projects

- These **projects are important** but the application process and requirements are too complex
- **Prioritize and serve most impacted** communities
- Tailor offerings (planning/capacity building/implementation) **based on unique community needs**
- Challenges with **financial sustainability**
- **Insurance** requirements pose barriers
- Projects need **more time and money**
- **Regional/local technical assistance** more useful than statewide assistance
- Challenges with the **current statewide administrator approach**
- **Partnership development** is important but resource-intensive

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# **Evaluations of Investment Progress and Benefits**

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# Evaluation Methods

- CARB evaluations
- Third-party evaluation contracts
- Project Grantees and Program Administration

**Goal:**

Continuously update to use existing and collected data to measure and report on each metric

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# Evaluation Elements

- Vehicle telematics (e.g., car share and school buses)
- User surveys
- Focus groups
- Opinion data (e.g., zero-emission equipment)
- Interviews

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# CARB Evaluation of Program Outcomes and Community Benefits

- GHG and VMT reductions

- Clear and measurable metrics to assess socioeconomic benefits and behavioral changes
  - Increased access to key destinations, goods, and services
  - Assess existing conditions and changes (e.g., home ownership, use of personal vehicles, and health disparities)
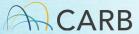
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# Current Internal Evaluations

**Ongoing Review and Lessons Learned**
- Solicitation/application evaluations
- Grantee/voucher recipient and partner feedback
- Community awareness of available investments (outreach metric)
- Subjective benefits (e.g., quality of life and local wealth)
- Behavioral changes as a result of project implementation
- Demographic makeup of project participants and leadership

**Senate Bill 150 / Sustainable Communities Strategies**
- Feedback from Metropolitan Planning Organizations (MPOs) and local/regional entities

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# Current Third-Party Evaluation Contracts

- UC Berkeley Othering and Belonging Institute
- UC Berkeley Transportation and Sustainability Research Center
- Steer Group
- UC Los Angeles Institute of Transportation Studies

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# UC Berkeley Othering and Belonging Institute

**Kicked-off late 2021**

**Scope:** Evaluate existing practices to develop recommendations for equitable, community-based transportation planning; community transportation needs assessments; and more equitable State programming

**Methodology:**

- Research relationship between community transportation needs assessments and other types of transportation planning
- Evaluate CMO and STEP-related needs assessments
- Conduct evaluations using community participatory approach

**Current Status:** Discovery phase and subject matter expert interviews

**Timeline:** Final discovery report in September 2022, equity recommendations report in June 2023, and final evaluation report in October 2023

# UC Berkeley Transportation and Sustainability Research Center

**Kicked-off June 2020**

**Scope:** Evaluate CARB-funded clean mobility projects for success in improving mobility, reducing GHG emissions, reducing VMT, etc.

**Methodology:**

- Evaluate legacy clean mobility projects
- Conduct pre-project assessments on STEP and CMO mobility projects
- Evaluate a subset of STEP and CMO mobility projects

**Current Status:** Planning phase developing evaluation and data plans and working with current grantees on surveys

**Timeline:** Final report in March 2023

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# Steer Group

**Kicked-off early April 2022**

**Scope:** Review, identify, and assess financing tools and strategies for sustaining community-scale, zero-emission mobility services in low-income and disadvantaged communities

**Methodology:**

- Identify tools used to finance mobility projects other than direct grants
- Identify other tools and strategies that have been used for sustained financing in other sectors

**Current Status:** Discovery and idea collection phase to help scope review of financial tools and resources

**Tentative Timeline:** Final white paper in February 2023

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# UCLA Institute of Transportation Studies

**Kicked-off March 2022**

**Scope:** Improve the understanding of how Metropolitan Planning Organizations (MPOs) select projects for Sustainable Communities Strategy (SCS) implementation

**Methodology:**

- Review and assess methods that MPOs use for SCS project selection
- Provide recommendations for transportation project assessment and selection

**Current Status:** Reviewing Regional Transportation Plans/SCS project selection tools and practices for selected MPOs

**Tentative Timeline:** Final report in February 2024

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# Other Potential Mechanisms to Assess Program Effectiveness

## Equity advisory group

- Ongoing program-level involvement and evaluations
- Review equity across programs to determine what more needs to be done to meet our goals

## Third-party evaluation

- Build on existing evaluations and research contracts
- Determine additional needs to measure benefits based on findings from existing third-party efforts

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# Evaluation Across Project Phases

- Funding Plan development
  - Programmatic changes that should be made
- Implementation design
  - Program work groups
  - Community-level considerations
- Assessment of outcomes
  - User satisfaction
  - Socioeconomic benefits
  - Behavioral changes

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# Comments and Questions

Use the raised hand function (#2 if calling in by phone) or submit your question or comment in the Q&A box on Zoom.

Please state your name and affiliation before asking a question or making a comment.

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# Long-Term Plan Proposal and Questions

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# Proposed Approach for Long-Term Plan

- Address community needs through two approaches:
  - Planning and Capacity Building Grants
  - Clean Mobility Grants
- Includes:
  - Annual updates to programs based on feedback and evaluations
  - Support for Sustainable Communities Strategy implementation
  - Workforce development

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# Proposed Funding Splits

| Project Type | Total Funding ($419 million)<br><br>Proposed Splits | Percent of Funding |
|---|---|---|
| **Planning and Capacity Building**<br>(flexible based on needs) | $42 million | 10% |
| **Clean Mobility**<br>(Clean Mobility Options, Clean Mobility in Schools, and STEP) | $373 million ($124 million each)* | 89% |
| **State Operations** | $4 million | 1% |

*For simplicity based on percentage of total funding allocated. Open for comment and discussion.*

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# Long-Term Plan Funding Methodology

- Leverage ongoing data and lessons learned
- Consider pilot oversubscription and underestimation of project costs
- Consider longer-term needs over the next 5-10 years
- Replication of projects in other communities
- Determine where CARB can maximize benefits and fill gaps in State funding to make current projects sustainable
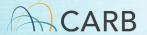
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# Proposed Approach for Planning and Capacity Building Grants

- Design based on lessons from CMO, CMIS, and STEP
- Provide flexibility to fund everything needed to prepare a shovel-ready project:
  - Community organizing, engagement, and clean transportation outreach
  - Community transportation needs assessments
  - Clean transportation planning and development

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# Proposed Approach for Clean Mobility Grants

- Update CMO, CMIS, and STEP based on lessons learned
- Provide flexibility to fund community-identified transportation and workforce development needs
- Connect to Planning and Capacity Building program
- Consider funding projects that are consistent with Sustainable Communities Strategies

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# Questions for Discussion

- What are additional considerations for measuring funding demand and needs across CARB's programs?

- Should CARB frontload Planning and Capacity Building grant funding ahead of Clean Mobility grant implementation?

- What kind of planning and capacity building work is needed in communities?

- Is 10% ($42 million) to support planning and capacity building needs enough?

- What gaps does CARB need to fill in its Planning and Capacity Building and Clean Mobility grants?

- How can CARB improve the connection between Planning and Capacity Building projects and Clean Mobility funding?

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# Questions for Discussion (cont.)

- Should funding be split evenly across CARB's clean mobility programs (CMO, CMIS, STEP)?

- Would combining clean mobility programs reduce complexity and help streamline applications?

- Should CARB incorporate Sustainable Communities Strategy projects that reduce vehicle miles traveled into STEP or other mobility programs?

- What are the most impactful ways for CARB to increase access to funding for rural, Tribal, and communities of color?

- How much should CARB prioritize funding new communities vs. maintaining existing projects?

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# Comments and Questions

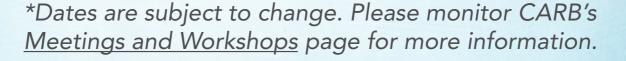Use the raised hand function (#2 if calling in by phone) or submit your question or comment in the Q&A box on Zoom.

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# Upcoming Meetings

| Date* | Milestone |
|---|---|
| Mid-May | Governor releases revised FY 2022-23 Budget proposal |
| Late May | Third light-duty vehicle work group meeting for the Long-Term Plan |
| **Late May** | **Third clean mobility work group meeting for the Long-Term Plan** |
| March-July | Various public meetings for the FY 2022-23 Funding Plan |
| July 2022 | Final FY 2022-23 Funding Plan Workshop |
| Fall 2022 | Release proposed 2022-23 Funding Plan with long-term plan appendix for consideration at late-2022 Board meeting |
| Late Fall 2022 | FY 2022-23 Funding Plan Board Meeting |

*Dates are subject to change. Please monitor CARB's Meetings and Workshops page for more information.*

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# CARB Contact Information

- **CARB Long-Term Plan Update and Mobility Strategy Contacts:**
  - Ashley Georgiou, Ashley.Georgiou@arb.ca.gov
  - Bree Swenson, Breanna.Swenson@arb.ca.gov
- Direct outreach and engagement is welcome – we want to hear from you!
- Subscribe to CARB's GovDelivery listserv to stay informed

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# Comments and Questions

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# Adjourn

# Thank you for participating!

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